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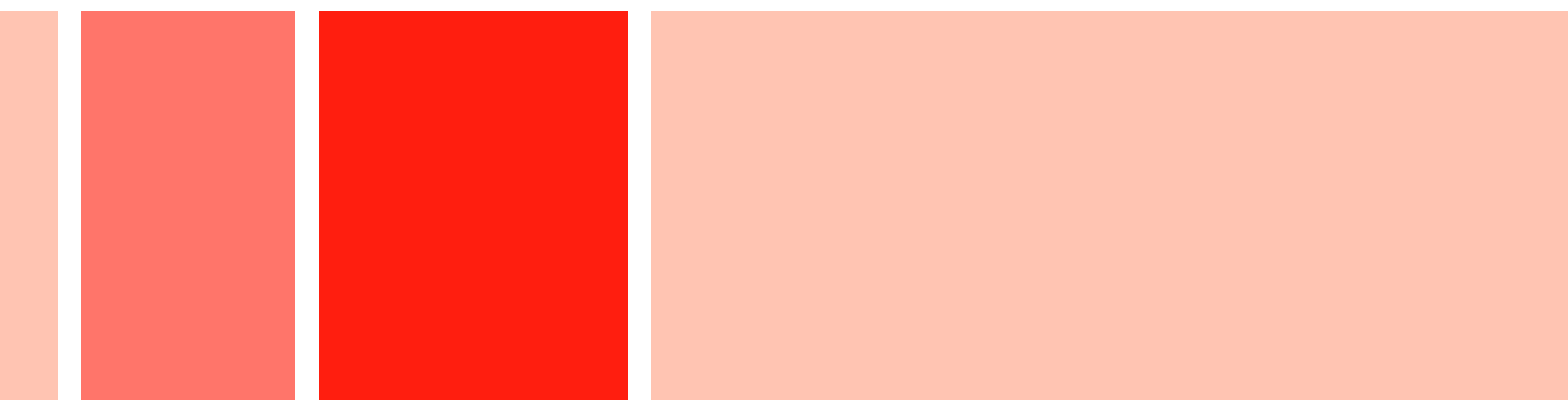


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Wales Visitor Survey 2011

UK Day Visitors - Executive Summary



Wales Visitor Survey 2011: UK Day Visitors Research on behalf of Visit Wales

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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

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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 UK Day Visitors to Wales only – findings for Overseas Visitors are UK Staying Visitors reported separately. In addition there is a full report for UK Day 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 **1,645** face to face interviews were conducted with UK Day Visitors during their trip in Wales between April and September 2011 with an online follow up questionnaire completed by **194** UK Day Visitors after the visit.
- **The profile of UK Day Visitors is slightly skewed towards the ABC1 demographic**, with nearly two thirds in this group (Table 1). In terms of lifestage segmentation the largest category is *Empty Nesters* which accounts for just over 40% of UK Day Visitors (Table 2).
- **Over three quarters of UK Day Visitors are from Wales:** highest in West Wales (94%) and lowest in North Wales (46%) (Table 3).
- **Repeat visits are high.** Only 13% of UK Day Visitors from outside Wales are new to Wales: with just 6% of Welsh visitors visiting the area for the first time (Table 4).
- **Satisfaction with the trip is high:** two in five rated Wales 10/10 as a place to visit (Chart 1).
- **Top performing elements of the trip relate to the natural environment and people.** Elements that perform less well (but still perform positively) are associated with commercial tourist facilities such as shops and places to eat. (Table 5).
- **Nearly half have mobile internet capability :** but only 15% of UK Day Visitors had access *and* used their mobile device during their day trip to find out things. (Table 6).
- **The use of websites as information sources prior to the trip is growing:** just over a two in five consulted a website for information prior to their trip (up from one in ten in 2009). (Table 7).
- **During the trip leaflets at attractions 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 quarter of UK Day Visitors. (Table 8).

Table 1: Socio Economic Group - Stage I data

	UK Profile*	TOTAL		Region visited			
		2011	2009	North	Mid	South	West
ABC1	51%	64%	61%	59%	58%	67%	64%
C2DE	49%	35%	39%	40%	40%	32%	35%
Sample size	-	1,645		302	390	593	360

Base: all Day Visitors

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

Table 2: Lifestage - Stage I data

	TOTAL		Wales Residents	Region visited			
	2011	2009		North	Mid	South	West
Young Independents <i>Aged under 35, no children in household</i>	10%	11%	10%	11%	7%	12%	6%
Older Independents <i>Aged 35-54, no children in household</i>	18%	17%	16%	24%	20%	17%	15%
Families <i>Any children in household</i>	31%	28%	32%	26%	26%	33%	33%
Empty Nesters <i>Aged 55+, no children in household</i>	41%	43%	42%	39%	47%	39%	46%
Sample size	1,602	2,099	1,182	291	376	579	356

Base: all Day Visitors

Table 3: Country of Origin - Stage I data

	TOTAL		Region visited			
	2011	2009	North	Mid	South	West
Wales	77%	79%	46%	56%	84%	94%
England (Midlands and North)	14%	15%	50%	35%	3%	2%
England (South East)	3%	1%	3%	6%	2%	3%
England (South West)	6%	5%	1%	3%	10%	1%
Scotland	0%	0%	0%	0%	0%	0%
Northern Ireland	0%	0%	0%	1%	0%	0%
Sample size	1645	2,099	302	390	593	360

Base: all Day Visitors

Table 4: New/ repeat visits - Stage I data

	TOTAL		Region visited			
	2011	2009	North	Mid	South	West
WELSH VISITOR – first time to area	6%	9%	1%	3%	7%	8%
WELSH VISITOR – visited before	91%	79%	97%	96%	91%	89%
Sample size	1,213	1,461	129	268	486	330
OTHER UK VISITOR – first time to Wales	13%	8%	8%	12%	16%	29%
OTHER UK VISITOR – visited before	84%	85%	89%	88%	79%	71%
Sample size	432	638	173	122	107	30*

Base: all Day Visitors

*Caution: low base

Chart 1

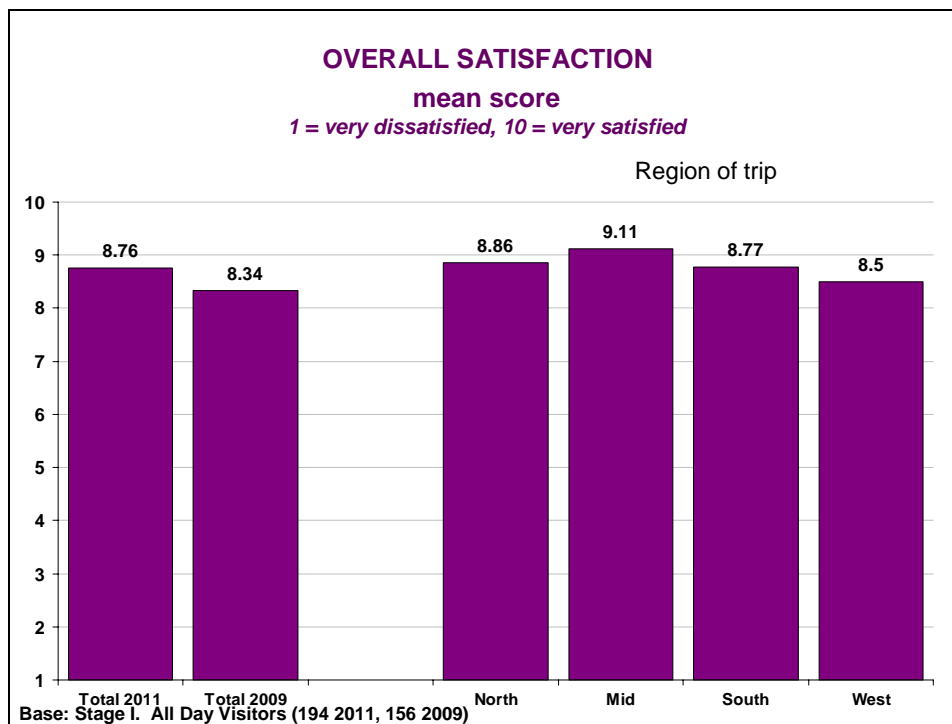


Table 5: Mean scores – satisfaction with trip dimensions (during the visit) - Stage I data

	TOTAL		Region visited			
	2011	2009	North	Mid	South	West
Quality of the natural environment	9.21	-	9.28	9.52	9.07	9.43
Friendliness of people	9.17	8.88	9.03	9.31	9.14	9.32
Wales overall as a place to visit	9.15	-	9.16	9.28	9.07	9.31
Attractions and places to visit	8.86	8.66	8.84	8.93	8.84	8.92
Cleanliness of the general environment	8.61	-	8.72	9.23	8.33	9.01
Overall value for money	8.53	-	8.38	8.71	8.50	8.67
Visitor information during your trip	8.50	-	8.72	8.88	8.30	8.86
Standard of tourist signposting	8.46	-	8.86	8.75	8.22	8.72
Places to eat and drink	8.37	8.26	8.41	8.45	8.30	8.49
Shopping	8.24	7.94	8.12	8.46	8.24	8.25
Sample size	1,645	2,099*	302	390	593	360

Base: all Day Visitors

*Caution: measures have changed semantically and numerically between 2009 and 2011

Table 6: Internet access while on trip mobile

	TOTAL	Region visited			
	2011	North	Mid	South	West
% having access to the internet via mobile phone/ handheld device while on trip	47%	53%	37%	49%	41%
% of with access to the internet <i>and</i> who accessed it to find out things during their trip	15%	21%	8%	16%	9%
Sample size	1,645	302	390	593	360

Base: all Day Visitors

Table 7: Source of information before the trip - Stage II data

	TOTAL		Region visited			
	2011	2009	North	Mid	South	West
Knowledge based on previous visit	54%	56%	62%	66%	48%	62%
Website	43%	11%	36%	42%	45%	44%
Advice from friends/ relatives	34%	31%	33%	39%	36%	62%
Live nearby so already knew	22%	46%	12%	13%	25%	23%
Information directly from Visit Wales office/ bureau/ TIC	16%	8%	21%	13%	15%	15%
Guides (e.g. Timeout, Lonely Planet, Rough Guide)	8%	9%	10%	3%	8%	8%
Advice or recommendation from accommodation provider	5%	-	12%	0%	4%	3%
TV, radio, cinema advertisements	2%	3%	0%	0%	4%	0%
Tour operator brochure	1%	5%	0%	3%	1%	0%
Advice or recommendation from a travel agent	1%	0%	0%	0%	1%	0%
Mobile phone application	1%	-	2%	3%	1%	0%
Other	6%	10%	0%	0%	9%	3%
Did not refer to anything before visit	9%	5%	12%	5%	8%	10%
Sample size	194	156	42*	38*	75*	39*

Base: all Day Visitors

*Caution small base

Table 8: Source of information during the trip - Stage II data

	TOTAL		Region visited			
	2011	2009	North	Mid	South	West
Leaflets at attraction/s	52%	59%	57%	47%	53%	44%
Tourist Information Centres	27%	23%	19%	24%	29%	28%
Website(s)	14%	9%	10%	3%	17%	13%
Local newspaper(s)	7%	12%	12%	11%	4%	8%
Mobile phone applications	3%	-	5%	3%	3%	5%
Other	7%	8%	10%	3%	7%	5%
Didn't use any	31%	15%	31%	34%	28%	38%
Sample size	194	156	42*	38*	75*	39*

Base: all Day Visitors

*Caution small base