

## WALES VISITOR SURVEY 2009

### DAY VISITORS REPORT *Executive Summary* April - October 2009



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## 1. INTRODUCTION AND OBJECTIVES

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In March 2009 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 2009. This replicated and updated similar surveys, conducted amongst Staying Visitors in 2000, 2001, 2003 and 2006; Day Visitors to Wales have not been researched prior to this year.

The overall aim of the study was:

**To inform the process of segmentation and visitor satisfaction by improving and building upon Visit Wales' understanding of the motivations, needs and behaviour of visitors to Wales**

The survey was conducted with both Staying Visitors as well as Day Visitors to Wales. **This executive summary report is concerned with Day Visitors to Wales** only – findings for Staying Visitors are reported separately. The definition of a Day Visitor is one who has spent three or more hours away from home, including travel, and is not in Wales for the purposes of a routine appointment, shopping, business or study. A Day Visitor to Wales can be from Wales, the rest of the UK, or from an international country<sup>1</sup>.

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<sup>1</sup> Of the 542 visitors from overseas, only 25 were Day Visitors to Wales – that is, they spent a day in Wales but stayed elsewhere in the UK.

## 2. METHODOLOGY

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The research universe 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.

The survey was undertaken by means of a **two-stage** programme of interviewing. Initially visitors were interviewed face to face (Stage I) at 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 then 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 **5,601** interviews were conducted in Stage I with **719** visitors going on to complete Stage II.

This report looks at **Day Visitors to Wales**. A total of 2,124 interviews were conducted with Day Visitors in Stage I, with 156 Day Visitors going on to complete Stage II. A separate report exists for Staying Visitors.

A full report of Day Visitors is also available.

### 3.4 Weighting the data

As a result of several local authorities buying into the project and boosting sample volumes in their areas (in particular North Wales), 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 Day and Staying Visitors to Wales at local authority level – delivering a representative sample at a Wales-wide level. The achieved volume of overseas visitors was in a similar proportion to the actual universe of overseas visitors to Wales and for this reason weighting of data for this group was not necessary: overseas visitors were instead allocated into their trip category (whether a Day Visitor or Staying Visitor to Wales) and weighted accordingly.

## 2. MAIN FINDINGS

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### TRIP PROFILES

- The single largest lifestage group was **Empty Nesters, accounting for 43%** of Day Visitors (Table 1).
- **Repeat visits form the majority of Day Visits:** 90% of Day Visitors to Wales were on a repeat visit, with nearly a third of those who were on a repeat visit have been to Wales/ that area of Wales 20 or more times in the last year (Figure 2).
- **History/ heritage is the most-mentioned reason** for a day trip to/ in Wales, while amongst Visitors from the UK (excluding Wales) the principal reason for visiting is to go to the beach/ coast (Table 2).



### KEY DRIVER ANALYSIS

- For Day Visitors, as with Staying Visitors, the less tangible ***feeling of welcome and general atmosphere*** are seen as both important and high-performing elements of the Welsh-trip. In addition to this, for Day Visitors, the people-driven elements of *service received* and *friendliness of people* are also high performing and important elements (Figure 2). Together these are key drivers where Wales achieves well.
- The **tangible elements of availability and choice of tourist attractions and the quality of food** are also in this category of important and high performing elements. These are also key drivers where achievement is relatively high.
- The element **a unique cultural experience distinct to Wales** is high performing as well as a strong influence on trip satisfaction (it is the second most highly rated element). This is primarily driven by the high proportions of Day Visitors in the sample who are from Wales: this group rate this element as more highly performing compared to UK Day Visitors to Wales.

## RATINGS

- Over a third (36%) rated their trip as *excellent* in terms of giving them a **distinct Welsh experience**. This is particularly so for Day Visitors from Wales (39%) compared to those from the UK (26%). The mean score was 4.2. (Figure 3).
- **Ratings for Wales overall as a trip destination are high:** 62% of Day Visitors rate Wales *excellent* with a further 29% rating it *very good*. For over half of all Day Visitors Wales is either *much* or *slightly better* than other holiday destinations. The mean score is 4.5 (Figure 4).
- Even with high levels of familiarity **Wales still delivers a good holiday experience:** although 90% of Day Visitors were on a repeat visit to Wales, 26% said their visit was *much better than expected* and a further 27% said it was a *little better than expected* (Figure 5).
- The top three most highly rated statements associated with Wales are concerned with **people-orientated themes:** *feeling of welcome, general atmosphere* and *friendliness of people* (Table 3).

## ASPECTS OF TRIP

- Just over a quarter (28%) of Day Visitors visited a food establishment because **Welsh food was on the menu**.
- **Castles/ historic sites/ stately homes were the most-mentioned attractions**, visited by 61% Day Visitors. This was followed by *nature attractions* (58%) and *museum/ art gallery* (46%) (Table 4).
- Almost all (95%) of Day Visitors were able to obtain **sufficient information prior to their visit**, with the top information sources dominated by experience and word of mouth – not surprising when taking into account the high level of repeat visits (Table 5).





## ENVIRONMENTAL ISSUES

- For a third (33%) of Day Visitors, the terms “sustainable tourism and responsible tourism” mean ***tourism that minimises the effect/ harm on the environment***. Some Day Visitors focused on the meaning of *sustainable* in a purely commercial sense (as in to encourage repeat visits) and some Day Visitors regarded the terms as *simply promotional/ advertising tools*.
- Almost a third (29%) of Day Visitors were aware of the ***Green Dragon tourism initiative*** (Table 6).
- Just over three quarters (75%) of Day Visitors claimed it was ***very important to choose a holiday destination that preserves its culture and heritage***: this is particularly pertinent given the high proportions of Day Visitors who visit for history/ heritage (Figure 6).

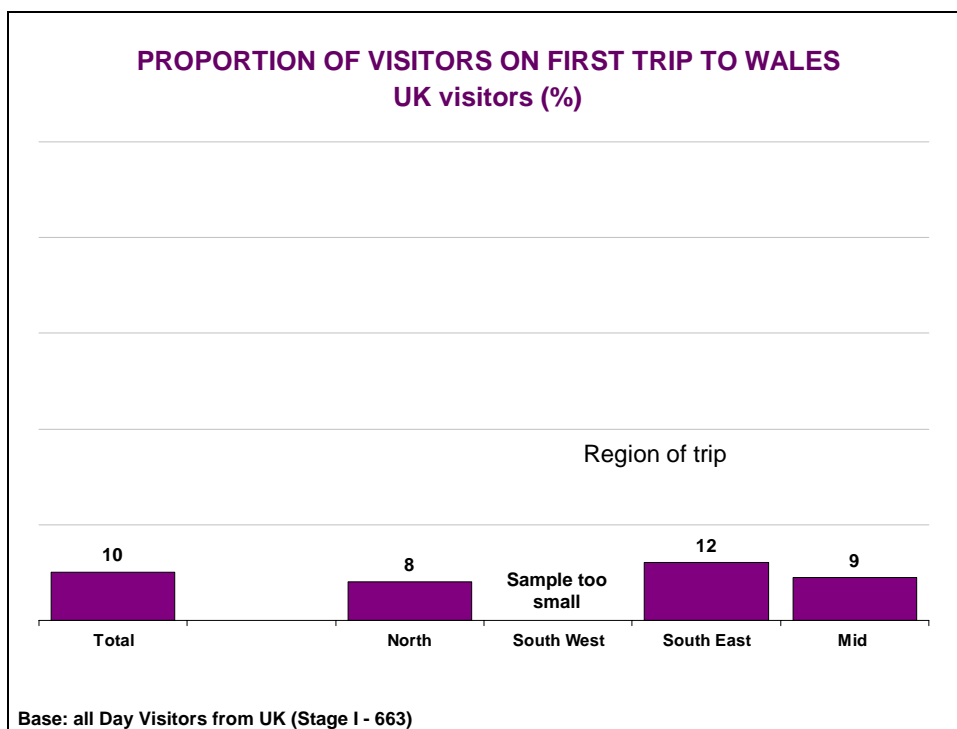
## **APPENDIX**

### Supporting charts and tables

**Table 1: Lifestage of Visitors**

Term	Description	%
Young Independents	Aged under 35 years, no children in household	11%
Older Independents	Aged 35-54, no children in household	17%
Families	Any children in household	29%
Empty Nesters	55+, no children in household	43%

**Figure 1**



**Table 2: Main reason for visiting Wales**

	Total	COUNTRY OF ORIGIN	
		Wales	Other UK
History/ heritage	10%	10%	10%
Scenery, landscape and countryside	9%	9%	10%
Sightseeing/ see attractions	8%	9%	8%
Visiting friends and relatives	6%	5%	8%
Previous leisure visit	6%	5%	11%
I wanted to visit somewhere I'd never been before	6%	6%	4%
Coast/ beaches/ seaside	6%	4%	13%
Historic sites	4%	4%	4%
Bring family/ friends/ visitors/ children	4%	5%	2%
To take part in outdoor activities	3%	3%	3%
To attend specific event	3%	4%	0%
Convenience/ easy to get to	2%	2%	2%

Base: all Day Visitors (Stage I – 2,124)

Figure 2

Drivers of Satisfaction Stage 2 Day Visitors

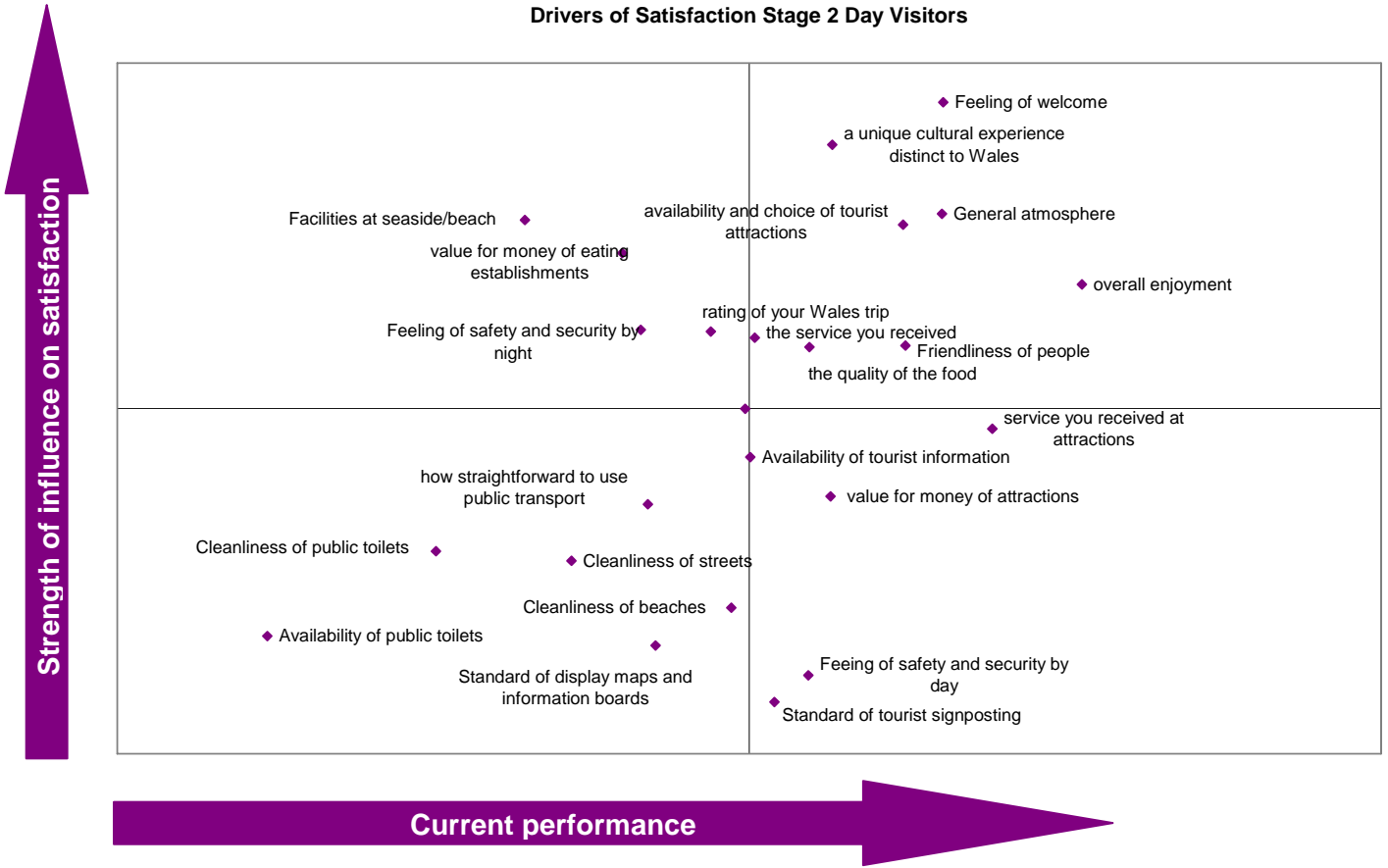


Figure 3

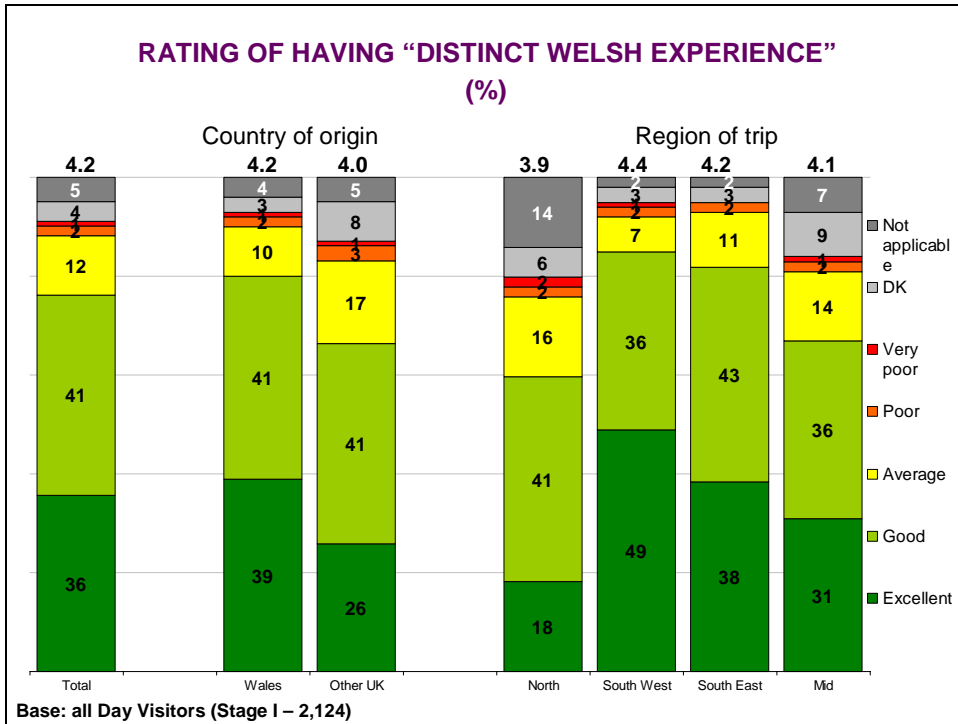


Figure 4

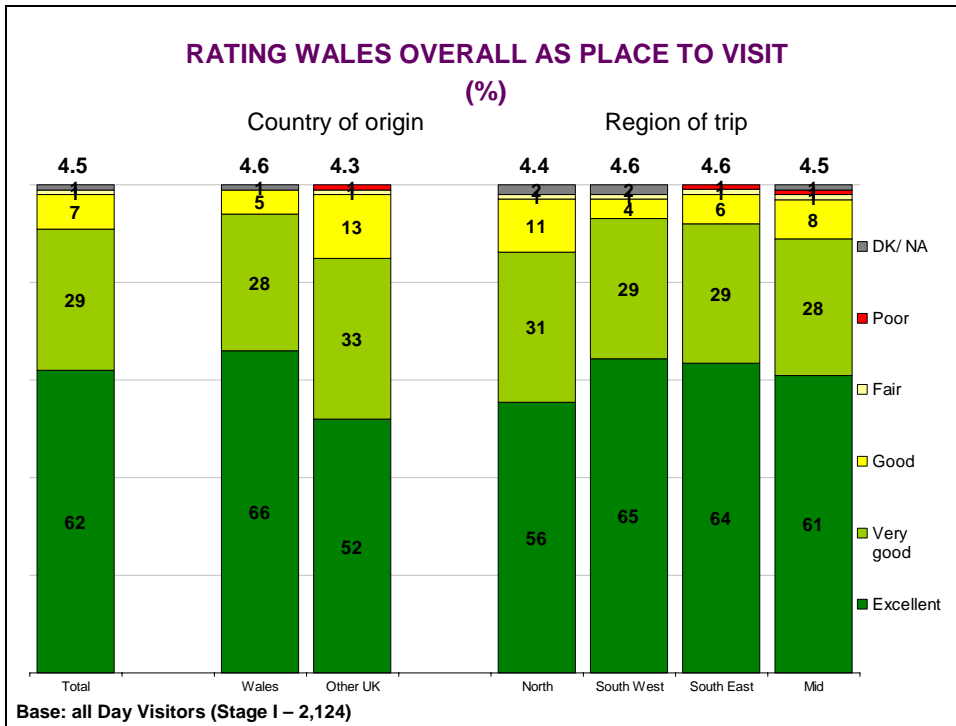
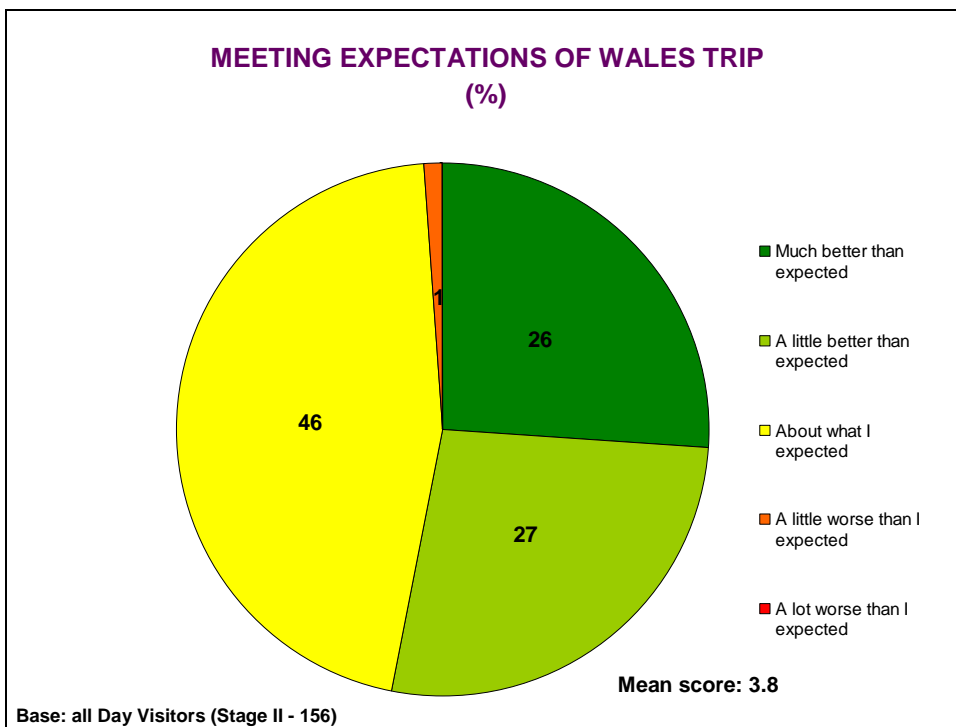


Figure 5



**Table 3 – Mean scores for statements**

	Day Visitors	Staying Visitors
Feeling of welcome	4.2	4.2
General atmosphere	4.2	4.2
Friendliness of people	4.1	4.2
Feeling of safety and security by day (from crime)	4.0	4.2
Availability of tourist information	3.9	3.9
Standard of tourist signposting	3.9	3.8
Cleanliness of beaches	3.8	4.3
Feeling of safety and security by night (from crime)	3.7	4.0
Sea water quality	3.7	4.0
Standard of display maps and information boards	3.7	3.7
Cleanliness of streets	3.5	3.9
Facilities at seaside/ beach	3.4	3.7
Cleanliness of public toilets	3.3	3.5
Availability of public toilets	3.0	3.4

Base: all Day Visitors (Stage II – 156) all Staying Visitors (Stage II - 563)

**Table 4 Types of tourist attractions visited (top mentions)**

	Day Visitors	Staying Visitors
Castles/ historic sites/ stately homes	61%	72%
Nature attraction	58%	73%
Museum/ art gallery	46%	38%
Historic slate/ coal mine/ industrial heritage	37%	37%
Leisure/ theme park	31%	40%
Festival/ theatre/ arts centre	26%	16%
Steam railway	21%	23%
Animal related attraction	14%	15%
Place of worship	9%	23%

Base: all Day Visitors (Stage II – 156) and Staying Visitors (Stage II - 563)

**Table 5 Sources of information (top mentions)**

	Day Visitors	Staying Visitors
Knowledge from previous visit	56%	60%
Live nearby	46%	5%
Advice from friends/ relatives	31%	38%
Internet (all mentions)	11%	23%
Guides (e.g. Time Out, Lonely Planet, Rough Guide etc)	9%	17%
Information from Visit Wales office/ bureau	8%	10%
Newspapers/ magazines	7%	8%
Travel feature/ programme	6%	5%
Tour operator brochure	5%	8%

Base: all Day Visitors (Stage II – 156), all Staying Visitors (Stage II - 563)



**Table 6 Heard of environmental initiatives (%)**

	Day Visitors	Staying Visitors
Green Dragon	29%	22%
Green Tourism Business Scheme	9%	3%
Bellemy	7%	8%
Green Globe	4%	3%
NONE OF THESE	56%	61%
Don't know/ not sure	4%	10%

Base: all Day Visitors (Stage II – 156) all Staying Visitors (Stage II - 563)

**Figure 6**

