

WALES VISITOR SURVEY 2009

STAYING VISITORS REPORT

Executive Summary

April - October 2009



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1. INTRODUCTION AND OBJECTIVES

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 Staying Visitors to Wales** only – findings for Day Visitors are reported separately. The definition of a Staying Visitor is one who stays at least one night *in Wales*. Thus a Staying Visitor can be from an international country¹, from the UK or indeed from Wales.

¹ Of the 542 visitors from Europe and other international countries only 25 were Day Visitors to Wales – that is they spent a day in Wales but stayed elsewhere in the UK.

2. METHODOLOGY

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 **Staying Visitors to Wales** – those that stayed at least one night *in Wales* as part of their trip. A total of 3,477 interviews were conducted with Staying Visitors in Stage I, with 563 Staying Visitors going on to complete Stage II. A separate report exists for Day Visitors.

A full report for Staying 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.

It should be noted that the previous research – referenced throughout the report where appropriate – applied quotas during the fieldwork stage to ensure a robust sample of visitors were interviewed across the four visitor origin categories (Wales, Other UK, European and Other International) rather than for the purposes of creating a representative sample of the universe of visitors to Wales. For this reason the overall sample in previous years is not truly comparable to data presented in 2009 which has been weighted to reflect this visitor universe. It should also be noted that data was not weighted in previous years.

3. MAIN FINDINGS

TRIP PROFILES

- **Short breaks were the most-mentioned type of trip**, with 45% of Staying Visitors classifying their holiday as a *short break*. Short breaks are more common in South East Wales (48%) and least in Mid Wales (42%) (see Figure 1).
- **A high proportion of UK Staying Visitors are repeat visitors** to Wales: only 14% were first-time visitors to Wales. Not surprisingly the proportion of first-time visitors from Europe (55%) and other international countries (59%) was higher (see Figure 2).
- **The choice of transport to Britain has changed slightly over time**: Cardiff airport was the choice for 9% of visitors from Europe as a means of reaching Britain – an increase since 2006 (5%). In addition the Channel Tunnel now brings in 7% of European visitors, up from 2% in 2006 (see Table 1).
- **Visiting friends and relatives** is the main reason to visit for over a third (34%) of international visitors and 26% from Europe. Visitors from Wales predominantly mention *scenery, landscape and countryside*.
- Not surprisingly, given the above point, **friends'/ relatives' homes** were the most-mentioned accommodation type amongst Staying Visitors (21%) closely mentioned by hotels (20%). Visitors to Mid Wales consistently rate paid accommodation more highly than those to other regions of Wales (see Table 2).



KEY DRIVER ANALYSIS

- The strongest drivers of Staying Visitors' satisfaction with their trip and where Wales performs well are the less tangible elements **of feeling of welcome and general atmosphere**. The more tangible areas of *availability and choice of attractions* and *overall enjoyment of attractions* are further key drivers where Wales performed well (see Figure 3).
- The element **a unique cultural experience distinct to Wales** was seen as a relatively strong driver of trip satisfaction but was not as well perceived compared to other elements, particularly among overseas and UK Staying Visitors to Wales. The expectations of UK and Overseas Staying Visitors to Wales are not met sufficiently for a *unique cultural experience*.

RATINGS

- **Over half (55%) rate Wales excellent as a place to visit** and 54% overall say Wales is either *much better* or *slightly better* compared to other holiday destinations. The mean score was 4.5 (see Figure 4).
- **The people of Wales are a positive aspect of the trip to Wales** with Staying Visitors highly rating *feeling of welcome, friendliness of people* and *general atmosphere*. These three aspects were in the top four highest rated aspects (see Table 3).
- Three in ten rated their trip as *excellent* in terms of giving them a “**unique Welsh cultural experience**” with a mean score of 4.1. (see Figure 5).

ASPECTS OF TRIP

- **Top attractions are nature attractions and castles/ stately houses/ historic sites** which were visited by 73% and 72% of Staying Visitors respectively. Overall nearly half (48%) rated the attractions of Wales as *excellent* and a further 46% rated them *good* (see Table 5).
- **Welsh food on the menu attracts Staying Visitors into restaurants** with a quarter (25%) claiming they visited an eating establishment because Welsh

food was on the menu. Those visiting the South West were more likely to claim this affected their decision to visit an eating establishment (39%) than those visiting South East Wales (17%) (see Figure 6).

- **The majority of Staying Visitors found enough information prior to their visit** with 96% say they had sufficient information and most relied on *knowledge from previous visit* – not surprising given the high proportions of repeat visits (see Table 6).
- During the visit 73% of **Staying Visitors used leaflets at attractions as an information source** and 50% used Tourist Information Centres. TICs were most used by visitors from overseas (62% used a TIC).

ENVIRONMENTAL ISSUES

- **Staying Visitors rated environmental factors important** in choosing a holiday destination: 72% rated *preserves its culture and heritage* as “very important”. The least-highly endorsed statement was *manages its carbon emissions* (see Figure 7).
- **Just under a fifth (18%) actively looked for environmentally friendly accommodation** – rising to 26% amongst overseas visitors.

APPENDIX

Supporting charts and tables

Figure 1

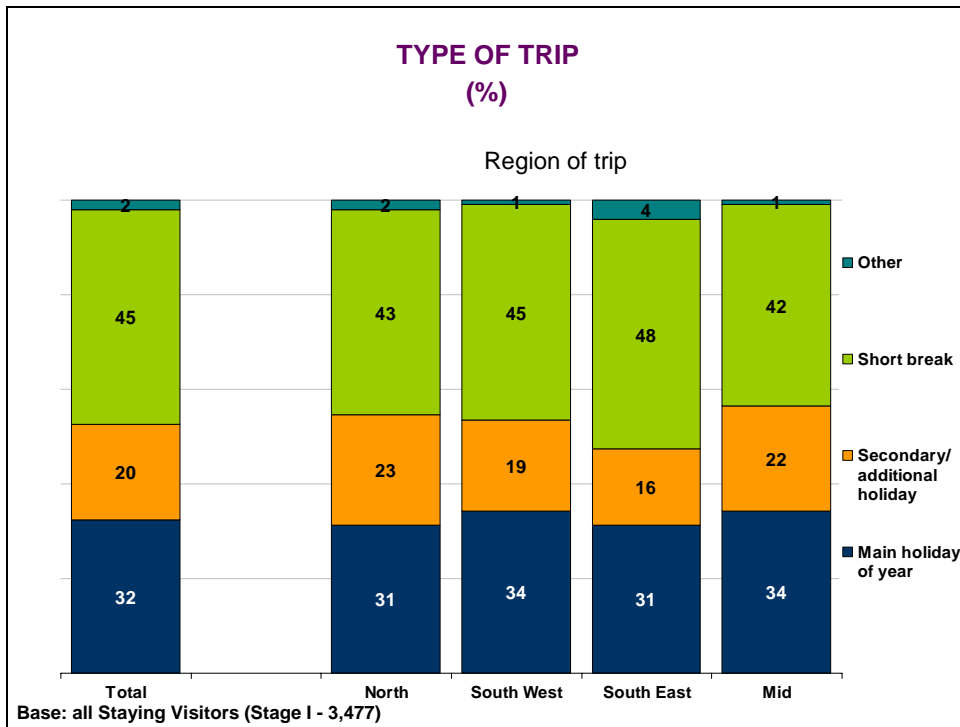


Figure 2

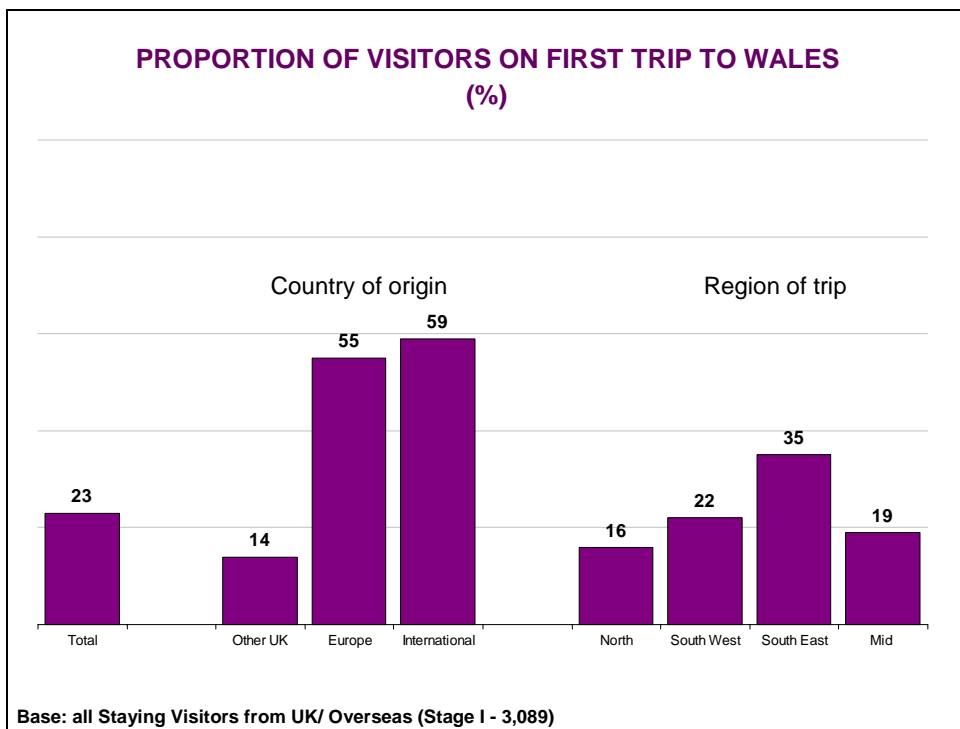


Table 1: Main method of transport used to reach Britain

	Total	COUNTRY OF ORIGIN	
		European	Other International
Train (including Channel Tunnel)	4%	7%	1%
Ferry - foot passenger	1%	2%	0%
Car ferry – South England	11%	21%	0%
Car ferry – North England	1%	1%	0%
Car ferry – Wales	3%	6%	0%
Car ferry – Other	3%	6%	1%
TOTAL CAR FERRY	18%	33%	1%
Plane - Heathrow	35%	10%	62%
Plane - Gatwick	7%	4%	11%
Plane – London (unspecified)	1%	0%	2%
Plane – Luton/ Stanstead	3%	5%	0%
Plane - Manchester	6%	4%	8%
Plane - Cardiff	5%	9%	1%
Plane - Bristol	5%	8%	1%
Plane - Birmingham	5%	6%	4%
Plane - Liverpool	2%	3%	1%
Plane – Other	6%	7%	5%
TOTAL PLANE	74%	56%	95%
Other	1%	1%	1%
Not answered	1%	1%	1%

Base: all Staying Visitors from Europe (Stage I - 302) or other international destinations (Stage I - 240)

Table 2 Accommodation type

	Total	Origin				Region of stay			
		Wales	Other UK	European	Other international	North Wales	South West Wales	South East Wales	Mid Wales
Home of friend/ relative	21%	14%	18%	28%	43%	14%	16%	35%	16%
Hotel	20%	15%	18%	24%	31%	19%	15%	29%	10%
Campsites	15%	21%	16%	11%	1%	15%	18%	6%	24%
Rented cottage/ apartment	12%	7%	15%	10%	4%	12%	18%	6%	15%
Hired caravan/ chalet	9%	17%	10%	3%	1%	13%	8%	6%	9%
Guesthouse B&B	8%	7%	7%	13%	12%	7%	11%	8%	8%
Farmhouse B&B	2%	1%	1%	2%	3%	1%	1%	1%	4%
Hostel	2%	1%	1%	4%	3%	1%	1%	3%	1%
Holiday park/ centre	1%	2%	1%	1%	0%	1%	2%	1%	1%
Other	10%	14%	11%	4%	2%	16%	8%	3%	11%

Base: all Staying Visitors (Stage I - 3,477)

Figure 3

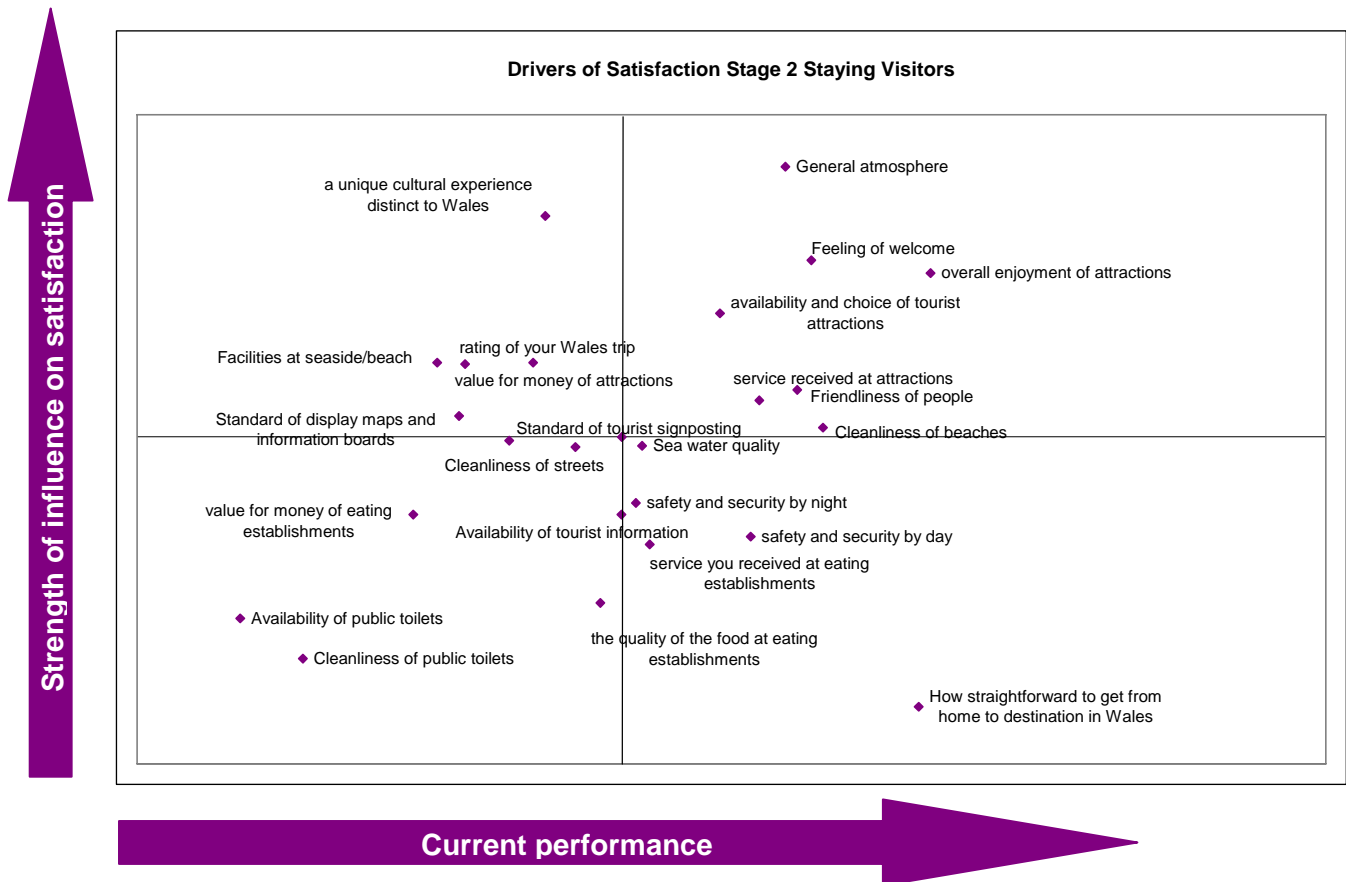


Figure 4

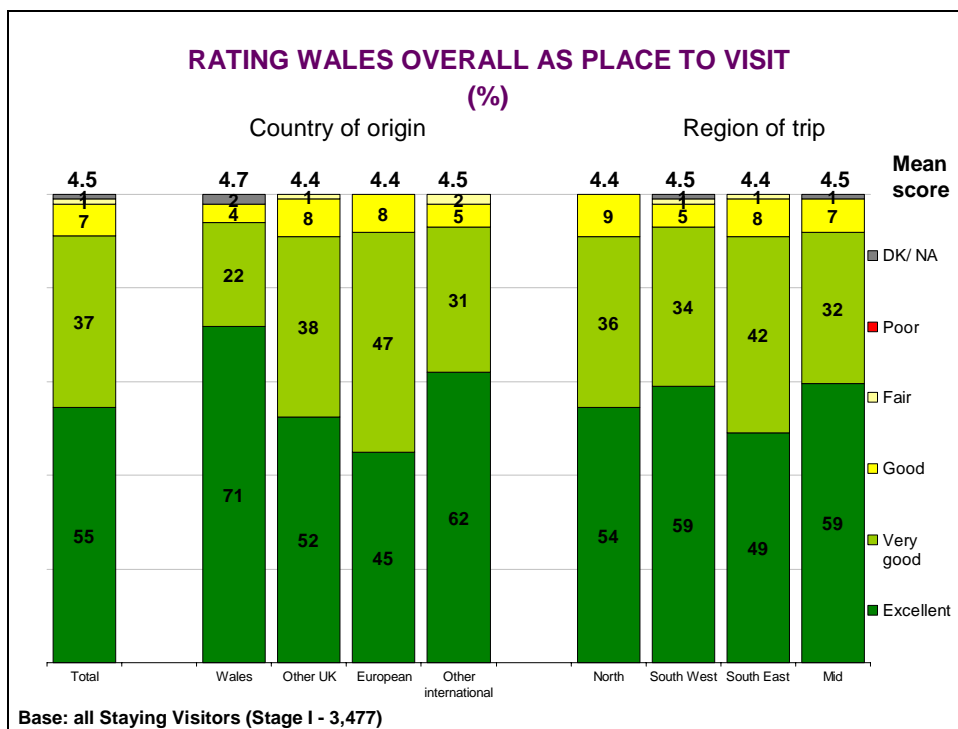


Table 3 – Mean scores for statements

	Total	Origin			Region of stay			
		Wales	Other UK	Overseas	North Wales	South West Wales	South East Wales	Mid Wales
Cleanliness of beaches	4.3	4.4	4.3	4.1	4.2	4.4	4.1	4.3
Feeling of welcome	4.2	4.2	4.2	4.3	4.2	4.4	4.1	4.3
Friendliness of people	4.2	4.1	4.2	4.2	4.1	4.4	4.2	4.3
General atmosphere	4.2	4.2	4.2	4.2	4.2	4.4	4.1	4.3
Feeling of safety and security by day (from crime)	4.2	4.3	4.1	4.3	4.1	4.2	4.1	4.2
Feeling of safety and security by night (from crime)	4.0	3.9	4.0	4.1	3.9	4.0	3.9	4.1
Sea water quality	4.0	4.2	4.0	4.0	3.7	4.3	3.9	4.1
Availability of tourist information	3.9	3.9	3.9	3.9	3.9	4.1	3.9	4.1
Cleanliness of streets	3.9	3.7	3.9	3.9	3.9	4.0	3.8	4.0
Standard of tourist signposting	3.8	4.0	3.8	3.8	3.8	3.9	3.6	3.9
Standard of display maps and information boards	3.7	3.7	3.7	3.7	3.8	3.8	3.5	3.8
Facilities at seaside/ beach	3.7	3.7	3.7	3.7	3.6	3.8	3.7	3.7
Cleanliness of public toilets	3.5	3.4	3.4	3.8	3.5	3.6	3.5	3.5
Availability of public toilets	3.4	3.0	3.4	3.7	3.4	3.4	3.4	3.4

Base: all Staying Visitors (Stage II - 563)

Figure 5

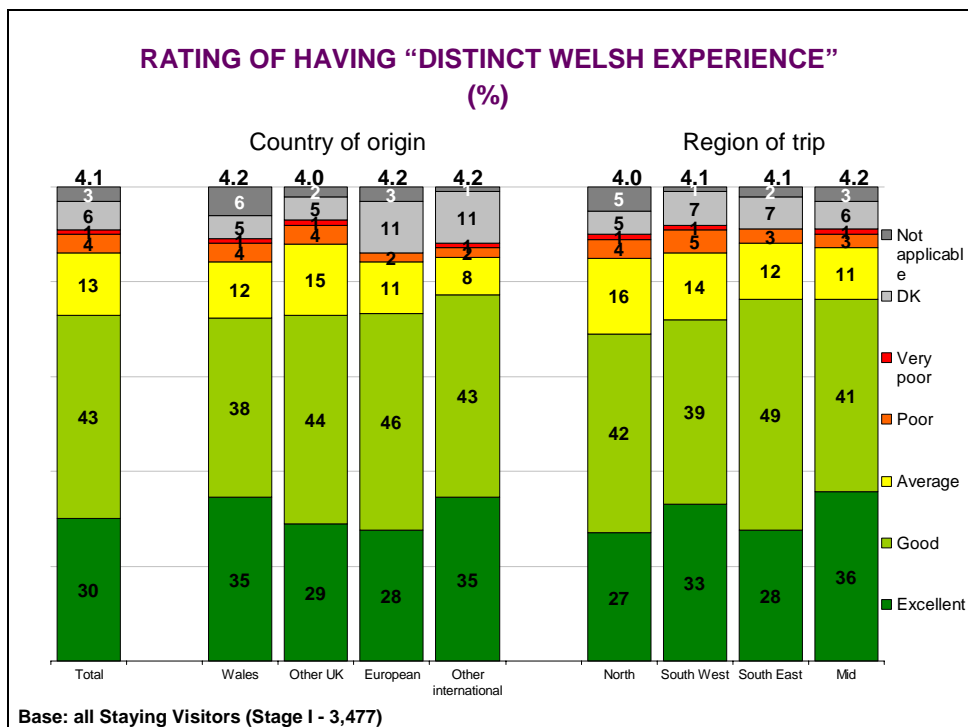


Table 5 Types of tourist attractions visited (top mentions)

	Total	Origin			Region of stay			
		Wales	Other UK	Overseas	North Wales	South West Wales	South East Wales	Mid Wales
Nature attraction	73%	73%	74%	70%	73%	87%	55%	83%
Castles/ historic sites/ stately homes	72%	51%	70%	89%	70%	70%	80%	68%
Leisure/ theme park	40%	44%	43%	26%	45%	43%	34%	32%
Museum/ art gallery	38%	21%	37%	50%	27%	44%	58%	23%
Historic slate/ coal mine/ industrial heritage	37%	24%	38%	40%	38%	31%	40%	40%
Steam railway	23%	21%	23%	27%	35%	10%	14%	32%
Place of worship	23%	28%	18%	37%	15%	37%	23%	17%
Festival/ theatre/ arts centre	16%	33%	15%	14%	17%	21%	18%	7%

Base: all Staying Visitors (Stage II - 563)

Figure 6



Table 6 Sources of information (top mentions)

	Total	Origin		
		Wales	Other UK	Overseas
Knowledge from previous visit	60%	72%	64%	41%
Advice from friends/ relatives	38%	35%	36%	45%
Internet (all mentions)	23%	19%	24%	23%
Guides (e.g. Time Out, Lonely Planet, Rough Guide etc)	17%	5%	14%	31%
Information from Visit Wales office/ bureau	10%	2%	10%	12%
Tour operator brochure	8%	5%	7%	13%
Newspapers/ magazines	8%	22%	8%	3%

Base: all Staying Visitors (Stage II - 563)

Figure 7

