Wales Visitor Survey 2006

Prepared by
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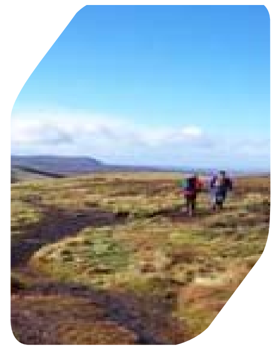
1. Executive summary

Background and Methodology



Visit Wales (formerly Wales Tourist Board) is responsible for the promotion, development and monitoring of the tourism industry in Wales and as part of this remit, undertakes regular research into the volume, value and nature of the tourism sector in Wales. To achieve their objectives, Visit Wales recognise the 'importance of understanding and responding to customer needs', as outlined in their tourism strategy document 'Achieving our Potential' (AOP)[1].

It was on this basis that in the summer of 2006, Visit Wales commissioned TNS Travel & Tourism to undertake a survey of visitors to Wales, to establish levels of satisfaction with all aspects of the visit. This was a follow-on from the UK and overseas visitor surveys conducted previously in 2001 and 2003, respectively.

The specific research objectives for this study were as follows:

- to investigate the reasons for choosing Wales as a holiday destination, including motivations, perceptions, past experiences and influences;
- to understand the behaviour of visitors during their stay in Wales;
- to identify the profile characteristics of visitors to Wales by age, lifecycle, party size and gender;
- to investigate visitor attitudes and satisfaction towards specific aspects of the Welsh holiday experience and future intentions to return to Wales;
- to compare pre-visit expectations and attitudes about Wales and the Welsh holiday product to the actual experience at the end of the holiday;
- to explore visitor attitudes towards differing types of accommodation.

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[1] www.wales.gov.uk/tourism/aop
www.cymru.gov.uk/twristiaeth/aop

The survey was undertaken by means of a programme of face-to-face interviews with a sample of visitors during their visit to Wales. Quota controls were imposed to ensure that a minimum number of interviews were completed within various different visitor markets.

The survey was split into four key segments of visitors:

Origin	**% split**
Wales	10%
Other UK	50%
European	20%
Other International	20%

Consistent with the methodology used in 2001 and 2003, visitors were contacted during their trip to Wales. Face-to-face interviews were completed with a quota of visitors at a range of sites across the country. In addition, Welsh respondents were given the option of taking part in the survey by completing a Welsh language self-completion questionnaire instead of being interviewed face-to-face. This approach ensured it was possible to survey all types of visitors whilst on an overnight trip to Wales. Visitors who were on a day trip and had not spent a night in Wales were excluded from the survey and not interviewed.

A total of 18 survey points were identified throughout Wales, covering a broad range of locations ranging from castles to seafront promenades.

In total, some 470 interviews were conducted in the period from August to September 2006, producing a robust sample with data generated from the face-to-face surveys accurate to within $\pm$4.5% at the 95% confidence level. As the survey progressed, it became clear that it would be difficult to find enough overseas visitors to interview to fill the quota. Thus, the quota targets for the overseas visitor segments were relaxed slightly in an effort to achieve as many interviews as possible within the remaining interviewing timeframe.

The main findings from the survey are summarised in the following pages.

Respondent and Trip Characteristics

Demographics

- The percentage of visitors interviewed was evenly split with 52% being male and 48% female.
- Generally, just over one-fifth of visitors were under 35 years of age (21%).
- Visitors aged 65 and over accounted for the largest proportion of those interviewed (22%).
- The 35-44 and 45-54 age brackets were closely matched, accounting for 16% and 18% of visitors, respectively.
- *European visitors*: The age profile was significantly younger than the other markets, with 45% being under 35 years of age.
- *Other International* visitors: although the largest proportion of International visitors were aged 55-64 (25%), like the European visitors, a relatively large proportion were under 35 years of age (21%), suggesting some who took part in the survey were in Wales as part of a backpacking trip.
- *Welsh* and *UK* visitors: 16% of Welsh visitors and 17% of UK visitors fell into the under 35 age bracket. These visitors were also slightly more likely to be over 65 years of age compared to the overseas visitors.
- In terms of the four lifecycle segments, the largest proportion of *Young Independents* were aged 25-34 (58%), whilst the largest proportion of those in *Families* were aged 35-44 (45%). The majority of the *Older Independents* fell into the 45-54 category (62%) and the majority of *Empty Nesters* were aged 65+ (51%).

- The age of the *Independent Explorer* varied across all age categories with the largest proportion being aged 55-64, and a smaller number aged between 45 and 54. They were slightly more likely to be in the '35 – 54' age bracket (41%) than visitors as a whole (34%), and less likely to be aged 65+ years (17% and 22%, respectively).

Lifecycle

The following lifecycle segments have been derived and are used throughout this report.

• Young Independents	Aged under 35 years, no children in household	16%
• Older Independents	Aged 35-54, no children in household	21%
• Families	Any children in household	19%
• Empty Nesters	55+, no children in household	44%

Party Composition

All respondents were asked to indicate the composition of their party who were visiting Wales.

- Across the total sample, just under two-fifths (37%) of visitors were in Wales with their spouse/ partner.
- Overall, 35% were with their family and just over one-tenth were with friends (11%).

Origin of Visitors

- Two-thirds (66%) of respondents were from the UK with 12% from Europe and 13% International overseas visitors. Just under one-tenth (9%) were Welsh residents taking an overnight trip in Wales.

- The lifecycle definitions tended to match the quota of UK and Welsh visitors. A smaller proportion of International visitors surveyed were with families on their visit.

Length of Stay

Respondents were asked to indicate how many nights they were spending away from home in total, as well as how many nights in Wales.

- The average length of stay amongst all visitors was around 6 nights (6.4 nights). Almost one-third of visitors were staying 7 to 14 nights (32%), with a further 23% staying between 4 to 6 nights.

Looking at some of the key market segments:

- *Overseas visitors*: reflecting the relatively long distance taken to travel to Wales, half of all European visitors (50%), and 41% International visitors were staying in Wales for 7 nights or more.
- *Welsh visitors*: were most likely to be spending between 2 to 6 nights in Wales (75%).
- *UK visitors*: More likely to fall in between the Welsh and overseas visitors length of stay, with the highest proportion staying 7 to 14 nights (33%).
- *Young Independents*: Most likely to stay just the shortest time period across all markets (5.0 days), 27% staying just 2 nights.
- *Older Independents, Empty Nesters* and *Families*: All more likely to stay 7 to 14 nights (31%, 35% and 37%, respectively).

Previous Visits to Wales

In order to measure the frequency of visits to Wales, respondents were asked to specify how many times they had been to the country on holiday.

- Overall, across all markets, visitors' experience of Wales varied greatly, with a similar proportion being on their first visit (21%) to those who had visited Wales more than 20 times (18%).

As would be expected, there were some variations in previous visits to Wales across the key origin markets and visitor segments:

- *UK visitors:* a high proportion had visited Wales between 2 and 6 times (37%). Slightly under one-quarter had visited more than 20 times (24%);
- *European visitors*: just over half were on their first visit to Wales (55%);
- *International visitors*: similar to European visitors, most likely to be on their first visit to Wales (61%), but a smaller proportion on their first visit in 5 years (21%); This latter figure could be explained by these International visitors returning to Wales to visit friends and family in Wales;
- *Young Independents*: most likely to be on their first visit ever (40%)
- *Independent Explorers*: most likely to have visited more than 20 times (24%)

Types of Holiday

Respondents were asked what type of trip they were taking to Wales.

- In general, just over half of all visitors (51%) were on a short break in Wales, with one-third being on their main holiday.
- A higher proportion of Empty Nesters and UK visitors were on a secondary holiday compared to the other markets (23% and 19%, respectively).

- Three-quarters of overseas visitors were on their main holiday (75%), possibly reflecting the distance travelled to Wales from their own country.

Staying in different locations

- Overall, 82% of all visitors were staying in just the one location.
- European (38%) and International visitors (46%) were most likely to be staying in more than one location, with Welsh and UK visitors least likely to be staying in more than one location (5% and 10%, respectively), suggesting that overseas visitors are more likely to want to see different parts of the country as well as reflecting the length of duration stayed, whereas domestic visitors are content to stay in one place.

Areas of Wales stayed in during holiday

Respondents were asked to indicate which areas of the country they had stayed in during their holiday.

- Amongst all visitors, the area stayed in most was North Wales with just over one-third having visited (34%).
- The next most popular area was the South West (24%). Overseas visitors were most likely to have stayed in Cardiff with 40% of European visitors and 38% of International visitors staying in the city on their trip.
- Conversely, UK visitors were most likely to have stayed in the North of the country (34%) and Welsh residents the South West (35%).

Main reasons for visiting

Visitors were asked what the main reason was for their visit to Wales.

- Overall, a quarter of all respondents indicated that the main reason for choosing to visit Wales was the scenery (25%).
- An equal amount were visiting to see friends or were visiting family (13% each), and a smaller proportion were in Wales sightseeing (11%).

Overall levels of satisfaction with visit

Providing comparable information on overall performance (TRI*M)

The TRI*M Index is a weighted calculation based on responses to the four component questions illustrated below. As the component questions are asked of all respondents, the Index is calculated for each respondent. The Index for any group is an average of the scores for all those respondents, so it can be calculated for any defined group (e.g. Older Independents, European visitors etc). The Index can be produced for all visitors from a particular market or for certain sub-segments such as International and domestic visitors and repeat and first time visitors (dependent upon sample size).

The Index is based on the following questions:

- *How would you rate your visit to Wales overall?*
- *Based on your experience, would you recommend visiting Wales for a holiday or break to friends or family?*
- *Based on your experiences on this trip, would you visit Wales again?*
- *How would you rate Wales as a destination to visit on a holiday or break compared to other holiday destinations?*

These four questions provide the TRI*M index score for overall visitor satisfaction with Wales (and the context within which all of the detailed satisfaction ratings are placed). It has been used in this report to benchmark Wales against other destinations and also to benchmark Wales' score for future comparison.

- Figure 1 overleaf shows the overall TRI*M index figure for Wales as 95, a high index that suggests overall satisfaction with the trip was very high.

TRI*M Index Questions - Wales Visitor Survey

Overall

TRI*M Index 95

1. Overall Satisfaction

Mean			
4.2	Top2-Box 83%	5=Excellent	36%
		4=Very good	47%
		3=Good	16%
	Bottom2-Box 1%	2=Fair	1%
		1=Poor	0%
		No Answer	0%

2. Recommendation

Mean			
4.7	Top2-Box 92%	5=Definitely	73%
		4=Probably yes	19%
		3=Fairly likely	6%
	Bottom2-Box 2%	2=Probably not	1%
		1=Definitely not	1%
		No Answer	0%

3. Repeat Visit

Mean			
4.3	Top2-Box 81%	5=Definitely	58%
		4=Probably yes	23%
		3=Fairly likely	11%
	Bottom2-Box 8%	2=Probably not	7%
		1=Definitely not	1%
		No Answer	0%

4. Competitive Advantage

Mean			
3.8	Top2-Box 60%	5=Very big advantage	19%
		4=Big advantage	41%
		3=Some advantage	26%
	Bottom2-Box 4%	2=Only a slight advantage	3%
		1=No advantage at all	1%
		No Answer	10%

Base 470

- The overall satisfaction data shows that the majority (83%) of visitors to Wales rate their trip very highly, with over one third claiming it was ‘excellent’ and just under half (47%) claiming their trip was ‘very good’. In addition to this high satisfaction with their trip, just under three quarters (73%) of respondents would ‘definitely’ recommend a trip to Wales with just under a fifth claiming they would ‘probably’ recommend a trip to Wales. This is a very good indicator of enjoyment of a trip and recommendations from friends and family are one of the most cited reasons for visiting a destination.

- Most of the respondents would also return to Wales for a repeat trip – over half (58%) would ‘definitely’ return for a repeat visit and just under a quarter (23%) would 'probably' return for a repeat visit. We also asked how Wales compares to other visitor destinations. Almost two thirds (60%) of the sample think Wales does have an advantage over other destinations, with almost a fifth (19%) claming Wales has a 'very big' advantage and around two fifths (41%) claiming Wales has a 'big' advantage over other destinations. One quarter of the sample (26%) see Wales as having only 'some' advantage over other destination breaks. Comparing the scores within the four quadrants, Wales scores highest on recommendation (mean score of 4.7), and lowest on competitive advantage (mean score of 3.8).

- All of the scores are very high which is encouraging and suggests people enjoy their holidays in Wales, they would highly recommend it for a holiday break to friends and family and the majority would return for another visit. However, when it comes to Wales' advantage to other destinations, they do agree Wales has some advantage but they are not as committed to this as with the other factors. Perhaps this is as a result of it being a UK destination and visitors can enjoy similar holidays elsewhere in the UK.

Summary – TRI*M Index Scores

- In summary, the TRI*M results for a visit to Wales are very encouraging and do suggest that those visitors who come to Wales for a holiday have generally high levels of satisfaction and are likely to recommend Wales to friends and family as a place for a holiday break. The reason the scores are not as high for other European and international visitors is due to the fact that these respondents are less likely to return to Wales for a repeat visit, a reflection of the fact that they live further away from Wales. Those who will rate Wales higher overall are those who live in Wales and rest of UK and those who are in the Families and Empty Nesters lifecycle segments. These scores now set a benchmark for future studies to track changes in visitor perceptions of Wales.

Rating of the Product - Accommodation

Accommodation types used

- Hotels were the most frequently used accommodation types used amongst all visitors, with just over a quarter of all the sample (26%) staying in them.
- Staying with friends and relatives and bed and breakfast accommodation were also popular (19% and 13%, respectively).
- A further one in ten (11%) stayed in rented cottages or apartments.

Across the key markets and lifecycle segments, there were some significant variations in accommodation stayed in:

- *Young Independents*: a higher proportion stayed in campsites and hostels than other key markets (19% and 11%, respectively).
- *Older Independents*: more likely to stay in a bed and breakfast than other lifecycle segments, with one-fifth (20%) staying in this type of accommodation.
- *Empty Nesters* and *Families*: were more likely to stay in hotel accommodation (30% and 25%, respectively).
- *European* and *International* visitors: overseas visitors were far more likely to stay in a hotel or bed and breakfast than domestic UK and Welsh visitors. Conversely, these overseas visitors were proportionally less likely to stay in rented cottages/ apartments than domestic visitors (just 3% for European and International visitors). A high proportion of International visitors (31%) also stated that they were staying with friends or relatives.

Booking accommodation

Visitors were asked to indicate whether or not they had booked their accommodation in advance, and if so, when, and how they had booked.

- Overall, slightly less than one-fifth (18%) did not book their accommodation until they had arrived in Wales.
- *Empty Nesters* and *Welsh* residents were most likely to pre-book all of their accommodation (84%) whilst overseas visitors were less likely to book accommodation in advance than domestic visitors.

Booking Mechanisms

- Overall, just under half of all visitors booked their accommodation directly with the establishment (47%) whilst a further one-third (33%) booked using the internet or e-mail (33%)
- There are some noticeable differences between those using the internet or e-mail to book accommodation; a high proportion of Young Independents booked using these methods (49%).
- Conversely, Empty Nesters and Welsh residents were less likely to book using the internet or e-mail (20% and 15%, respectively).
- Overseas visitors were most likely to book using a travel agent or tour operator (European visitors, 18% and 12%, and International, 12% and 15%, respectively).

Growth in pre-booking using the internet

There has been a large rise in those using the internet to pre-book accommodation since the 2001 survey. This is reflected in the survey results, with a significantly larger proportion of domestic and overseas visitors booking via this method compared with previous surveys. In the 2001 survey, just 4% of visitors booked via the internet/e-mail, compared with 33% of UK visitors surveyed in 2006. A similar increase is seen with overseas visitors - in 2003, 13% booked using this method, compared with 44% in 2006.

Levels of Satisfaction with Accommodation

Respondents were asked a series of questions relating to their experience with accommodation used during their visit to Wales:

- The quality of their accommodation
- The service received in their accommodation
- The value for money obtained in the accommodation

The results have been sorted by highest mean score.

Overall Mean Score

• Quality of accommodation	4.1
• Service received at accommodation	4.1
• Value for money of accommodation	4.0
• **Overall accommodation mean score**	**4.0**

Comparison with previous surveys (overall mean score)

• 2001	**4.3**
• 2003	**4.0**
• **2006**	**4.0**

The overall mean score for all accommodation types across all three aspects was 4.0 out of 5. This compares with 4.0 for the 2003 survey and 4.3 for the 2001 survey.

As explained in further detail in the full accommodation section of the report, these scores should be treated with caution as the sample sizes for the 2001 and 2003 surveys were much larger than in the 2006 survey.

'Value for money' with overseas visitors was the lowest aspect rated across most accommodation sectors, and would suggest that this area remains in need of most attention.

Taken as a whole, the scores suggest that satisfaction with accommodation has remained consistent since 2001. Although the overseas overall score for 2006 is slightly down on that recorded in 2003, the lower sample size in this year's survey means that this figure should be interpreted with caution.

Should tourist accommodation be legally required to meet a basic standard?

Visitors were asked whether they thought accommodation should be legally required to meet a basic standard.

- Overall, the vast majority of visitors interviewed thought that accommodation should be legally required to meet a basic standard (88%)

- Across the key origin markets and lifecycle segments, *Empty Nesters* and domestic *UK* visitors were slightly more likely to agree with the above statement (92% for both). On the other hand, *Young Independents* and overseas *European* and *International* visitors were slightly less likely to believe that a basic standard should be a legal requirement (79%, 78% and 77%, respectively).

Rating of the Product – Transport

Visitors were asked a series of questions on transport used whilst in the country.

Overseas Visitors – Arriving in Great Britain

Just over four-fifths of overseas visitors arrived by air (81%), with 18% arriving by sea, and just 1% (1 respondent) arriving via the Channel Tunnel.

Types of transport used

Visitors were asked what type of transport they had used whilst in Wales.

- The majority of visitors used a car to travel whilst in the country (67%). A smaller proportion used the train (11%).
- Of the Lifecycle segments, *Young Independents* were significantly more likely to have used the train, with a quarter doing so to travel (25%).
- Conversely, just over half (52%) of *Young Independents* used their car to travel, fewer than the other comparative Lifecycle segments. *Empty Nesters* were more likely to have relied on a coach trip/tour to travel (16%) than the other segments.
- As might be expected, there is a clear difference between domestic *UK* and *Welsh* visitors and those travelling from overseas in transport requirements. Domestic visitors are far more reliant on their own, or a borrowed car, as opposed to overseas visitors who are much more likely to have used public transport. In common with *Young Independents*, overseas European and International visitors were more likely to be on a walking trip comparative to the other key markets (18%, 17% and 15%, respectively).

Level of Satisfaction with transport

Overall Mean Scores for Transport	2001	2003	2006
	3.8	3.8	3.8

As can be seen from the above scores, the overall mean score for transport has remained consistent since 2001.

Within this section of the report, we have sub-divided the results for each of the following aspects of transport:

- Car parking
- Public buses
- Coach tours
- Train/railway stations

Although there were more transport types asked about in the 2006 survey, the sample size was insufficient for us to report the satisfaction ratings of those visitors who had used boat/ferry terminals and airports.

Overall Mean Scores by Transport type	2001	2003	2006
• Coach Tours	4.2	4.2	4.2
• Car Parking	3.7	3.4	3.8
• Public Buses	3.8	3.7	3.8
• Trains and Railway stations	3.6	3.6	3.6

Comparing the mean scores for the key transport types across the three surveys, the scores have remained very consistent, with car parking showing a slight improvement overall.

Visitors were asked how straightforward they found travelling around Wales in general.

- In general, just under half of all visitors (48%) thought that it was *very* straightforward to travel around Wales. A further 42% thought that it was *quite* straightforward, with a smaller amount thinking it was *not very* straightforward (7%).

Rating of the Product – Things to Do

Visitors were asked what activities they had undertaken and which visitor attractions, if any, they had visited on their trip.

- The most popular activity overall was eating out and/or visiting bars/clubs (54%). A high number of visitors also took part in general sightseeing and touring, visiting historical buildings and heritage attractions and shopping.

There were some variations across the main origin markets and lifecycle segments:

- *Young Independents*: were more likely to eat out, visit bars and go clubbing at night time (78% in total).
- *International visitors*: more likely than other visitors to participate in general sightseeing and touring (61%), and visiting historical buildings and heritage attractions (69%). W*elsh* visitors were far less likely to visit these attractions, with just 37% taking part in general sightseeing and touring, and 30% visiting historical buildings and heritage attractions.
- *European visitors*: a slightly higher proportion visited parks/gardens (36%) and churches/cathedrals (26%) than the other key markets.

Level of satisfaction with visitor attractions

Respondents were asked to state their levels of satisfaction with the range of different tourist attractions visited.

Overall Mean Scores for levels of satisfaction

	2001	2003	2006
• The overall score for visitor attractions is:	4.1	4.2	4.1
• The overall individual score of UK visitors is:			4.1
• The overall individual score of overseas visitors is:			4.1

- As in the previous surveys, the overall mean score for visitor attractions tends to be higher than for accommodation or transport. The overall figure for 2006 of 4.1 out of 5 reflects well in comparison to previous surveys.

- Overall, nature attractions scored very highly for all three satisfaction ratings (4.4 out of 5 for availability and choice and overall enjoyment, and 4.3 out of 5 for value for money). Castles, historic sites and stately homes scored highly for availability and choice (4.4 out of 5), but slightly less well for overall enjoyment and value for money (4.3 and 4.1, respectively). Steam railways were another attraction that scored highly for availability and choice and overall enjoyment (4.3 for both), but relatively poorly for value for money (3.9 out of 5).

When analysing the scores of visitor attractions across the origin market and lifecycle segments, there are some notable variations:

- *Independent Explorers*: likely to rate Castles/historic sites/stately homes and beach/seaside more highly than other segments (4.4 and 4.4, respectively);

- *Families*: rated animal related attractions (wildlife parks/zoos) slightly more highly than other lifecycle segments (4.3) compared to overall score of 4.0;
- *Welsh* visitors: scored lower for Steam railways than other markets (3.9), but scored more highly for festivals/theatre and arts (4.5) and places of worship (4.6).
- Overall, nature attractions were the most highly rated visitor attraction (4.4). The highest mean scores for attractions visited were from the *Independent Explorers* (4.3). Overseas mean scores are not truly representative due to the low sample size.
- Generally, things to do in Wales were rated fairly highly among visitors, particularly in terms of enjoyment value. Value for money, which was criticised in the previous surveys, has shown an improvement in comparison with the previous surveys (up to 4.1 compared with 3.9 in 2003 and 4.0 in 2001), although it still scores lower than overall enjoyment (4.2).

Rating of the Product – Eating Out

Visitors were asked:

- What they thought of the range of eating establishments in Wales
- What they thought of the quality of eating establishments in Wales

As highlighted in earlier sections of the report, respondents were asked to rate their satisfaction levels using a scoring system from 1 to 5.

	2001	**2003**	**2006**
Overall Mean Scores for Eating Out	3.9	3.7	3.9

- The overall score of 3.9 out of 5 is in line with the overall score for the 2001 survey (3.9) and also the 2003 survey (3.7). It should be taken into account that these previous surveys included a larger sample size, and also asked visitors to rate each type of eating establishment visited specifically (e.g. restaurants, pubs etc) instead of generally, but nonetheless, the results are comparative and suggest that visitors' satisfaction ratings of eating establishments have remained consistent over the last five years.
- Of the key origin markets and lifecycle segments, *Families* (3.7 out of 5) and *European visitors* (3.8 out of 5) were slightly less satisfied with their dining experiences while visiting Wales.
- When analysing the mean scores by locations stayed in, Cardiff scored slightly higher (4.0 out of 5) compared with other locations (all 3.9 out of 5) for the range of the eating establishments. However, the mean score for the *quality* of dining establishments was the same for all areas (3.9 out of 5).

Rating of the Product – Miscellaneous

Respondents were asked to indicate how satisfied they had been with some other aspects of their trip to Wales which do not fall into any other area of the report.

- Cleanliness in towns and cities;
- Cleanliness in the countryside;
- Cleanliness and condition of beaches;
- Public toilets;
- The welcome, courtesy and friendliness of local residents.

The results are very similar to those found in the 2001 and 2003 surveys.

	2001	2003	2006
• Friendliness of the people	4.2	4.5	4.3
• Levels of cleanliness in streets	3.9	3.8	4.0
• Cleanliness of public toilets	3.3	3.6	3.6

- The 'friendliness of the people' score (4.3) falls in between that recorded in 2001 (4.2) and 2003 (4.5).
- The score for levels of cleanliness in the streets for UK visitors (4.0) is a slight improvement on the 2001 survey (3.9), and a small improvement can also be seen from overseas visitors in comparison to the 2003 survey (3.9 out of 5, up from 3.8 in 2003).
- Again, there has been a small improvement in the perception of the cleanliness of public toilets with UK visitors comparative to the 2001 survey findings (3.6 out of 5, up from 3.3 in 2001), although there is no change in the scores given from overseas visitors (3.6 for the 2003 and 2006 survey) for public toilets.
- The features with the highest scores have consistent ratings across all of the different key origin markets and lifecycles segments, with the exception of 'friendliness of the people'. For this particular aspect, the highest mean scores were from overseas visitors (4.4 for European and 4.5 for International visitors, respectively).
- The lowest score was from the *Older Independents* lifecycle segment (4.1) and UK visitors (4.2).
- Cardiff had slightly lower mean scores in comparison with the other locations stayed in, which may reflect the urban challenges of a major city compared to more rural areas.

Marketing Sources and Information

Influences on decision to visit Wales

Respondents were presented with a list of marketing and information sources and asked to indicate which, if any, had influenced their decision to visit Wales.

- One third (32%) of all visitors used the internet to access information prior to their visit to Wales. Knowledge based on previous experience and advice from friends and relatives accounted for the other large proportion of answers given (26% and 19%, respectively).

Rise in use of internet as information tool

- Given the advances in technology since the previous surveys, it is perhaps not surprising that there has been a significant rise in the use of the internet to access information.
- Nearly half (45%) of overseas visitors accessed the internet for information prior to their visit, compared with 7% in 2003.
- The 2001 UK survey did not have ‘internet websites’ as a direct answer option (‘other unmanned information points’ was the nearest definition) so a direct comparison cannot be made between the two surveys.
- The significant difference in the overseas research findings would indicate this information source has seen the largest growth.

As described in the accommodation research findings, there has also been a significant increase in visitors pre-booking accommodation on the internet. Across the different market origins and lifecycle segments, there were some notable variations:

- *Young Independents* and *European* visitors: significantly more likely to use the internet than other lifecycle segments (56% and 48%, respectively);
- *Welsh* visitors and *Empty Nesters*: significantly less likely than other market sectors to use the internet (14% and 19%, respectively);
- *International* visitors: a higher proportion are more likely to have been given advice from friend and relatives (28%);
- *European* visitors: proportionally slightly more likely to have used information from Visit Wales office (16%);
- *Welsh* visitors: just under half (47%) stated that they were more likely to use knowledge based on previous experience, significantly higher than the other key segments.

Prices

Pre-visit price expectations

Overseas European and International visitors were asked how they thought prices in Wales would compare with those in their home country.

- Prior to their visit, just over four-fifths of overseas visitors expected prices in Wales to be higher than those in their own country (81%).
- A far smaller proportion (15%) thought the prices would be about the same. Since the 2003 survey, there has been a 16% rise in those who thought that prices would be higher than in their own country.
- Clearly, this is an important issue as it impacts on Wales' positioning regarding its competitive positioning when international travellers are deciding on holiday destinations.
- A larger proportion of *Families* thought that the prices would be lower than their own country (11%), but caution should be applied due to the relatively low sample size.

Conclusions

- Overall, the research findings are consistent with those recorded in 2001 and 2003, with the majority of visitors interviewed enjoying a very positive experience during their visit to Wales.
- The overall TR*M index figure for Wales is 95. This index varies significantly by segment, illustrating the variable levels of satisfaction across the range of markets.
- Across the four key TR*M questions, Wales scores highest on recommendation, and lowest on competitive advantage.
- Across the four key product areas rated in this survey (accommodation, transport, eating out and things to do), transport and eating out received the lowest levels of satisfaction.
- The scores for these four areas were consistent with the two previous surveys, in most cases eliciting an identical score or a rating with just a 0.1 point difference.
- Visitors defined as *Independent Explorers* expressed relatively high levels of satisfaction with their visit, which would seem to suggest an ideal marketing opportunity among this group.
- There has been a significant rise in visitors using the internet to pre-book accommodation and as an information tool since the last surveys. It clearly identifies an opportunity to target potential visitors, both domestic and overseas using this medium.
- Visitor loyalty and retention scores are encouragingly high, with many visitors stating they would recommend Wales to friends and family and return in the future.
- Value for money remains a concern for both accommodation and things to do, with findings remaining consistent with previous surveys.