

Visit Wales Off-Peak Visitor Survey 2013/14

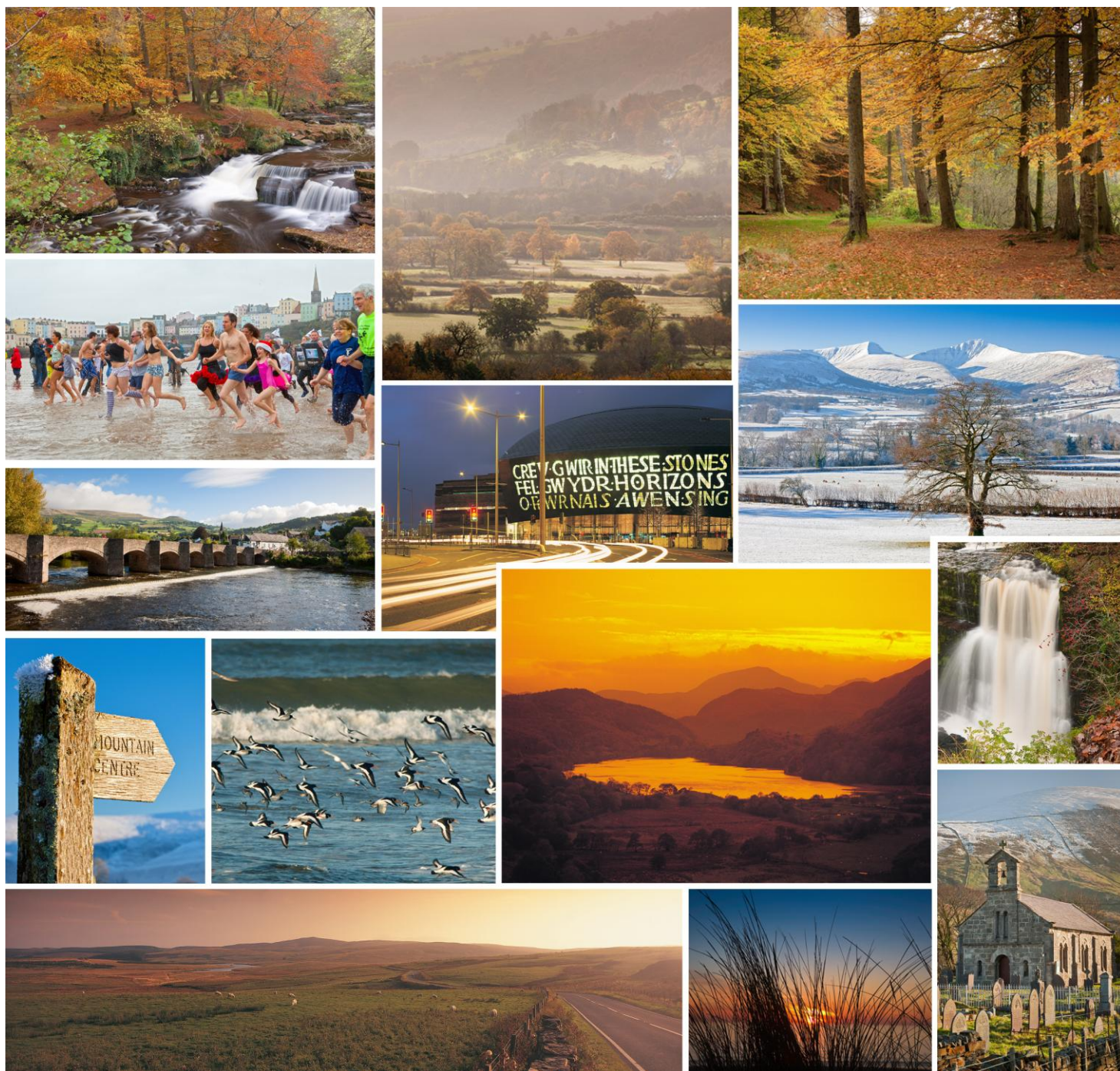
Day Visitors



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**Visit Wales Off-Peak Visitor Survey 2013/14
Day Visitors**

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

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1. Background and Methodology

What is the Wales Off-Peak Visitor Survey?

- 1.1 Visit Wales conducts a survey of visitors to Wales during their trip approximately every two years. Visitors are categorised into three specific markets: UK Staying, Day and Overseas.
- 1.2 The main objectives of the survey are to understand in more detail the profile of visitors to Wales, satisfaction with visit, motivation for visiting and accommodation and transport used.
- 1.3 Until 2013 however, the survey had only been conducted during the peak season, i.e. Easter to September/October. The purpose of this off-peak survey is to understand if and how the profile and behaviour of visitors to Wales during the off-peak, i.e. October to March, differs from the peak season.

How was the Off-Peak Survey conducted?

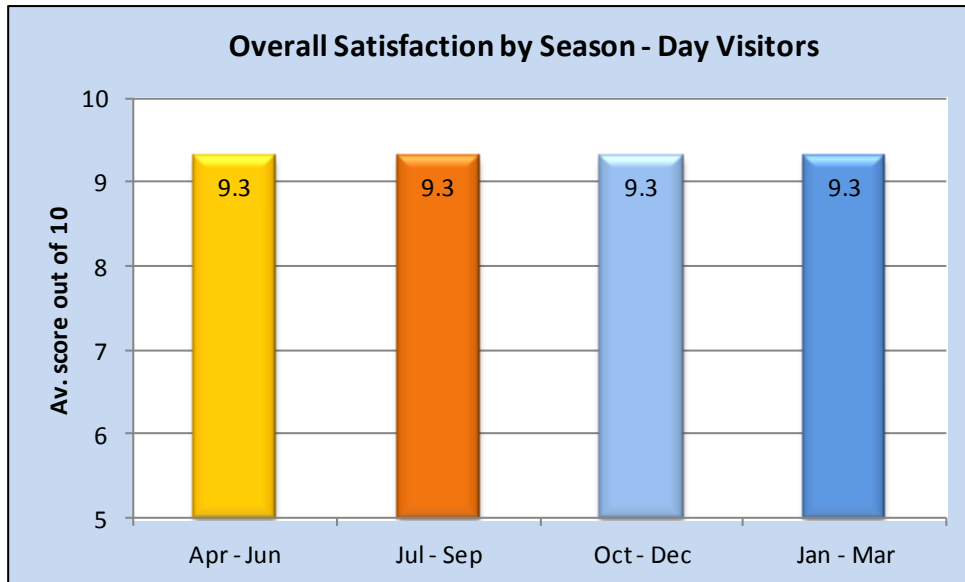
- 1.4 Face to face interviews took place at 26 sampling locations around Wales. All 26 locations were also used as sampling points in the peak season survey.
- 1.5 The breakdown in number of face to face interviews by region of Wales (i.e. where the interview took place) is shown below:

Region of Wales	No. of face to face interviews
North	312
Mid	98
South West	177
South East	415
Total	1,002

- 1.6 Interviews were conducted from October 2013 to March 2014 on a mixture of weekdays and weekends, inside and outside of school holidays.
- 1.7 This Summary looks at the results for Day visitors (535 interviews); Staying visitors are covered in a separate summary.

2. Headline Findings

High satisfaction all year round



2.1 Overall trip satisfaction ratings do not differ by season. The average rating given in every season is a high 9.3 / 10 – showing that Wales is an attractive tourist destination all year round.

No effect of the weather on day trip satisfaction

2.2 As with staying visits, day trip satisfaction ratings do not vary with the weather. The *Information Needs Research* conducted for Visit Wales in 2013 revealed that checking the weather when planning a possible day trip has a significant bearing on where the trip is taken (e.g. indoors or outdoors), or whether a trip is taken at all.

The need to get out of the house

2.3 Some people, especially families with young children, need to find things to do out of the house all year round. For such people 'peak season' and 'off-peak season' are irrelevant terms – they need to find places to visit regardless of season, weather, price or busyness.

- 2.4 This is an important difference between day trips and staying trips. Day trips are an all year round necessity for many people, whereas staying trips are only an all year round necessity for some, and reasons for staying off-peak are often specifically season-related (mainly peacefulness and lower cost).

Families with young children are an important group in the off-peak day visitor market

- 2.5 A substantial proportion (43%) of day parties are families with young children – compared to 33% peak season. This ties in with the higher representation of the 35 – 44 age group (29% of respondents) and the need to get out of the house all year round.

Enjoyment at attractions peaks in the festive month of December

- 2.6 Overall enjoyment at attractions is at its highest in the month of December, when it scores 9.6 / 10. Looking at where the highly satisfied attraction visitors were interviewed in December, it seems likely that the high satisfaction is linked to festive events which were on at that time.

Satisfaction with places to eat/drink dips after Christmas

- 2.7 Satisfaction with places to eat/drink averages a steady 8.8 for most of the year from April through to December. However it dips to 8.4 in the January to March quarter.

Events are important for bringing in visitors during the off-peak season

- 2.8 About one in five (19%) off-peak day visitors attended a specific event / performance, compared to just 3% of day visitors in peak season. Some allowance needs to be made for the fact that off-peak sampling was more targeted around scheduled event days at various locations but nevertheless, events do draw in the visitors in the off-peak. The most common examples include food fairs, Christmas fairs and Halloween events.

Museums – a popular place to be for day visitors

- 2.9 One in six (17%) day visitors have visited a museum during their trip. This is the second most common activity undertaken after themed events/fairs (18% of visitors). This is a notable finding as museums do not even feature in the top 10 activities undertaken by staying visitors.

Day visitors are more likely to be repeat visitors during off-peak than in peak season

- 2.10 Most (86%) off-peak day visitors are repeat visitors; 7% are new visitors and 7% are lapsed. This is different from the peak season, which attracted 13% new visitors.
- 2.11 The finding also differs from staying visitors, whereby there is no significant difference in the new/lapsed/repeat visitor profile between peak and off-peak.

High intentions to return

- 2.12 The vast majority (87%) of UK visitors from outside Wales say they will 'definitely' return to Wales within the next few years. This is similar to the intentions of peak season visitors from outside Wales (82% 'definitely' intend to return).