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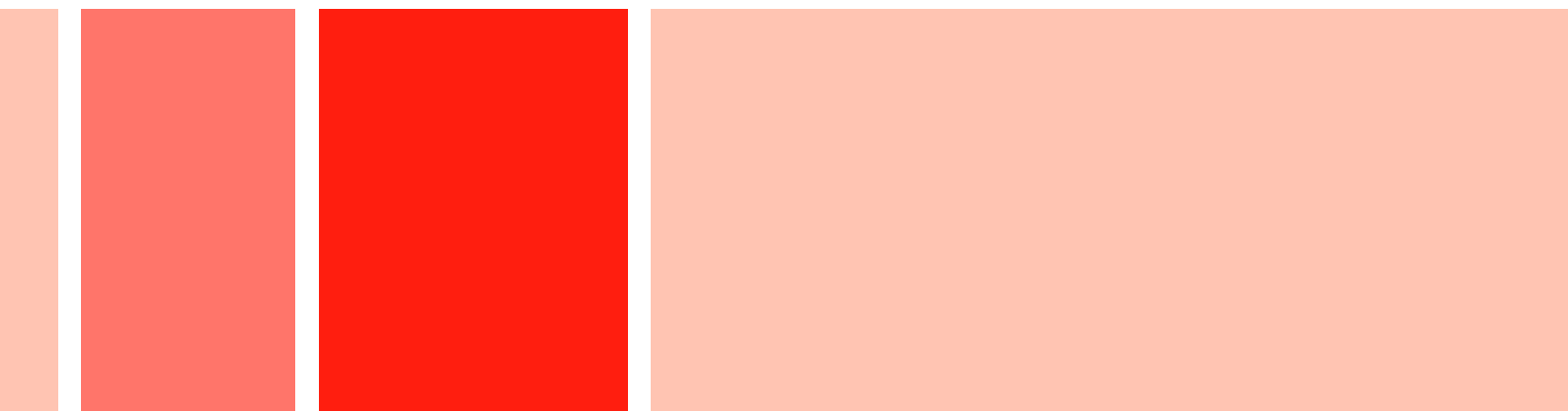


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# Wales Visitor Survey 2011

## UK Staying Visitors - Executive Summary



# **Wales Visitor Survey 2011: UK Staying 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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Welsh Government Social Research

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## 1. INTRODUCTION AND OBJECTIVES

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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 September 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 Staying Visitors to Wales only – findings for UK Day Visitors are Overseas Visitors reported separately. In addition there is a full report for UK Staying Visitors.**

## 2. METHODOLOGY

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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.

The 2009 data has been rebased, excluding Overseas Visitors to aid its comparability with 2011 data. 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

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- **The profile of UK Staying Visitors is heavily skewed towards the ABC1 demographic** (Table 1), with over two in five falling into the segment *Empty Nesters* and nearly a third into *Families* (Table 2).
- **Repeat visits account for almost three quarters of all UK Staying Visits:** highest in North Wales (81% are repeat visitors) and lowest in South Wales (68%). New Visitors account for 12% overall and Lapsed Visitors (those who have visited before but not within the last three years) account for 15% of UK Staying Visitors (Table 3).
- **Satisfaction with the trip is high:** nearly half (45%) rated Wales 10/10 for the attribute *Wales overall as a place to visit*. (Chart 1):
- **Top performing elements of the trip relate to the natural environment** and the friendliness of people. Elements that perform less well (but still perform positively) are associated with commercial tourist facilities such as shops and places to eat. (Table 8).
- **Over half have mobile internet capability :** nearly one in three UK Staying Visitors have access to and have used mobile internet to find out things during their trip. (Table 4).
- **The use of websites as information sources prior to the trip is growing:** nearly half consulted a website for information prior to their trip (up from a quarter in 2009). (Table 5).
- **During the trip leaflets at attractions and/or accommodation are the most-mentioned** sources of information with nearly three in five using these as information sources. This is followed by *TICs*: used by one third of UK Staying Visitors (highest in Mid Wales). (Table 6).
- **Mid to large hotels** are the most-mentioned accommodation type (with 17% staying in this accommodation), followed by *campsites* (12%) and *self catering cottage/ house* (11%). (Table 7).

**Table 1: Socio Economic Group - Stage I data**

	UK Profile*	Visitor type		TOTAL		Region visited			
		New/lapsed	Repeat	2011	2009	North	Mid	South	West
ABC1	<b>51%</b>	69%	67%	67%	68%	61%	70%	68%	74%
C2DE	<b>49%</b>	30%	32%	32%	32%	38%	30%	30%	25%
<b>Sample size</b>	-	<b>623</b>	<b>1,814</b>	<b>2,504</b>	<b>2,935</b>	<b>661</b>	<b>1,047</b>	<b>387</b>	<b>409</b>

Base: all Staying Visitors

\*Source: Market Research Society 2006, Occupational Groupings (6<sup>th</sup> Edition).

**Table 2: Lifestage - Stage I data**

	TOTAL		Visitor type		Wales Residents	Region visited			
	2011	2009	New/lapsed	Repeat		North	Mid	South	West
Young Independents <i>Aged under 35, no children in household</i>	9%	11%	11%	8%	12%	6%	7%	16%	7%
Older Independents <i>Aged 35-54, no children in household</i>	20%	18%	20%	19%	21%	18%	20%	23%	18%
Families <i>Any children in household</i>	30%	30%	26%	31%	26%	37%	31%	22%	26%
Empty Nesters <i>Aged 55+, no children in household</i>	42%	40%	43%	41%	41%	39%	42%	39%	50%
<b>Sample size</b>	2,463	2,935	613	1,785	432	653	1,030	376	404

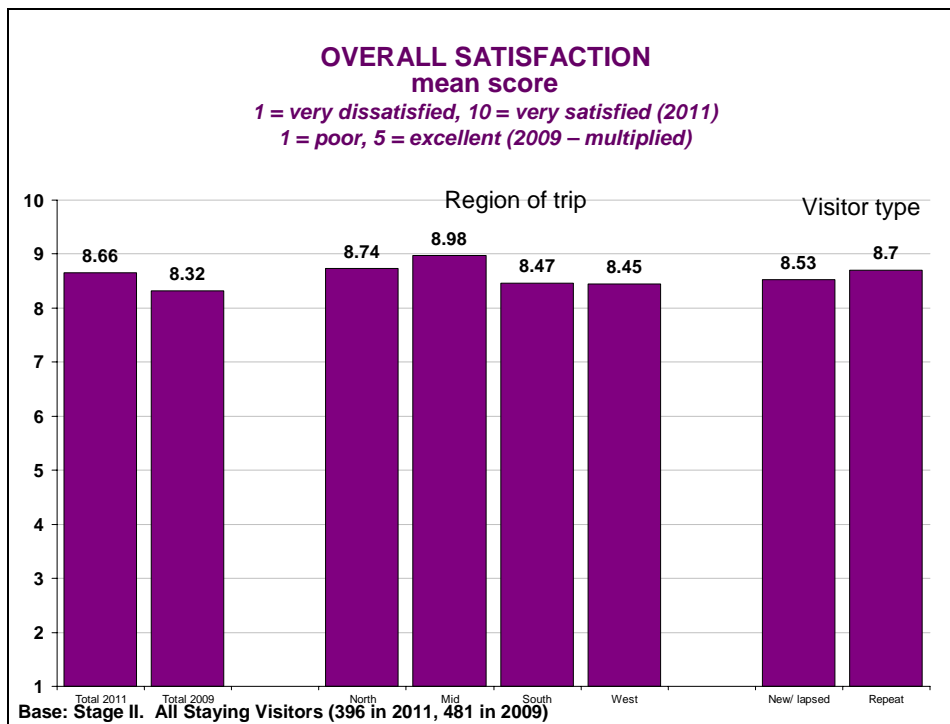
Base: all Staying Visitors

**Table 3: New/ repeat visits - Stage I data**

	TOTAL		Region visited			
	2011	2009	North	Mid	South	West
New Visitor	12%	14%	8%	12%	18%	13%
Lapsed Visitor	15%	12%	12%	15%	15%	19%
Repeat Visitor	73%	74%	81%	73%	67%	68%
<b>Sample size</b>	<b>2,437</b>	<b>2,935</b>	<b>637</b>	<b>1,027</b>	<b>373</b>	<b>400</b>

Base: all Staying Visitors

**Chart 1**



**Table 4: Internet access while on trip mobile - Stage I data**

	TOTAL	Visitor type		Region visited			
	2011	New/ lapsed	Repeat	North	Mid	South	West
% having access to the internet via mobile phone/ handheld device while on trip*	55%	51%	56%	62%	49%	55%	49%
% with access <u>and</u> who have used it during their trip	30%	30%	30%	37%	27%	27%	25%
<b>Sample size</b>	<b>2,504</b>	<b>623</b>	<b>1,814</b>	<b>661</b>	<b>1,047</b>	<b>387</b>	<b>409</b>

Base: all Staying Visitors

**Table 5: Source of information before the trip – Stage II data**

	TOTAL		Visitor type		Region visited			
	2011	2009	New/ lapsed	Repeat	North	Mid	South	West
Knowledge based on previous visit	53%	64%	38%	58%	53%	60%	51%	47%
Websites	44%	24%	44%	43%	43%	48%	47%	38%
Advice from friends/ relatives	27%	1%	28%	28%	26%	30%	35%	19%
Information directly from VW/ TIC	17%	9%	21%	15%	18%	21%	20%	9%
Live nearby so already knew	15%	5%	21%	13%	9%	10%	20%	22%
Guides (e.g. Timeout, Lonely Planet, Rough Guide)	9%	13%	5%	11%	7%	11%	12%	9%
Advice or recommendation from accommodation	7%	0%	9%	6%	4%	7%	11%	6%
Travel feature/ programme	6%	4%	5%	6%	5%	8%	5%	6%
Newspaper or magazine advertisement	4%	8%	3%	5%	4%	5%	5%	3%
Tour operator brochure	2%	6%	6%	1%	2%	2%	2%	3%
TV, radio, cinema advertisements	1%	3%	2%	1%	0%	3%	2%	0%
Advice or recommendation from travel agent	1%	0%	1%	0%	1%	1%	0%	0%
Mobile phone apps	1%	0%	1%	3%	1%	4%	4%	0%
Visit to a holiday or travel exhibition or fair	0%	2%	1%	0%	1%	0%	0%	0%
Other	5%	7%	3%	6%	2%	6%	4%	9%
Did not refer to anything pre-visit	9%	4%	11%	10%	13%	8%	7%	6%
<b>Sample size</b>	<b>396</b>	<b>481</b>	<b>97*</b>	<b>293</b>	<b>101</b>	<b>178</b>	<b>85*</b>	<b>32*</b>

Base: all Staying Visitors

Caution: question wording changes between 2009 and 2011

\*Caution: small base



**Table 6: Source of information during the trip - Stage II data**

	TOTAL		Visitor type		Region visited			
	2011	2009	New/ lapsed	Repeat	North	Mid	South	West
Leaflets at attraction/s or accommodation	58%	72%	48%	62%	51%	68%	59%	80%
Tourist Information Centres	33%	46%	32%	33%	27%	45%	34%	31%
Website(s)	18%	5%	21%	16%	20%	19%	21%	9%
Local newspaper(s)	9%	15%	6%	11%	9%	8%	5%	16%
Mobile phone applications	5%	0%	2%	6%	6%	7%	4%	3%
Directory Enquiries	1%	1%	0%	1%	0%	0%	0%	3%
Other	4%	6%	2%	5%	2%	3%	6%	6%
Didn't use any	27%	7%	31%	25%	31%	18%	24%	34%
<b>Sample size</b>	<b>396</b>	<b>481</b>	<b>97*</b>	<b>293</b>	<b>101</b>	<b>178</b>	<b>85*</b>	<b>32*</b>

Base: all Staying Visitors

\*Caution: small base

**Table 7: Type of accommodation used - Stage I data**

	TOTAL		Visitor type		Region visited			
	2011	2009	New/ lapsed	Repeat	North	Mid	South	West
Mid to large hotel (11+ rooms)	17%	19%*	25%	14%	13%	6%	34%	15%
Campsite	12%	16%	11%	12%	11%	19%	8%	12%
Self-catering in house/ cottage	11%	13%	14%	10%	9%	18%	6%	16%
Owned static caravan	10%	-	1%	13%	17%	10%	3%	7%
Home of relation	8%	11%	4%	10%	7%	6%	13%	8%
Towed caravan	7%	-	7%	7%	9%	6%	5%	6%
Home of friend	6%	8%	5%	7%	3%	6%	10%	6%
Bed and breakfast	6%	-	7%	6%	5%	5%	6%	9%
Rented/ static caravan	5%	-	6%	4%	11%	2%	0%	3%
Hired caravan/ chalet	4%	10%	5%	5%	4%	6%	4%	3%
Small hotel (10 rooms or less)	3%	19%*	5%	3%	1%	3%	4%	6%
Guesthouse	1%	7%	1%	1%	1%	2%	1%	1%
Farmhouse	1%	1%	2%	1%	1%	1%	0%	1%
Self-catering in apartment/ flat	1%	-	2%	1%	1%	2%	1%	3%
Hostel	1%	1%	1%	1%	1%	1%	1%	0%
Holiday park/ centre (not in caravan)	1%	1%	2%	1%	2%	1%	0%	1%
Other	4%	11%	3%	4%	5%	5%	1%	4%
<b>Sample size</b>	<b>2,504</b>	<b>2,935</b>	<b>623</b>	<b>1,814</b>	<b>661</b>	<b>1,047</b>	<b>387</b>	<b>409</b>

Base: all Staying Visitors

\*Hotel not split into large/ small in 2009 survey therefore same value of 19% shown in both categories.

**Table 8: Mean scores – satisfaction with trip dimensions (during the visit) - Stage I data**

	TOTAL		Visitor type		Region visited			
	2011	2009	New/lapsed	Repeat	North	Mid	South	West
Quality of the natural environment	9.33	-	9.28	9.35	9.25	9.51	9.15	9.48
Friendliness of people	9.17	8.86	9.23	9.14	8.98	9.22	9.33	9.22
<b>Wales overall as a place to visit</b>	<b>9.05</b>	-	<b>8.85</b>	<b>9.12</b>	<b>8.93</b>	<b>9.15</b>	<b>9.07</b>	<b>9.14</b>
Cleanliness of the general environment	8.89	-	8.90	8.89	8.75	9.14	8.79	9.02
Attractions and places to visit	8.74	8.60	8.69	8.76	8.68	8.76	8.86	8.70
Visitor information during your trip	8.62	-	8.47	8.68	8.56	8.80	8.50	8.67
Standard of tourist signposting	8.43	-	8.30	8.49	8.48	8.66	8.31	8.29
Overall value for money	8.41	-	8.33	8.45	8.36	8.54	8.39	8.39
Shopping	8.27	7.60	8.15	8.32	8.19	8.03	8.61	8.18
Places to eat and drink	8.26	8.08	8.29	8.24	8.07	8.24	8.54	8.25
<b>Sample size</b>	<b>2,504</b>	<b>2,935</b>	<b>623</b>	<b>1,814</b>	<b>661</b>	<b>1,047</b>	<b>387</b>	<b>409</b>

Base: all Staying Visitors

Caution: ratings scales have changed between 2009 and 2011.