



Llywodraeth Cymru
Welsh Government

Wales Visitor Survey 2013 EXECUTIVE SUMMARY

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1. Background and Methodology

What is the Wales 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.

How was the 2013 Survey conducted?

Method 1: Face to face interviews

- 1.3 Face to face interviews took place at 56 sampling locations around Wales, consistent with previous Visitor Surveys.
- 1.4 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 | 993 |
| Mid | 343 |
| South West | 677 |
| South East | 1,310 |
| Total | 3,323 |

- 1.5 Interviews were conducted between late March and September 2013 on a mixture of weekdays and weekends, inside and outside of school holidays.

Method 2: Telephone follow-up interviews

- 1.6 We also conducted 750 follow-up interviews by telephone with a representative sample of visitors participating in the face to face survey to ask further questions.

2. Headline Findings

Satisfaction ratings are up on 2011

2.1 Overall satisfaction ratings measured during-trip are up on 2011 for all markets:

| Market | Av. overall satisfaction (out of 10) in <u>2013</u> | Av. overall satisfaction (out of 10) in <u>2011</u> |
|---------------------|--|--|
| UK Staying Visitors | 9.3 | 9.1 |
| UK Day Visitors | 9.3 | 9.2 |
| Overseas Visitors | 9.4 | 9.0 |

- 2.2 'Quality of the natural environment' is the trip aspect which receives the highest satisfaction rating – 9.5 in all three markets.
- 2.3 'Friendliness of people' is the second highest rated trip aspect in all three markets – 9.5 among Overseas visitors, and 9.4 among UK Staying and Day visitors.
- 2.4 Attractions are also highly rated (9.2 in all markets), but the commercial aspects of Wales such as 'places to eat and drink' (8.8 average) and 'shopping' (8.7 average) are not as strong.

'I didn't think it would be that good!'

- 2.5 There is a significant difference between what visitors expect before their trip, and what they end up experiencing. Two thirds (67%) of new/lapsed visitors and even four in ten (40%) repeat visitors say their trip to/in Wales was better than they expected.

Significant rise in outdoor activities

- 2.6 The motivation to take part in outdoor activities during a trip to/in Wales has risen significantly from 15% in 2011 to 30% in 2013. The dry and sunny weather this summer compared to 2011 may well have played a part in this increase.

UK visitors didn't need to go abroad to sunbathe this year

- 2.7 The beach is the most frequently mentioned specific reason for visiting Wales by quite a margin among UK Staying visitors. The beach has featured in nearly half (46%) of UK Staying trips to Wales. Visitors have enjoyed the warm sunny weather in the summer of 2013.

Castles and historic attractions are particularly interesting to overseas visitors

- 2.8 Visiting a castle or historic attraction is by far the most frequently mentioned specific reason for visiting Wales among Overseas visitors, featuring in three in five (61%) trips. Propensity to visit Wales' castles and historic attractions appears to be higher among nationalities which are not used to seeing such sites in their own country.

'Active Family Explorers' and 'Pre-family Explorers' most attracted to Wales

- 2.9 The two *Explorer* market segments are by far the most likely segments to visit Wales in comparison to the proportion of the UK population that they represent.
- 2.10 One in six (17%) UK Staying visitors to Wales are 'Pre-family Explorers', which compares to 8% of the UK population.
- 2.11 13% of UK Staying visitors to Wales are 'Active Family Explorers', which compares to 6% of the UK population.

Coming back for more

- 2.12 The vast majority (73%) of visitors from outside Wales say they will 'definitely' return to Wales within the next few years, and most of the remainder (22%) will 'probably return'.
- 2.13 Intentions not to return soon seem more likely related to circumstances (e.g. geographical distance from Wales and old age) than satisfaction because trip satisfaction ratings among those not intending to return soon are so high.

'I had a brilliant time in Wales. You should go!'

- 2.14 An extremely high proportion (96%) of visitors say they would 'definitely' recommend Wales to a friend or relative. This is consistent across all markets, regions of Wales visited and new/lapsed/repeat visitors.