

UK VISITOR INFORMATION SURVEY 1996 (Abstract)

(10th August–19th September 1996: 1,192 total sample at 9 locations; Cardiff, Brecon, Tenby, Aberystwyth, Cardigan, Barmouth, Rhyl, Llandudno, Betws-y-Coed, Caernarfon.)

Introductory Statement

The Wales Tourist Board seeks to develop and market tourism in ways which will yield the optimum economic and social benefit to the people of Wales. Implicit within the objective is the need to:

- offer high standards of product quality and of service;
- sustain and promote the culture of Wales and the Welsh language, and
- safeguard and enhance the natural and built environment.

In order to achieve its aims, the Board works in partnership with statutory agencies, local authorities, the private sector and other bodies.

Visitor Profiles

<u>Type of visit</u> 46% holiday (4+ nights) 22% day trip 12% short break (1–3 nights) 11% overseas – 2% day trip, 2% short break, 8% holiday 9% visiting friends and relatives – 1% day trip, 2% short break, 7% holiday 1% business		<u>Age range</u> 21% 25–34 20% 35–44 17% 16–24 17% 45–54 13% 55–64 11% 65+
<u>UK area of origin (89%)</u> 23% West Midlands 20% North West 20% Wales 14% South East 5% East Midlands 5% South West 5% Yorkshire/Humberside 2% East Anglia 2% North 2% Scotland 1% Ireland <u>Overseas area of origin (11%)</u> 20% USA 18% Australia 16% Germany 13% Netherlands	<u>Types of accommodation used</u> 18% guest house/B&B 17% hotel/motel 15% static caravan (hired) 12% touring caravan/camping 12% friends/relatives 9% rented flat/chalet/cottage 8% static caravan (own/borrowed) 3% holiday centre (self-catering) 1% holiday centre (food included) 1% farmhouse 1% own/second home 1% youth hostel	<u>Socio-economic</u> 32% C1 23% AB 23% C2 22% DE
<u>Present on visit</u> 71% partner 33% other adult 15% children under 5 yrs 13% children 5–10 yrs 9% children 11–15 yrs 2% children 16+ yrs	<u>Parties including children (28%)</u> 37% holiday (4+ nights) 27% short break (1–3 nights) 20% visiting friends and relatives 21% day trips 17% business 15% overseas	<u>Number in party</u> 49% 2 17% 4 13% 3 8% 6+ 7% 1 6% 5

Day trippers – tended to be regular visitors and/or lived in other parts of Wales.

Short breakers – tended to stay in serviced accommodation and often had not pre-booked.

Holidaymakers – often non-serviced accommodation with higher incidence of children/prior recent visits.

Overseas – often touring in pairs with accommodation not pre-booked.

Information Gathering (General)

Definition: Telephone calls or other information requested (verbal or written) from any information source.

33% gathered no information pre-visit or during visit.

Information gatherers pre-visit were more likely to gather information during visit.

Older visitors are more likely than young people to gather information pre-visit and less likely to gather information during visit.

Pre-visit Information Gathering

69% pre-visit gatherers felt pre-visit information played an important role in their decision to come to Wales

38% strongly

31% slightly

18% did not agree

Information gathered generally concentrated on one specific area of Wales (62%).

Each respondent appeared to collect almost all their information from one source only. Almost none was paid for.

No pre-visit information was gathered by:

94% day trippers

74% visitors from other parts of Wales

58% visiting friends and relatives (VFRs)

58% 16–34 yrs

33% visitors on longer holidays and from overseas

53% of total respondents

Respondents who had not gathered information tended not to do so owing to time constraints and/or familiarity with the area visited. Reasons given were:

29% previous experience

20% impulse decision/no time plan

18% know area well, know my way round

15% no need to plan

13% it's just a day out

Respondents who gathered information pre-visit tended to do so several months beforehand except short breakers 60% of whom planned only up to one month before travel:

44% 2–4 months

29% up to 1 month

16% 5–8 months

4% 9–12 months

The main prompts for pre-visit planning were personal recommendations from friends and relatives and the fact that respondents were already regular visitors to Wales:

39% personal recommendations, friends, relatives

37% regular thing for us, always come

9% knew we wanted to visit Wales

6% saw a newspaper advertisement

5% picked up information in travel agent

3% saw a magazine advertisement

3% editorial/article

1% saw a TV advertisement

1% TV programme

1% tourist board

0.5% saw a poster

Types of Information gathered pre-visit:

74%	specific places to stay – key
51%	general resort information – key
37%	places to visit/things to do – key
11%	events
11%	travel and transport (25% VFRs)
9%	places to eat
3%	local services

Sources of pre-visit information and satisfaction rates:

NB Figures in the second percentage column represent the number of respondents very satisfied with their main source of pre-visit information.

34%	friends and relatives/word of mouth	82%
33%	specific accommodation types	77%
15%	travel agent	100%
13%	TIC (home)	79%
11%	TIC (Wales)	100%
10%	Wales Tourist Board	68%
9%	editorial/article	88%
7%	library/bookshop	60%
5%	tour operator	100%
3%	transport operator	71%
3%	teletext	100%
2%	regional tourist offices/local authority	80%
1%	TV programme	N/A
1%	Internet	0%

Pre-visit information formats received and their effectiveness:

NB Figures in the second percentage column represent the number of respondents which felt the format most effective. Figures to the extreme right show the effectiveness ratio of each format.

47%	brochure	33%	1 : 0.7
35%	telephone	25%	1 : 0.7
31%	leaflet	10%	1 : 0.3
26%	face-to-face, verbal	17%	1 : 0.7
16%	guide book/booklet	9%	1 : 0.6
6%	letter	2%	1 : 0.3
4%	listing	1%	1 : 0.25
1%	electronic	0.4%	1 : 0.4
1%	newspaper article	1%	1 : 1

Implications

1. Each pre-visit source must be furnished with the complete range of key pre-visit information types.
2. It is crucial that they are maintained, as information gathered at this stage plays a key role in decisions to visit Wales.
3. Ensuring that visitors leave Wales with favourable impressions will increase recommendations and repeat visits in the future. (Word of mouth is a top-level pre-visit information source.)

During Visit Information Gathering

Most information is collected at the start of the visit or trip.

The sample of during visit information gatherers (564) was contacted, on average, on day 4 of the holiday. Half the sample felt that they would not be collecting any more information during the rest of their visit. A quarter were uncertain (not specifically looking for it), and 21% were planning to collect more before the end of the holiday (17% a little, 4% a lot).

Overseas visitors and those staying for longer periods tended to gather more information during visit.

No information was gathered during visit by:

- 87% day trippers
- 73% visitors from other parts of Wales
- 54% visiting friends and relatives (VFRs)
- 53% short breakers
- 50% of total respondents

Types of information gathered during visit:

- 78% places to visit/things to do – key
- 51% general region/are/resort information – key
- 32% events – key
- 30% places to eat – key
- 19% specific places to stay
- 17% travel and transport
- 9% local services

Sources of information used during visit and satisfaction rates:

NB Figures in the second percentage column represent the number of respondents very satisfied with their main source of during visit information. Figures to the third percentage column show the net increase/(decrease) in likely future use.

42%	accommodation establishment/site	64%	10%
41%	TIC (Wales)	65%	21%
21%	friends and relatives/word of mouth	70%	0%
10%	local pub	46%	22%
9%	road signs	26%	(3%)
8%	Wales Tourist Board	70%	32%
7%	local Tourist Information Point (TIP)	61%	9%
5%	local newspaper	28%	28%
4%	attraction	48%	4%
4%	transport operator	38%	9%
3%	library/bookshop	56%	25%

Formats of information gathered during visit and their effectiveness:

NB Figures in the second percentage column represent the number of respondents which felt the format most effective. Figures to the extreme right show the effectiveness ratio of each format.

77%	leaflet	43%	1 : 0.6
45%	brochure	21%	1 : 0.5
37%	face-to-face, verbal	23%	1 : 0.6
16%	guide book/booklet	10%	1 : 0.6
4%	listing	1%	1 : 0.25
2%	map	1%	1 : 0.5
1%	tourist information newspaper	1%	1 : 1
1%	road signs	1%	1 : 1
1%	telephone	0.2%	1 : 0.2
0.5%	electronic	0.2%	1 : 0.4

Lower levels of satisfaction were associated with information gathered during visit than information gathered pre-visit (particularly with road signs, local pubs, local newspapers and attractions). Visitors predicted they would make greater use of TICs, local pubs, local newspapers and libraries/bookshops in future. It is very important that developments occur for local pubs and newspapers to raise satisfaction levels. Road signs too would appear to be a particularly important consideration for improvement.

Respondents tended to gather the majority of information from one source and did not shop around. This implies an adequate supply of all types of information at each source.

75% had felt they had been able to do more during their visit than expected
30% strongly
44% slightly
9% did not agree

This is an extremely important finding and suggests that encouraging information gathering during visits in as many instances as possible would be highly beneficial to both visitors and the tourist industry in Wales.

Conclusions and Recommendations

33% had not gathered any information either pre-visit or during visit to Wales.

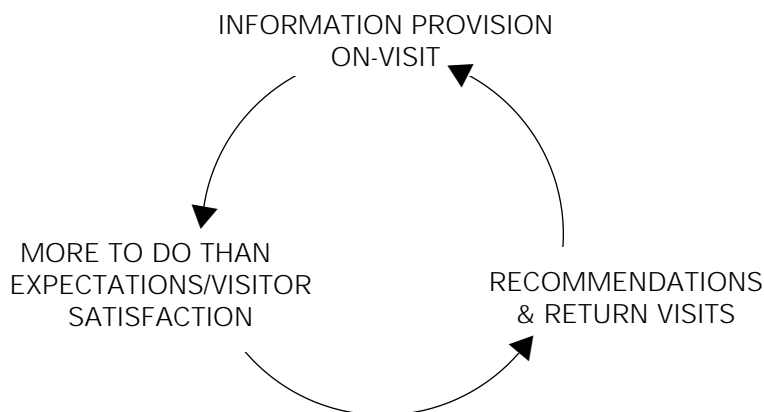
This suggests a large pool of passive or 'rut' visitors exist that do not expose themselves to information of any kind. By encouraging 'rut' visitors to gather information, especially at the beginning of their visit:

- revenue into Wales will be stimulated;
- visitors will be made more aware of and will participate in more activities, and
- their visit will be more enhanced, thus increasing the likelihood of further recommendations by word of mouth.

Revenue Expansion Model

(This model relies critically on the maintenance of information standards at the pre-visit stage and appropriate targeting during visit).

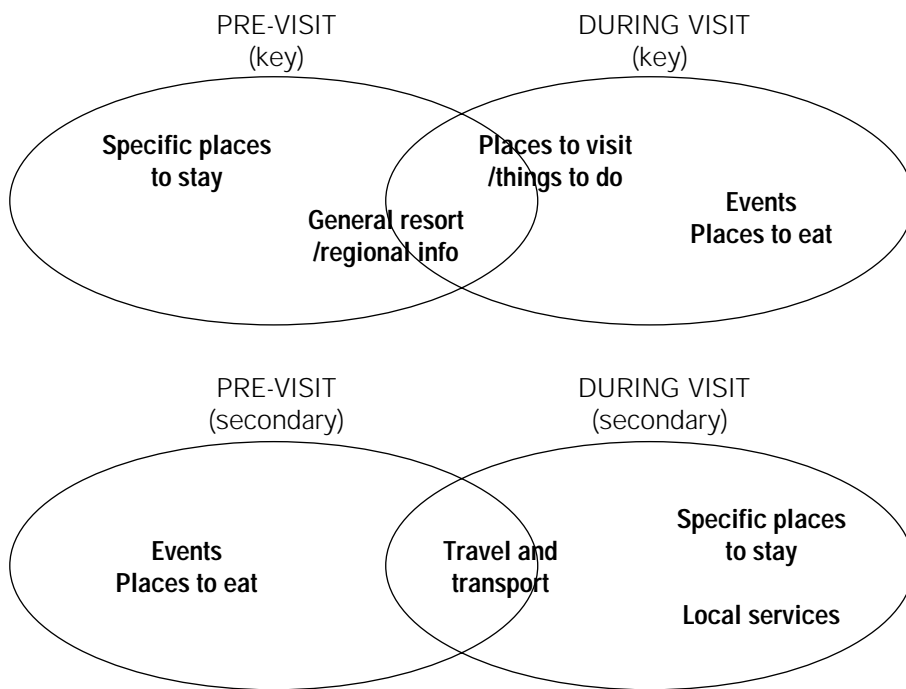
SCOPE: Currently 50% of the market.



Implications

1. Loyalty schemes may prove to be an effective method of remotivating 'rut' visitors.
2. Information packs targeted at selective visitor types (regular visitors, day trippers etc) may encourage information collection.
3. The information structure should concentrate on recognising the different demands of visitors at pre-visit and during visit stages (see below)

Information Demands of Visitors at Different Stages



4. There must be a fulfilment of the recognised need for a standard cross-section of information to be available from a wide range of different sources, as well as an effort to improve less-conventional and/or secondary information sources such as pubs, local papers and tourist road signs.
5. The gathering of information both pre-visit and during visit must be encouraged and made easy.

Unprompted Information Issues

Need a comprehensive guide book	13
Car parking information (day visitors/non-gatherers)	10
Prices on leaflets	9
Multi-language information (overseas)	9
Road signs difficult/vandalised	8
Bus/rail information	8
Signposts to places of interest	7
Improve local events advertising	6
Places to eat	6
Leaflets in Welsh confusing	6
Free leaflet pack	4
Unsure where to obtain information	4
Clearly-signposted TICs	4

Respondent Attitudes

Availability of information:

'When I was first deciding where to visit I found it difficult to know where to go for information on Wales.'

	Pre-visit gatherers	Non gatherers
Disagree strongly	50%	32%
Disagree slightly	30%	22%
Neither/nor	14%	42%
Agree slightly	4%	2%
Agree strongly	3%	2%

'I found it difficult to get the information I required during my visit, when and where i needed it.'

	During-visit gatherers	Non gatherers
Disagree strongly	50%	35%
Disagree slightly	30%	14%
Neither/nor	13%	49%
Agree slightly	5%	1%
Agree strongly	2%	1%

Effectiveness of information:

'The information I gathered before I came played a significant role in my decision to come.'

	Pre-visit gatherers
Agreed strongly	38%
Agreed slightly	31%
Did not	18%

'The information I've used since I've been here has enabled me to do more than I expected during my visit.'

	During-visit gatherers
Agreed strongly	30%
Agreed slightly	44%
Did not	9%

NOTES

1. The research appears to differentiate between information delivered (uncanvassed) as opposed to information actively 'gathered' or 'collected'.
2. It isn't clear whether 'satisfaction' with information sources is defined in terms of quality or availability, ie accessibility, of information.
3. This also begs the question as to whether sources are sufficient to meet demand and/or accessible enough to stimulate consumption.
4. Slightly lower levels of satisfaction were associated with sources which were described as not primarily tourism-associated (road signs, newspapers, transport operators). However, it is wrong surely to infer from respondents replies that newspapers referred to are not those which are tourism-associated (*This Week, Snowdonia Star, Coast to Coast* etc).
5. Under Question 12A (Card H) and Question 12B (Card D) the list includes 'Local Newspaper' which could lead to ambiguity where tourism-associated 'local newspapers' are sourced in 'Tourist Information Centres', in 'Accommodation establishments/sites' and in 'Local tourist information points' (eg Little Chefs), all of which appear on the same list.
6. Question 13A, for reasons not immediately clear, does not offer 'Local Newspaper' as a prompt, yet 'TI Newspaper' (presumably 'Tourist Information Newspaper') is shown in the response table headed 'Format of Information Gathered During Visit'. Respondents, presumably, will have written this in under 'Other'. In view of the rationale set down for tourist information newspapers based on the findings of the Wales Tourist Board's *1987 Survey of Staying and Day Visitors to Wales*, plus questions frequently asked by the industry in general and by the Wales Tourist Board in particular about their effectiveness, the researchers might have done well to take note of this valuable prompt and to have included the item in the qualitative research.

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