

# This Week

## 1999/2000 Reader Survey

including  
The Way Forward

...and a special article on  
Destination Management Systems  
'A Snapshot from the Middle of a Revolution'



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*Local Knowledge Nationwide™*

# This Week

## 1999/2000 Reader Survey

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# This Week

## 1999/2000 Reader Survey

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# This Week

## 1999/2000 Reader Survey

### INTRODUCTION

This 1999–2000 Reader Survey is the second in an ongoing series to measure the effectiveness of *This Week* **pre-visit** and **during-visit** newspapers in influencing visitors' choice, and to determine how best the publications can be developed to provide increased levels of consumer satisfaction. The first (1998) report followed on the heels of the 1996 *Visitor Information Survey* and 1997 *UK Visitor Information Research* reports published by the Wales Tourist Board to help gain a greater understanding of the pattern of information collection and consumption by visitors.

Main findings were that:

- visitors' demand for information peaks on arrival;
- leaflets and brochures were considered to be 60% effective by the 77% of respondents that had encountered them;
- tourism information newspapers were considered to be 100% effective by the 1% of respondents that had encountered them;
- maps have a major part to play in information provision;
- 75% of visitors felt they had been able to do more during their visit than expected, and
- **during-visit** information provision has important implications for return visit decisions.

These findings signalled the need for increased marketing investment in the immediate **pre-visit** and **during-visit** phases of the purchase cycle and, in 1998, *This Week* Wales carried out a wide review of academic research on information gathering by visitors prior to submitting proposals for new investment in these areas. The findings contributed to much of the activity described in this 1999/2000 Reader Survey report and helped inform the new media developments described under 'The Way Forward' on page 12.

The same findings are revisited on page 27 in a report entitled 'A Snapshot from the Middle of a Revolution'; this time reminding us that the basic rules of marketing and communication should not be overlooked amidst all the hype about the Internet, new media and e-commerce.

### BACKGROUND

The *This Week* visitor newspaper was first published in 1989 following research based on the Wales Tourist Board's 1987 *Staying & Day Visitor Survey*. It started life in North Wales as a free, **during-visit** publication delivered to visitors at, or on their way to, their destinations. Its aim was, and still is, to reach visitors as early as possible during their stay to encourage visits to attractions and the use of other facilities. Of equal importance, it aims to influence repeat visits to Wales. Distribution is via holiday accommodation, visitor attractions, Tourist Information Centres and roadside restaurants.

In 1994, the trend towards impulse purchase short break holiday-taking encouraged the publishers, in conjunction with public transport operators, to introduce a **pre-visit** edition of the newspaper. By carrying information on visitor accommodation and additional information on travel by public transport, the new edition aimed





'...further funding was secured to promote more energetically the use of public transport as an integrated part of the total visit experience.'

to influence short break and day visit decisions in favour of Wales, and use of public transport to and at destinations. Door-to-door deliveries were made in English postcode areas known to yield visitors to Wales, and a substantial door-to-door experiment was undertaken in Ireland.

During 1994/1995, European structural funding support was used to improve the presentation of the **during-visit** edition of the newspaper by placing robust acrylic dispensers in 121 TICs and roadside restaurants in Wales. At the same time, a threefold increase in door-to-door distribution of the **pre-visit** edition took place in England and Ireland as part of a three-year marketing campaign to influence short break and day visits. Output targets of 41,000 new staying visitors (representing £1.08m of expenditure) and 205,000 new day visits (representing £1.87m of expenditure) were set for the campaign. An independent evaluation demonstrated that these outputs were achieved.

### Sustainable Tourism; Tourism & Transport

In 1995, under the campaign heading 'Sustainable Tourism; Tourism & Transport', further funding was secured to promote more energetically the use of public transport as an integrated part of the total visit experience.

The enactment of policies leading to a sustainable tourism industry in Wales has positive marketing implications for mainstream tourism operators. Whilst the ultimate aim of public transport operators is to increase revenue from fare-paying passengers, this can only be accomplished if rides are sold as part of a total visit experience. Holistic promotions carried out by transport operators therefore give mainstream tourism operators access to marketing distribution channels that they would otherwise find unaffordable. This principle has underpinned the 'Sustainable Tourism; Tourism & Transport' marketing campaign but it is important for public transport operators to know that the promotions are working in their favour too (for further details see 'General Analysis', page 6).

### Tourism Trails

In 1996 the publishers introduced the concept of 'Tourism Trails' to the campaign, using new maps designed for the twelve marketing areas of Wales. £24,000 (50%) of match funding was provided to increase the number of pages in the **pre-visit** edition from 16–24 pages to incorporate the new 'Tourism Trails' sections. 1.15 million copies were printed and distributed in 1997. The total cost of £48,000 (including match funding) for the increased number of pages represented a cost of £0.005 per additional page. Benefits of economies of scale and value for money were thus achieved across both campaigns.

The influence that 'Tourism Trails' was likely to have had, and promised to have, on public transport usage was covered in the 1998 survey; the results were encouraging. *The North Wales Staying Visitor Data Capture 1996/1997* report covering the same period registered a:

- 110% increase in the number of visitors that found out about accommodation by means that would have included newspapers;
- 20% increase in the number of visitors that had found out about their accommodation from a newspaper/magazine, and a
- 27% increase in the number of visitors that had used a train to travel to Wales.

### Supermarket distribution

In Autumn 1998, following research carried out by Stevens & Associates suggesting that supermarkets and out-of-town shopping complexes were competing with tourism attractions, a proportion of the **pre-visit** distribution of the newspaper was switched from households to supermarket outlets as an experiment in taking the fight to the competition.

100% pick-up occurred throughout the 1998 trial, and 43% of all **pre-visit** distribution in 1999/2000 was directed through supermarkets as a result. 78% of all **pre-visit** respondents to the 1999/2000 Reader Survey picked up their copy of the newspaper from a supermarket, proving the effectiveness of this distribution.

The experience of two complete marketing cycles has led the publishers to settle firmly on Tesco and Asda supermarkets as the preferred outlets and joint marketing initiatives are now planned with these major brands based on Welsh food/drink and *Taste of Wales* hospitality providers – food and drink accounts for 29% (circa £370m) of staying visitor expenditure in Wales. Targeting will be more finely tuned using postcode data captured by the Wales Tourist Board from holiday brochure requests.



*'Visitors' decisions to come, or to return to Wales are made as a result of a complex set of influences...'*

**SURVEY METHODOLOGY**

The methodology for evaluating the effectiveness of the newspaper was introduced by Rachel Papworth, an economic analyst commissioned by North Wales Tourism to carry out evaluations on several European-funded marketing campaigns sponsored by the company. In determining the methodology, primary research found greater favour than secondary research for the following reasons:

**Secondary research**

Secondary research, i.e. an examination of Wales Tourist Board figures on the number of visitors to Wales, would have led to the following problems:

- a). It would not have been possible to demonstrate cause and effect. For example, if the number of visitors to Wales were to fall over the reference period, this would not necessarily indicate that the newspapers were ineffective. The numbers of visitors might have fallen more dramatically in their absence. Conversely, if the numbers were to rise, this alone would not demonstrate that the newspapers were successful – the numbers might have risen for other reasons.
- b). Whilst tourism marketers are often slow to admit responsibility for decreases in visitor numbers, when numbers increase they are all too ready to claim that their marketing activities contributed. And, to a greater or lesser degree, they might all be right. Visitors' decisions to come, or to return to Wales are made as a result of a complex set of influences, making it difficult to determine through secondary research what influences decisions most and what influences them least.

**Primary research**

It was preferable to identify, where possible, the effectiveness of the newspapers only in terms of outputs which could be directly attributed to them. To determine, for example, the number of visitors generated by the newspapers, this necessitated undertaking primary research.

Even with primary research, it is not possible to produce precise figures as to the number of visitors generated by any one publication. As stated earlier, the decision-making process is complex. The individuals themselves are unlikely to be aware exactly which factors influence their choice of destination, activities to undertake, accommodation, length of stay etc, and the degree of influence each factor has. For the purpose of evaluation, therefore, an output was regarded as any individual stating that:

- (a) their visit to Wales was influenced by the newspapers, or
- (b) a further visit was more likely as a result of reading the newspapers.

It was decided that primary research would be essential for such evaluations, and that reader surveys would provide the best means.

**Questionnaire**

The 1998 survey was undertaken **during-visit** through printing a self-completion questionnaire in 75,000 copies in total of the 1998 Summer issues of *This Week in North Wales* and *This Week in Mid Wales*, covering a three month period. Questions were included to cover aspects of public transport usage. Responses, which were incentivised with a prize of a weekend break in Wales and facilitated by the provision of a Freepost address, had to be returned within a month of publication. 247 questionnaires were returned, representing a 1% response rate taking into account the time restriction.

The 1999/2000 survey was undertaken both **during-visit** across the whole of Wales and **pre-visit** in short break and day visit catchment areas in England and Wales. Questions were included once again to cover aspects of public transport usage. Copies of the questionnaires can be found under Appendices 5a and 5b.

Responses were facilitated by the provision of a Freepost address but were not incentivised as they had been for the 1998 survey. This obviated the need for any note of caution about skewed responses but had an inevitable effect on the rate of response. This was not high in percentage terms but nevertheless returned a sample of 316, sufficient to make the findings robust.



'78% of all pre-visit respondents to the 1999/2000 Reader Survey picked up their copy of the newspaper from a supermarket, proving the effectiveness of this distribution.'

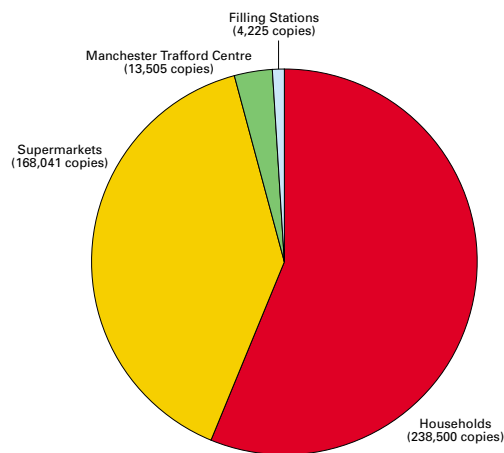
**Distribution**

550,000 copies in total of **pre-visit** and **during-visit** editions of the newspaper are published during a regular calendar year; the basic annual print output (see Appendix 2). The 1999/2000 Reader Survey covered the 20-month period January 1999–August 2000. 861,936 copies were distributed during this period to:

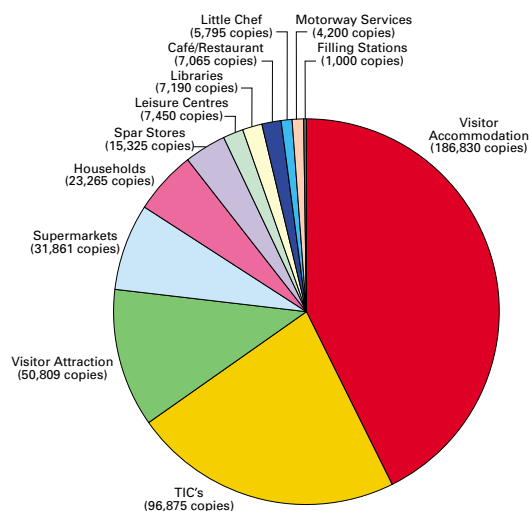
<i>Pre-visit</i>	<i>Copies</i>
Households	238,500
Supermarkets	168,041
Manchester Trafford Centre	13,505
Filling Stations	4,225
<b>Total England:</b>	<b>424,271</b>

<i>During-visit</i>	<i>Copies</i>
Visitor Accommodation	186,830
Tourist Information Centres	96,875
Visitor Attractions	50,809
Supermarkets	31,861
Households (VFR)	23,265
Spar Stores	15,325
Leisure Centres	7,450
Libraries	7,190
Cafés/Restaurants	7,065
Little Chefs	5,795
Motorway Services	4,200
Filling Stations	1,000
<b>Total Wales:</b>	<b>437,665</b>

Distribution audits show a level of takeup which supports suppositions on the number of copies read.



**Distribution; pre-visit**



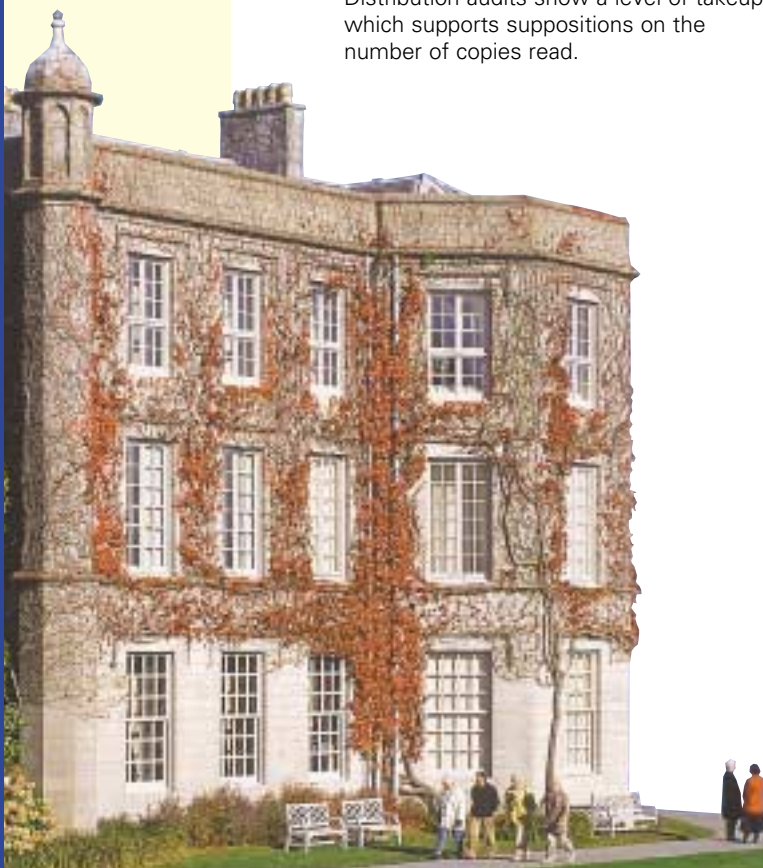
**Distribution; during-visit**

**Certification**

Distributions of all **pre-visit** and **during-visit** editions of the newspaper have been audited since 1994. The number of audited copies covering the 1999/2000 survey was 861,936.

**Readership**

Readership is estimated by applying only 50% of the basic annual print output to calculations, thus providing a x2 safety factor. The average number in group is then brought into account.



*'99% of respondents stated they had found the newspaper 'very helpful' or 'helpful' with 62% finding it 'very helpful'... 66% stated that reading the newspaper had made them more likely to return to Wales.'*

**Baselines**

**Visits and expenditure**

In 1998, UK domestic tourism accounted for 38,100,000 nights spent in Wales and £1,100M expenditure; overseas visitors accounted for 5,500,000 nights spent and £176m of expenditure (Wales Tourist Board figures), and 47,900,000 day visits were made accounting for £776m of expenditure (UK Day Visitor Survey figures). Thus the average expenditure for staying visitors based on 1998 figures was £29.27 per night (£28.87 UK domestic/£32.00 overseas) and for day visits £16.20 per day, producing a total expenditure of £2,052m.

**Jobs generated/safeguarded**

According to a DPZ Pieda 1998 report, the tourism industry in Wales accounts for 100,000 full time job equivalents.

Marketing campaigns generate jobs and safeguard jobs indirectly through generating additional visitors to Wales and their associated expenditure, which increases the demand for workers in the industry. It has been concluded that based on 1998 figures, £20,520 of visitor expenditure generates/safeguards one full time job in the tourism industry in Wales.

On the basis that if the newspaper is read by 316 people, it encourages 3,958 nights and 261 day visits to be spent in Wales, and by applying the 50% safety factor to the basic annual print output, influence is brought to bear each year on:

- 3.4m overnight stays;
- 227,000 day visits;
- £103.2m of expenditure, and
- 5,019 jobs generated/safeguarded

(1 job = £20,520 of expenditure; 3.4m nights @ £29.27av expenditure + 227,000 day visits @ £16.20av expenditure = £103.2m total expenditure.)

This is considered a satisfactory outcome against annual publishing costs of £136,000 (25p per copy) including the cost of distribution.

It was rewarding also to see evidence of the effect of supermarket distribution on newspaper pick-up and reader response (see 'Distribution' heading on opposite page and pie chart '5. Newspaper pickup; pre-visit' on page 7.)

**OVERALL FINDINGS**

The questionnaire was carried in 786,086 copies of the 861,936 newspapers distributed during the 20-month period. 316 questionnaires were returned, represented an average response rate of .04%. Respondents to the survey will have read the newspaper (rather than disposing of it unread) but there is no way of knowing what proportion of newspaper recipients this represented. It was, however, possible to 'work backwards' in drawing conclusions from the survey.

99% of the 299 respondents who answered question 6, stated they had found the newspaper 'very helpful' or 'helpful' with 62% finding it 'very helpful'. 66% of the respondent to question 7 stated that reading the newspaper had made them more likely to return to Wales.

The party sizes of those respondents who stated that reading the newspaper had made them more likely to return accounted for a total of 3,958 nights and 261 day visits spent in Wales on their latest trip. For the purposes of this evaluation, it was assumed that the next trip to Wales by these respondents would have the same number of party members and be for the same number of nights as their last trip.



'...responses to questions about tourism to Wales mirror data from other research'

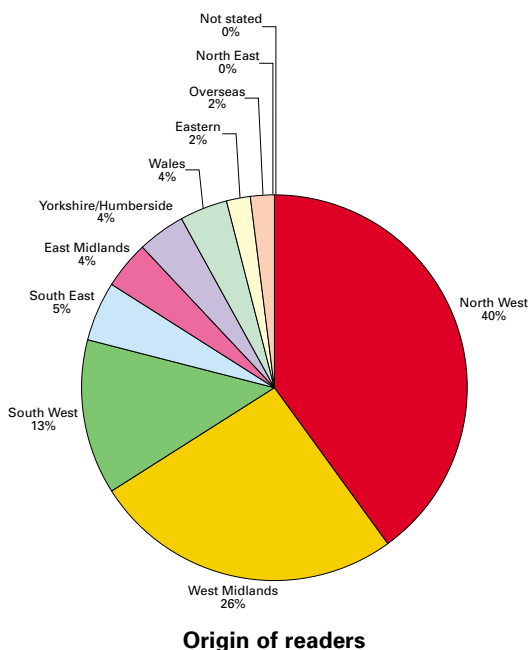
**GENERAL ANALYSIS**

(Full tabulated data can be found in Appendix 7 on pages 24/25.)

Based on 316 respondents, the charts reproduced in the survey present results that are sufficiently robust and a fairly accurate reflection of the profile of Wales visitors shown by other research. The general response questions about tourism to Wales mirror data from other research, which further verifies the overall accuracy of the survey.

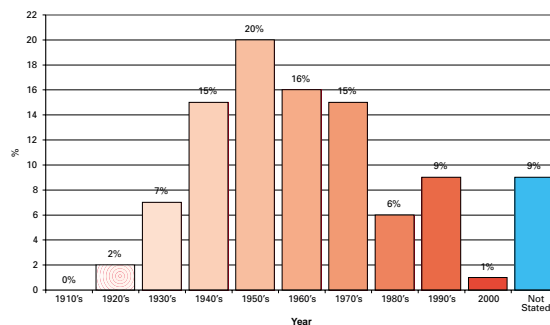
A comparison of the results of the 1999/2000 survey with those of the 1998 survey also reflect the growth trends identified by the Wales Tourist Board in day visits against short breaks and week long holidays: day visits in the survey have increased from 16% to 33%, while the other two categories have stayed roughly the same.

Additionally, the age of readers (indirectly determined by question 1: 'When did you first visit Wales?') is increasing, reflecting the ageing population, whilst repeat visits of those who first visited Wales during the last 20 years (compared with those who first visited Wales 20+ years ago) has declined by 50%, reflecting the underlying demographic changes.



**Origin of readers**

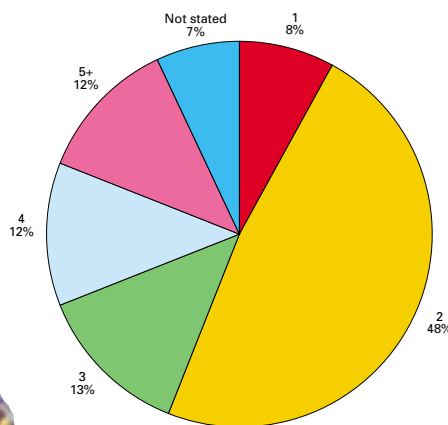
Origin of readers is largely dictated by the regions into which the newspaper is distributed. It is, nevertheless, satisfying to see that the geographic spread of survey responses mirrors the catchment areas targeted.



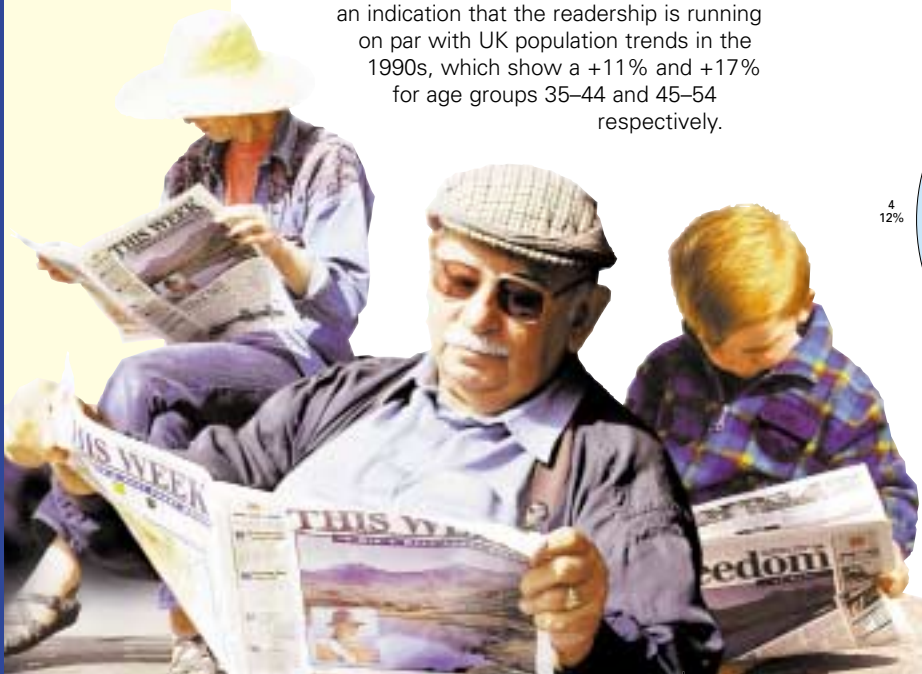
**First visits to Wales (1)**

Responses to question 1 are deceptive. They will relate to the member of the party that filled in the questionnaire but there is no way of knowing whether they are the senior members of the party in terms of age. If taken on face value, there is an indication that the readership is running on par with UK population trends in the 1990s, which show a +11% and +17% for age groups 35-44 and 45-54 respectively.

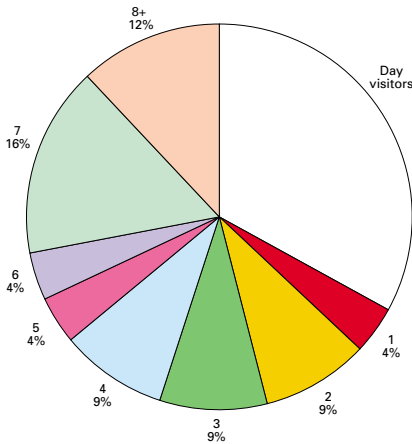
**1. First visits to Wales**



**3a. Party size**



*'Day visits at 33% were double that shown in the 1998 survey...'*



**3b. Nights stayed**

**Party size (3a)**

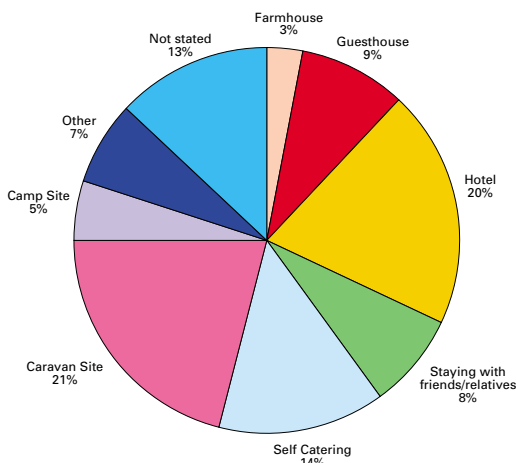
The total number of staying visitors represented by the 213 respondents to question 3a was 716, giving an average party size of 3.4. Of these 2.9 were adults and .5 children. Of the total number of parties recorded, only 35% included children.

Of the large percentage (42%) of 2 in party recorded, hardly any included children. 60% had first come to Wales 30 years ago or more (based on the information provided by the individual filling out the questionnaire).

**Nights stayed (3b)**

The 716 staying visitors represented by the 213 respondents to question 3b accounted for 3,958 nights stayed. The average stay was therefore 6.5 nights.

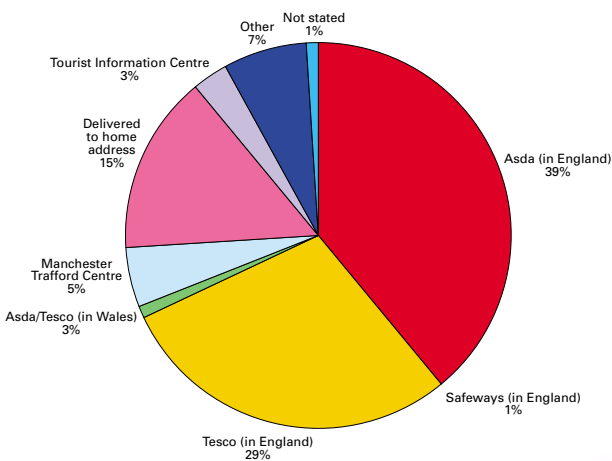
Day visits at 33% were double that shown in the 1998 survey at the expense mainly of the 1, 2 and 8+ night categories. Likely contributory factors are the overall increase in leisure trips taken and reduced journey times resulting from improved road links.



**4. Accommodation used**

**Accommodation used (4)**

Responses to question 4 will have been dictated mainly by the accommodation outlets through which the newspapers are distributed and reflect a satisfactory spread across all types.



**5. Newspaper pickup; pre-visit**



*'Early intercept of visitors is a main aim of the during-visit edition of the newspaper'*

### Newspaper pickup (5)

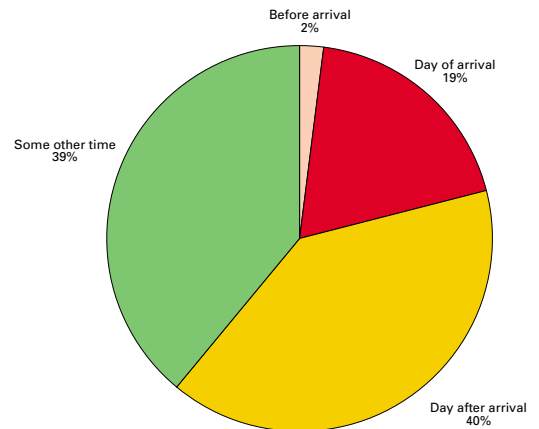
#### Pre-visit (5)

Responses to question 5 reflect the spread of distribution outlets used to attract visits to Wales in the first place, and the preferred supermarket outlets settled on by the publishers.

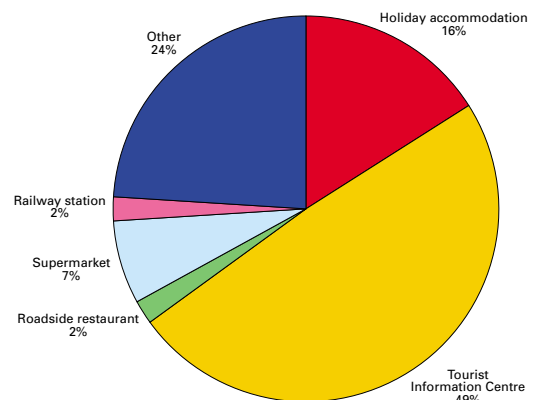
#### During-visit (5.1/5.2)

61% of the respondents who answered question 5.1 had picked up their copy of the newspaper 'before arrival', on 'day of arrival' or 'day after arrival'. Early intercept of visitors is a main aim of the **during-visit** edition of the newspaper and one of the most important findings of this and the previous survey is that this is being achieved.

Responses to question 5.2 show that pickup at visitor accommodation has held steady at 1998 levels but Tourist Information Centre pickup is reduced in favour of pickup at supermarkets in Wales. This aligns with a policy to penetrate the domestic home market for day visits and short break holidays in Wales, and the VFR market in south east Wales.



5.1 Newspaper pickup: during-visit (when)



5.2 Newspaper pickup; during-visit (where)

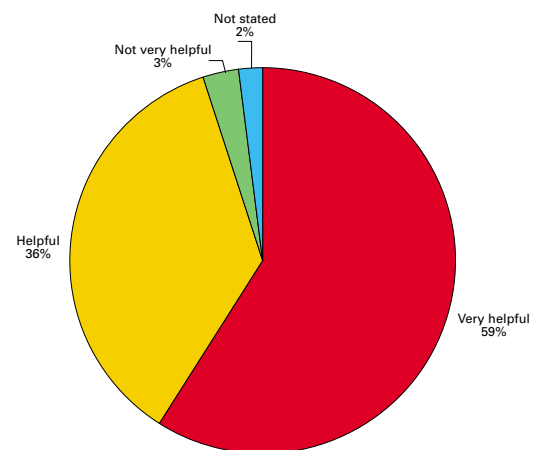
### How helpful (6)

97% of the 299 respondents who answered question 6, stated they had found the newspaper 'very helpful' or 'helpful' with 60% finding it 'very helpful', a 24% increase on the 1998 survey. This is likely to have occurred as a result of the increased use of detailed colour mapping in the newspapers, following response by the publishers to readers' comments and research on information gathering by visitors.

### Influence on return visits (7)

64% of the respondents to question 7 stated that reading the newspaper had made them more likely to return to Wales – an 8% increase on the 1998 survey; possibly also attributable to the increased use of colour mapping.

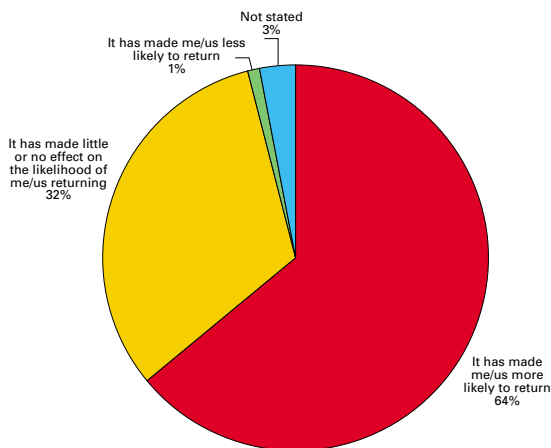
Also, when viewed alongside the results of questions 12 & 13, it is reasonable to assume that the newspaper is achieving another main aim, which is to increase the frequency of short break decision-making in favour of Wales.



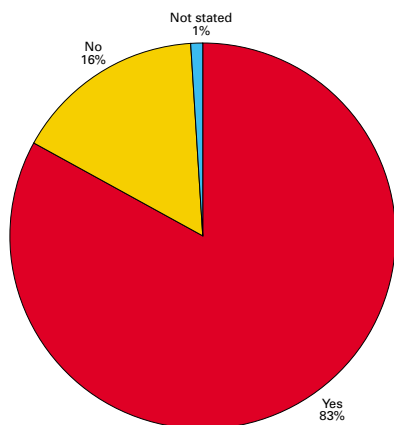
6. How helpful



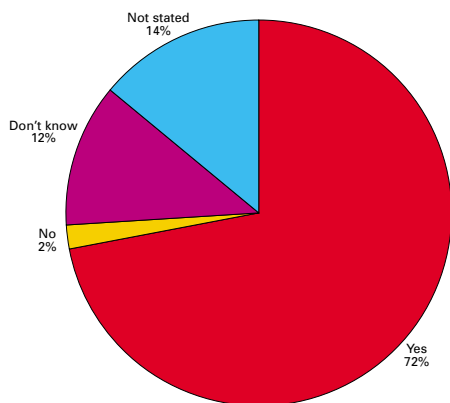
'...supermarket distribution is helping the newspaper to reach new readers...'



### 7. Influence on return visits



### 8. First time readers



### 9. Would visit have been made this time...

#### First time readers (8) ASDA TESCO

83% of respondents to question 8 said that this was the first time they had seen the newspaper compared with 70% in the 1998 survey. This indicates that the supermarket distribution, which commenced in 1999, is helping the newspaper to reach new readers, whilst maintaining its existing readership.

#### Would visit have been made this time... (9)

On being asked whether they would have visited Wales this time if they had never seen a copy of the newspaper (question 9), 72% of respondents said 'yes' as opposed to 81% in the 1998 survey, a 15% gain. The 'no' figure was up from 0% to 2%, and the 'don't knows' from 3% to 12%. This suggests that the newspaper has the ability to achieve visits to Wales that would not have otherwise occurred, which is different from its proven ability to make a return visit more likely or sooner.

#### Means of travel (10)

Responses to question 10 show a remarkable 44% increase in the use of public transport over the 1998 survey (from 9% to 15%), and a 3.5% drop in car usage (from 84% to 81%). Taken on face value, together with responses to question 8 discussed under the next heading, there is a strong indication that the 'Sustainable Tourism; Tourism & Transport' campaign – a campaign largely conducted in the pages of the newspaper through rail/bus maps and travel features – is beginning to bear fruit.

#### Influence on use of public transport (11)

Of the 245 respondents answering question 11:

- 52% stated that after reading the newspaper they were more likely to make a scenic rail trip;
- 14% were more likely to take a ride on a bus, and
- 29% were more likely to visit an attraction by bus or train.

Based on an average party size of 3.4 people, and applying the 50% safety factor, a substantial group of .7m visitors is influenced to take part in these activities each year.

To reinforce this aspect of sustainable tourism development, questionnaire incentives in future issues might include the *Freedom of Wales Flexi-Pass/Pas Fflecsi Crwydro Cymru* and *Explorer Pass* for Cadw Historic Monuments, both of which promote public transport access to visitor attractions.

'...89% (of respondents) were likely to visit Wales in the next twelve months...'

**Likelihood of return visit within 12 months (12)**

Of the respondents to question 12, 89% were 'likely' to visit Wales in the next twelve months, of which 70% were 'very likely' to visit. The results of this question, together with the results from questions 7, 9 & 13, underline the dynamics at work in the impulse purchase, short break holiday market and the newspaper's validity in this market.

**Short breaks/holidays taken each year (13)**

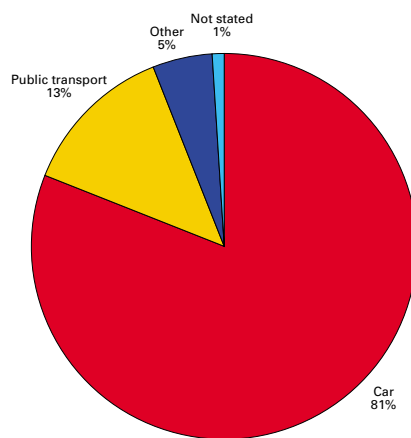
The 295 respondents to question 13 accounted for a total of 735 short breaks a year averaging 6.5 days (see question 3), and totalling 4,800 holiday days per annum. By applying the 50% safety factor to the basic annual print output, the readership of the newspaper represents a potential 4.2m holiday days spent each year.

**READERS' COMMENTS**

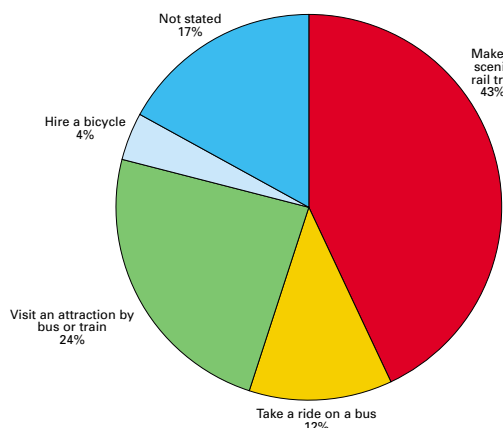
196 (62%) of the 316 respondents provided comments on the changes they would like to see made to the newspaper (Appendix 6). Chief amongst these comments in order of ranking were requests for more, or more information on:

1. Competitions
2. Admission charges
3. Accommodation/Welsh
4. Clusters of things to do/Maps
5. Walks
6. Disabled access/Transport
7. Children's things to do
8. Events/Food & Drink
9. Fishing
10. History
11. Crafts/Culture/Cycling
12. Beaches/Gardens/Internet/Wildlife

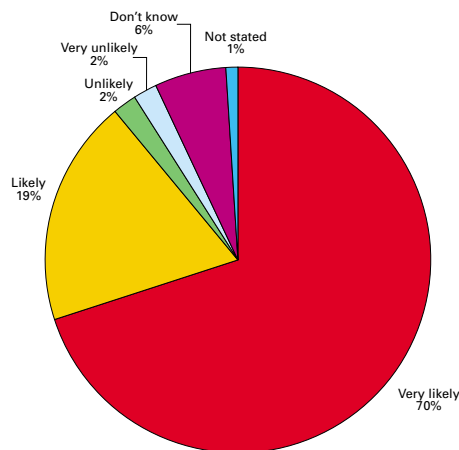
Suggestions also included more information on bus timetables, coach tours, food mail order, parking, real ale pubs, recipes, and Welsh celebrities.



**10. Means of travel**



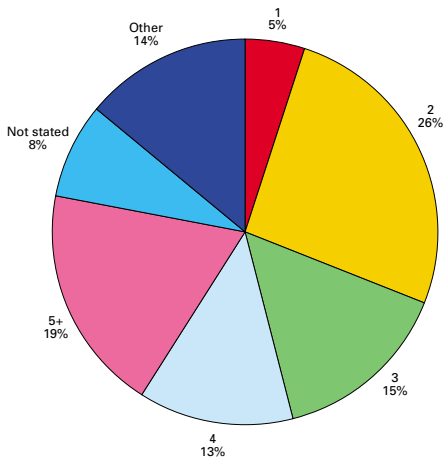
**11. Influence on use of public transport**



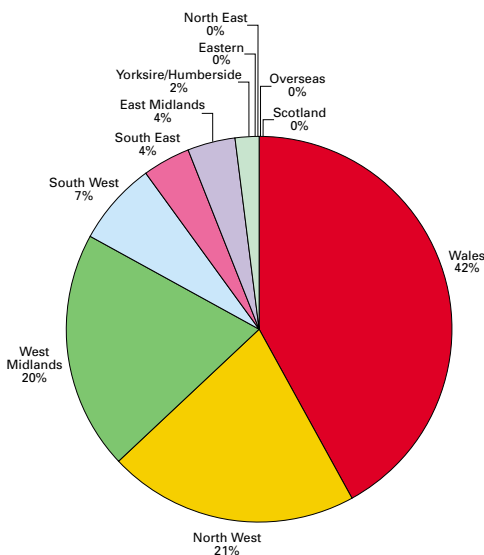
**12. Likelihood of return visit within 12 months**



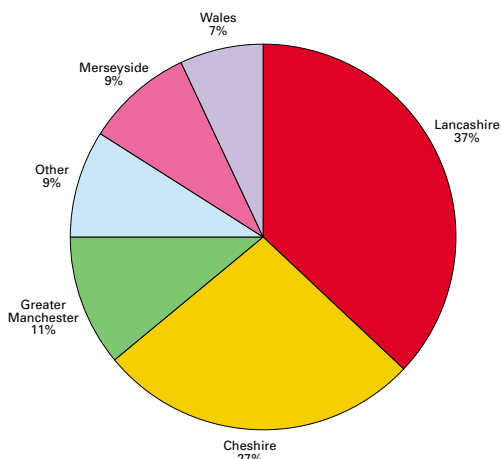
'12.6% of entrants in the 2000 competition gave email addresses...'



13. Short breaks/holidays taken each year



Taste of Wales competition entries; origin



Glan Gwna Holiday Park competition entries; origin

## COMPETITIONS

### Taste of Wales competition

A total of 2,447 entries were received from 1999 and 2000 *Taste of Wales* wordsearch competitions run in 625,000 copies of the newspaper during the survey period, giving a satisfactory 0.4% response rate and a solid database of entrants.

The prize offered in 1999 was a mid week mini break for two at the 5-star Fairyhill Hotel & Restaurant on the Gower Peninsula, and, in 2000, a similar break for two at the 3-star Penbontbren Farm Hotel on the Ceredigion-Cardigan Bay coast.

A significant factor that arose from the entries, which has implications for future marketing and promotion, is that that 12.6% of entrants in the 2000 competition gave email addresses, compared with just 7.3% in 1999; a remarkable 73% increase.

### Glan Gwna Holiday Park competition

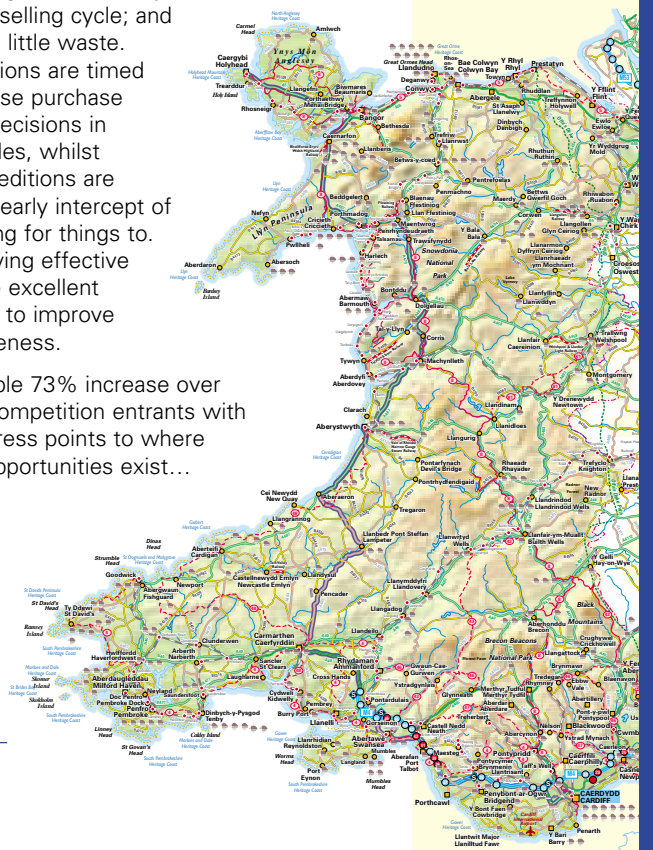
A total of 127 entries were received from 25,000 copies of the newspaper carrying a promotion for caravan holiday homes sponsored by Glan Gwna Holiday Park, giving a satisfactory 0.5% response rate and a solid database of entrants.

## CONCLUSION

Following the results of this second reader survey, there can be little doubt over the ability of the *This Week* newspaper to serve up the right information to visitors in the right place at the right time, at key points in the selling cycle; and to do so with little waste.

**Pre-visit** editions are timed to spur impulse purchase short break decisions in favour of Wales, whilst **during-visit** editions are designed for early intercept of visitors looking for things to do. Both are proving effective and there are excellent opportunities to improve their effectiveness.

The remarkable 73% increase over one year in competition entrants with an email address points to where these new opportunities exist...



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*1999/2000 Reader Survey*



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