

Visitor Information Needs EXECUTIVE SUMMARY



Llywodraeth Cymru
Welsh Government

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1. Background and Methodology

Research context

- 1.1 This research has been conducted in conjunction with the *Wales Visitor Survey 2013*, which is reported on separately.

Qualitative methodology

- 1.2 The methodology is split into qualitative and quantitative elements.
- 1.3 The qualitative element was conducted through five focus groups – three face-to-face and two online:

Location of group	Type of group	No. of participants	Type of participants
Cardiff	Face to face	8	Welsh residents
Stoke on Trent*	Face to face mini-group	3	West Midlands residents
Stoke on Trent*	Face to face	9	West Midlands residents
Online	Online	8	Spread across UK
Online	Online	5	Spread across UK

**It wasn't the intention to conduct two groups in the same place; rather the original plan was to conduct one face to face group in Wales and one in England. When we faced challenges in recruitment we decided to offer West Midlands residents the choice between afternoon and evening.*

- 1.4 All participants were recruited through the Wales Visitor Survey, and so they have all visited Wales in 2013. All groups included a mixture of different ages, online and offline users, first time and repeat visitors to Wales.
- 1.5 The online group participants were not necessarily more 'techie' than the average person; many also use offline information avidly.

Quantitative methodology

- 1.6 Questions on information usage/needs were asked in the main face to face Wales Visitor Survey to 3,323 visitors across 55 sampling sites in Wales, and in the telephone follow-up survey, conducted with 750 visitors. The sample in the main face to face survey is representative of the visitor universe to Wales, and the follow-up survey reflects this also.

2. Headline Findings

Most visitors use both online and offline sources – they play different roles

- 2.1 Most consumers planning UK breaks and holidays use both online and offline information sources. The reason why they use both is because they play different roles.
- 2.2 Online sources are generally more important pre-trip because they are used for following up pre-conceived ideas of where to go. They are important for ‘nailing’ the most fundamental aspects of trip planning such as deciding on exactly which part of a region to visit, finding and booking accommodation. Well over half (57%) of interviewed UK staying visitors to Wales used online sources pre-trip to plan their trip to Wales, compared to a much lower proportion (18%) using offline sources.
- 2.3 Offline sources are generally more important during trip. Leaflets & brochures and word of mouth recommendations from local people are particularly important in influencing visitors where they go out and what they do. About two in five (38%) interviewed UK staying visitors to Wales say they used offline sources during their trip in Wales, compared to a lower proportion (17%) using online sources.

Suggestions of discontinuing printed material are rejected

- 2.4 Such is the importance of printed material, that some participants don’t even believe their discontinuation could be considered, in spite of the understood cost. Many believe that without leaflets and brochures for attractions in the destination, they just wouldn’t know those attractions exist.

Visitors have normally already decided on the region to visit at the point when they search for information

- 2.5 Neither printed nor online ‘tourist’ information is particularly influential on visitors’ decision to visit a region. They have mostly already decided they are coming.
- 2.6 The most fundamental influences on attracting new visitors to a region are recommendations and experiences of friends / relatives / colleagues, and knowledge/perceptions of a region that are built up over a long period of time from TV adverts and other features on TV programmes, books, films and articles.

Day trips are done considerably more on the spur of the moment

- 2.7 Day-trip planning is much more minimal than break/holiday planning, if it is even done at all. Some are even happy to roam in a particular direction without necessarily a fixed plan of what to do. Most (69%) interviewed day visitors to Wales say they did not use any information to plan their trip to Wales.

Welsh residents are very open to being informed what's in Wales

- 2.8 The leaflet exercise made most Welsh participants realise there are many attractions in Wales they don't know exist. They are very open to receiving marketing information on Wales' attractions.

What makes a good leaflet?

- 2.9 The most essential features of a leaflet are an eye-catching image on the front page, a map of where it is and how to get there, when it is open, and (if possible) prices.
- 2.10 Written content should be just enough to whet the appetite, but no more. Welsh and English should be separated on opposite sides (front / back), not mixed together. Leaflets which cover several attractions are preferred to those dedicated to one.

Children raise the stakes of getting the planning right

- 2.11 Visitors taking children are under a certain amount of pressure to plan breaks and day trips well because the consequences of getting it wrong can be dire. This means being more meticulous in checking details before departure, and in checking that attractions will provide ample entertainment for children.

Special needs dictate very careful planning

- 2.12 Visitors with special party needs such as disabled access and facilities need to plan more carefully than other visitors, and being able to find the information they are looking for on special needs makes the difference between going and not going to a destination / place of accommodation.

Accommodation providers are also important information providers

- 2.13 Local people, especially accommodation providers, play a very important role in influencing visitors where to go. Their advice is sought and trusted more than online reviews because they live there, and so many visitors use local knowledge to verify their list of planned activities, or seek new ideas.
- 2.14 Smaller accommodation providers in particular are pro-active in giving local knowledge. Chain hotel staff not expected to be as helpful because they are less likely to be local, and therefore their knowledge is not trusted as much.