

# Visit Wales Off-Peak Visitor Survey 2013/14

## Staying Visitors



Llywodraeth Cymru  
Welsh Government

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May 2014



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Staying Visitors**

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**Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government**

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**Report Number: 56/2014**

**ISBN: 978-1-4734-1498-3**

**Welsh Government Social Research, 2014**

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# 1. Background and Methodology

## What is the Wales Off-Peak 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.
- 1.3 Until 2013 however, the survey had only been conducted during the peak season, i.e. Easter to September/October. The purpose of this off-peak survey is to understand if and how the profile and behaviour of visitors to Wales during the off-peak, i.e. October to March, differs from the peak season.

## How was the Off-Peak Survey conducted?

- 1.4 Face to face interviews took place at 26 sampling locations around Wales. All 26 locations were also used as sampling points in the peak season survey.
- 1.5 The breakdown in number of face to face interviews by region of Wales (i.e. where the interview took place) is shown below:

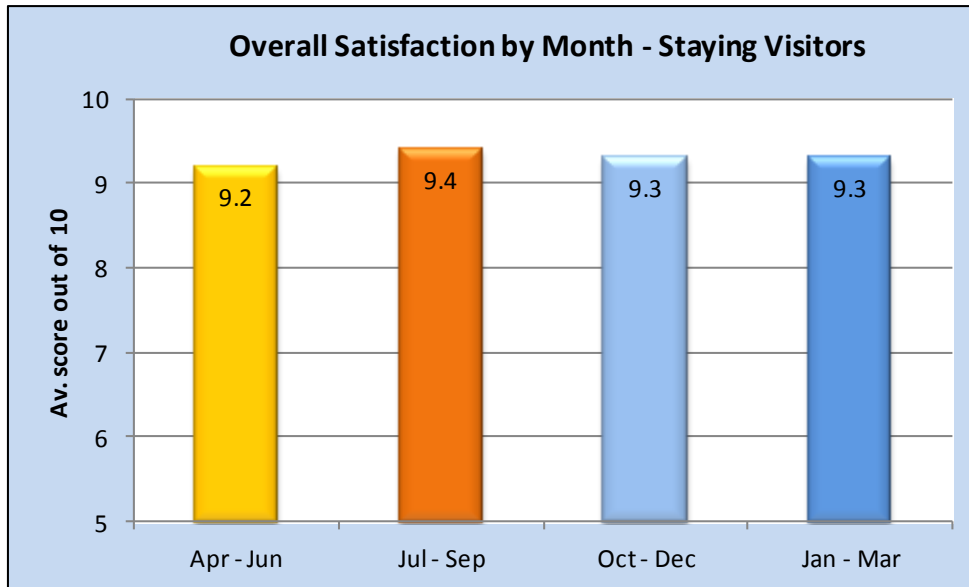
Region of Wales	No. of face to face interviews
North	312
Mid	98
South West	177
South East	415
<b>Total</b>	<b>1,002</b>

- 1.6 Interviews were conducted from October 2013 to March 2014 on a mixture of weekdays and weekends, inside and outside of school holidays.
- 1.7 This Summary looks at the results for Staying visitors (467 interviews); Overseas visitors are included in this summary as their sample (54) is too small to report on separately. Some full year results, where applicable, are also included in this summary. Day visitors are covered in a separate summary.



## 2. Headline Findings

### Satisfaction is consistent throughout the year



- 2.1 Overall trip satisfaction ratings do not differ significantly by season. The average rating given by off-peak visitors (9.3) is the same as the average rating given during peak season (9.3).
- 2.2 Trip satisfaction ratings also do not vary with the weather. This could be a reflection of the realistic expectations of current visitors to Wales.

### Why do people come to Wales in the off-peak season?

- 2.3 Many staying visitors have commented that they prefer coming to Wales outside of peak season because accommodation is cheaper and/or they enjoy the peace. Others visit in all seasons.

### Satisfaction with places to eat/drink and accommodation remains consistent

- 2.4 Overall satisfaction with places to eat/drink remains consistent through the seasons, and averages 8.8. Satisfaction with accommodation also remains consistent through the year, averaging 9.0.

- 2.5 Enjoyment at attractions dips slightly off-peak (9.0 – down from 9.2 peak season); however December sees the highest rating (9.4) of any individual month. Looking at the sampling in detail, this is likely to be linked to festive events on at the time.

### **Motivation for visiting off-peak more specific to particular people, events or activities**

- 2.6 Off-peak staying visitors to/in Wales seem to have a more concrete plan of what they are planning to do compared to peak season visitors. One in four (24%) off-peak staying visitors have visited friends or relatives (compared to 19% in peak season). Shopping is also a more common activity off-peak (24% of visitors) than peak (14%), as is attending an event / concert / performance / sporting match (11% off-peak compared to 6% peak).
- 2.7 By contrast, the more general motivation of ‘to enjoy the landscape / countryside / beach’ is slightly higher during peak season (69%) than off-peak (63%).

### **Braving the cold for outdoor activities**

- 2.8 In spite of warmer weather during peak season, staying visitors are more likely to take part in outdoor activities off-peak (45% of visitors compared to 35% in peak season).

### **Castles replace beaches as the top activity**

- 2.9 About two in five (42%) off-peak staying visitors have visited a castle or other historic attraction – just ahead of the beach (38%), which is still a draw off-peak.

### **Wales attracts new and lapsed visitors all year round**

- 2.10 About one in six (17%) staying off-peak visitors are new, and about one in five (21%) are lapsed. These figures are similar to the peak season profile, indicating that Wales is capable of attracting new/lapsed visitors all year round.

### **‘Younger Less Well Off’ segment indexes much higher than in peak season**

- 2.11 13% of UK staying visitors are in the ‘Younger Less Well Off’ segment. This is considerably higher than in peak season (4%).
- 2.12 The off-peak visitor profile is somewhat younger and includes more groups of friends than in peak season. About one in eight (13%) staying parties in the off-peak are groups of friends - noticeably higher than in peak season (7%).

## Off-peak season is more for short breaks

- 2.13 About three in four (76%) off-peak trips are short breaks; about one in five (19%) are holidays, normally a secondary holiday. This compares to 43% of peak season visits being holidays.

## Higher intentions to return

- 2.14 The vast majority (83%) of visitors from outside Wales say they will 'definitely' return to Wales within the next few years. This is significantly higher than peak season visitors (73%), who are much more likely to have come for a holiday than a break compared to off-peak visitors.