

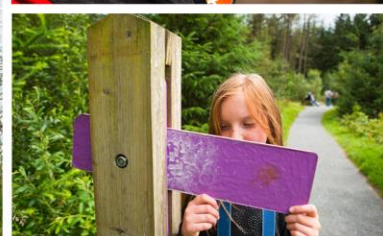
Visitor Information Needs REPORT



Llywodraeth Cymru
Welsh Government

www.cymru.gov.uk

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1. Headline Findings

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

- 1.1 Most visitors use both online and offline information sources for their UK breaks and holidays. The reason why they use both is because they play different roles.
- 1.2 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.
- 1.3 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.

Suggestions of discontinuing printed material are met with denial

- 1.4 Such is the importance of printed material, that some participants don't even believe that 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

- 1.5 Neither printed nor online 'tourist' information is particularly influential on visitors' decision to visit a region. They have mostly already decided they are coming.
- 1.6 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 hoof'

- 1.7 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.
- 1.8 The weather forecast is the most important type of information for planning a day trip.

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

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

What makes a good leaflet?

- 1.10 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.
- 1.11 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

- 1.12 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

- 1.13 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 – undercover TIC

- 1.14 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.
- 1.15 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.

2. Background and Methodology

Survey context

- 2.1 This research has been conducted in conjunction with the *Wales Visitor Survey 2013*. The subject of *Visitor Information Needs* was considered to be such an important subject to Visit Wales and stakeholders that it has warranted separate attention and reporting, hence this stand-alone report.

Qualitative methodology

- 2.2 The methodology is split into qualitative and quantitative elements.
- 2.3 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.*

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

Quantitative methodology

- 2.7 Questions on information usage/needs were asked in the main face to face Wales Visitor Survey to 3,323 visitors across 56 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.
- 2.8 More details on the quantitative methodology can be viewed in the *Wales Visitor Survey 2013* reports.

3. Breaks and Holidays – Pre-Trip

Overview of planning stages and reporting structure

- 3.1 From the qualitative research there are broadly five stages of using information to plan a UK break or holiday:
- Inspiration – getting ideas of which part of the country to visit
 - Follow-up – investigating ideas from the inspiration stage in more detail
 - Nailing down – confirming the most important aspects, especially booking accommodation
 - During-trip
 - Post-trip
- 3.2 We discuss the first three stages in this Section (Pre-trip) and look at the last two stages in Section 4.
- 3.3 Day trip planning is different, and we look at this in Section 5.
- 3.4 We discuss the quantitative research in Section 7.
- 3.5 In Section 8 we combine the qualitative and quantitative findings to summarise visually the level of importance and level of usage of each information source at the five different stages of planning UK breaks and holidays.

Stage 1: Inspiration

- 3.6 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.

‘So tell me about your holiday!’

- 3.7 Recommendations and experiences of other people can come in different forms, from conversation to the sharing of photos and gossip on Facebook. The days of receiving postcards from relatives are gradually being replaced by social media, and phones are becoming a much more common means of sharing photos compared to printing them out and passing them round.

- 3.8 This personal source of inspiration is highly important because people trust who they know, and understand their individual circumstances, e.g. a friend with small children sharing an experience is invaluable to another person with small children as their circumstances are the same.

“Friends, relative and colleagues, a mixture of the three ... especially if they’re quite close you and you and have the same interests cause you think ‘oh right, I might go there’”

Female, Cardiff

“Hearing it from the horse’s mouth, they’ve been there and know that this is good and that’s good”

Female, Cardiff

“I sent two of my friends to Rhosilli after I had visited the place ... they were so excited from the way that I had described the whole experience of Wales”

Male, Online

Long-term engrained perceptions

- 3.9 The second fundamental source of inspiration comes from the long-term perception of destinations that is built up from TV advertising and other features on TV programmes, books, films and articles.
- 3.10 Some people have a mental ‘shortlist’ of UK destinations that they intend to visit some day, and what they see and read about in the media influences which destinations make it onto this shortlist, and the priority order.

Previous experience can over-ride everything

- 3.11 Previous experience of course can over-ride everything, because many people return year after year to the same destination on holiday. The *Inspiration* stage is mostly relevant to new and lapsed visitors.

“Word of mouth and TripAdvisor are very useful but it’s all down to personal experience. You don’t know a place until you go there”

Female, Online

‘Tourist information’ not very influential at this stage

- 3.12 Neither printed nor online ‘tourist’ information (e.g. brochures, websites) is particularly influential at the *Inspiration* stage. It comes into its own at the second stage: *Follow-up*.

Stage 2: Follow-up

- 3.13 After being inspired by another person's experience or the media, the second planning stage concerns following up the idea in more detail to confirm its feasibility, and whether the idea really is as good as it seemed at the *Inspiration* stage.

'It looks a great place, but now I need to know more'

- 3.14 Going through people's heads at this stage are thoughts like, "*But will there be anything to do for the kids?*", and "*How long will it take to get there?*".
- 3.15 For parties with special needs, e.g. disabilities, and to some extent those with young children, this second stage will really make or break the idea, because they won't investigate it further if they're not certain their needs will be met.

"My son's needs are most important and keeping him entertained"
Male, Online

- 3.16 The most important information source for special needs groups at this stage is the accommodation provider. There is no substitute for communicating directly with them by phone or email to confirm in black or white whether the needs will be met.

Brochures and websites

- 3.17 'Tourist information' such as websites and brochures really comes into its own in this *Follow-up* stage. Whilst it usually doesn't inspire the idea, it is fundamental for following up the idea.
- 3.18 There is no rhyme or reason as to whether people use online or offline sources at this stage, and some use both. There is some link to generation (i.e. the older respondents are more likely to rely on offline sources), but this link is tenuous; some of the older generation are quite internet savvy nowadays as it might be the only means of keeping in touch with their granddaughter who has gone travelling in Australia.
- 3.19 Similarly, just because a person is young doesn't mean that they don't see the benefits of using a brochure over a website.
- 3.20 The reasons why some people use both online and offline sources at this stage are summarised below:

Advantages of online (usually websites at this stage)	Advantages of offline (brochures, leaflets, guidebooks)
It's convenient, instant and free	It's more comfortable – can read it whilst relaxing on the sofa, in the bath etc
Limitless amount of information available	It can be shared with the rest of the party more easily
Perceived as more up to date than printed material	Less likely to remind people of work compared to sitting at a computer
Can read reviews of other visitors	Pictures are more powerful than online
	Some get excited by the feel of it
	Don't get as lost in printed material
	Can take it with you on the trip
	Children pick it up, and children have a major influence on where their parents take them
	Non-internet users can use it

“Can read a brochure twice as fast as online ... it's so time-consuming with the different links ... depending on your computerisation you might get thrown out a couple of times”

Male, Stoke

“You can't just say which [online / offline] is the best ... I want to see something physically .. and then I like to go onto the internet to find extra stuff”

Male, Stoke

“One [online / offline] is like a back-up of the other”

Female, Stoke

“We usually start with offline and then check in greater detail online”

Female, Online

“When you go online it can be like research, but flicking through leaflets can be enjoyable”

Male Online

Google is normally the first point of call for internet users

- 3.21 Internet users normally commence their search for information by using Google. The typing in of specific website addresses into the browser is not very common unless it is very well used and remembered (e.g. TripAdvisor).
- 3.22 Tourist board website addresses are rarely typed in directly. However, tourist board websites are considered trustworthy. People seem happy to end up on them (through Google).
- 3.23 Brochures and leaflets sometimes prompt the direct typing in of a website address into a browser.

Stage 3 – Nailing down

- 3.24 After confirming whether a destination is suitable in stage 2, possibly having compared it against alternatives, the final pre-departure stage concerns nailing down the most fundamental aspects of the break/holiday. Most important here is confirming:
 - The exact location (e.g. they might have decided they're going to Pembrokeshire but not exactly where yet)
 - The exact timing of the trip
 - Finding and booking accommodation

Websites come into their own at this stage

- 3.25 Websites really come into their own in this third stage. The vast majority of those who can use the internet do so, as its advantages far outweigh what a brochure is able to provide:
 - Internet offers a wide net of accommodation options with up to date availability
 - Internet offers the ability to drill down into the detail of exact locations and what they offer

Online reviews – are they trustworthy?

- 3.26 Some visitors search for online reviews at this stage on sites such as TripAdvisor. Visit Wales commissioned a separate piece of research into the ‘Impact of UGC sites and grading on consumer decision making’ in 2012, and so we have not explored the topic in depth again here. However, the findings summarised briefly here are consistent with the 2012 research.
- 3.27 Online reviews can be highly useful as they are in some respects more trustworthy than marketing literature, which is hardly likely to say anything negative about the destination / attraction / accommodation it is promoting.
- 3.28 Some people however are wary of online reviews because they don’t know the person who is giving the review and their circumstances, or if the review is even genuine.

“We booked to go to a place in Scotland ... and then I looked at the reviews and, oh, they were vile ... people were going on about burst pipes and soggy floors and mould and I was proper [sic] dreading it ... but we got there and it was lovely!”

Female

Attraction websites – amalgamated or specific to one attraction?

- 3.29 Visitors say they need both of the above. They need an amalgamated site to see a range of attractions available in an area, and then they want a specific site about the preferred attraction.

“The one with many different attractions may give ideas of places you perhaps hadn’t considered and then I would look at their specific site for further and more detailed information”

Female, Online

Non-internet users will pick up the phone at this stage

- 3.30 Those who have only used brochures up till this stage will pick up the phone to (a) find if and when their preferred accommodation is available, and (b) book it.
- 3.31 There are also reasons why some internet users will prefer to book their accommodation over the phone, having found it on the internet. These reasons normally include having a specific need that is best discussed over the phone with the provider.

4. Breaks and Holidays – During and Post Trip

Stage 4 – During Trip

- 4.1 Whilst a lot of trip planning is done prior to departure, some is done whilst in the destination. The extent to which planning is split pre- and during trip depends on:
- The organiser(s) and their personality type
 - Familiarity with the region
 - Importance of getting it right – e.g. special needs, type of occasion, length and cost of stay
- 4.2 Important information sought during trip can be:
- Ways to spend a day
 - How to get to places
 - Where to eat out
- 4.3 Offline information sources come into their own at this stage, and are found in two main forms: local people and leaflets.

Local knowledge is king

- 4.4 Participants in all the focus groups have stressed how important talking to local people is in informing them where to go, what to do and how to do it. Whilst some will arrive in a destination with researched ideas of how to spend their time, these ideas are then verified with local people, almost like they're consultants.

“Local shops, that’s local knowledge, isn’t it ... not like on the internet”
Female, Stoke

“You get to know the people in the next tent .. and say “where’s a good fish and chip shop?”
Male, Stoke

“Maybe you’ve looked it up ... but then you might say ‘is this worth going to in your opinion? How easy it is to get there? Usually they will tell you the best form of transport to take, the best route”
Female, Cardiff

4.5 Local people are perceived as more trustworthy than online reviews because they have a range of experiences, not just one bad one.

4.6 Sometimes when travelling through smaller places there are no TICs, and some places of interest such as smaller pubs, churches etc don't advertise online, so local people are essential for knowledge.

"It's not till we actually get there that we realise there's more than what we thought there was from looking online"

Female, Cardiff

4.7 Some people arrive in a destination with limited ideas of what to do because they expect to gather ideas on arrival. Local people are extremely influential to what these visitors do and where they go.

4.8 Accommodation providers are particularly influential if the establishment is small. They are more likely to be local – and therefore trusted more by the visitors – and it matters more to them that their guests have a good experience because they own their own business.

4.9 Reception staff in chain hotels by comparison are trusted less because they might not be local, and they are less likely to have an interest in helping out local business (so their knowledge is not perceived to be as good). Visitors tend to go straight to the leaflet dispenser instead.

4.10 'Local people' in order of overall level of influence they have on what visitors do in their destination are:

- Accommodation providers – small establishments
- TIC staff
- People working locally in retail and consumer services, e.g. people working in shops, cafes, taxi drivers
- Reception staff in chain hotels

4.11 In the context of information provision to visitors, small accommodation providers and TIC staff effectively do the same job, and are trusted about equally. The reason why accommodation providers are at the top of the above order of influence is that nearly all visitors will receive advice from their accommodation provider, whereas not everyone will visit a TIC. Accommodation providers have the added advantage that they are always available, whereas a TIC isn't always open, and there might not even be one in the area.

Leaflets and magpie behaviour

- 4.12 Leaflets are a very important information source to visitors during their trip – both to those who use online sources and those who don't.
- 4.13 Some visitors behave like magpies and grab any leaflet that looks eye-catching. Most are reasonably selective in what they pick up from a dispenser, i.e. they will pick up anything which looks of interest to them but without just 'grabbing a load'.

"I'm like a magpie, I go for the brightly coloured ones"
Female, Stoke

- 4.14 Accommodation providers are very influential in making leaflets available to their guests. Small establishments also allow visitors to leave information for future visitors coming in.

Don't stop the leaflets!

- 4.15 We have asked leaflet-users what they would do if printed material were discontinued on the grounds of cost.
- 4.16 Such is the importance of printed material, that some participants don't even believe that 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.

"My first port of call in the hotel is the rack with all the leaflets on"
Male, Stoke

"You can't use Google to search for something if you don't know it's there"
Female, Stoke

- 4.17 Some believe that the elderly market is very important to some destinations (including Wales), and stopping printed material would alienate them.

"I don't have a [mobile] phone. I had one once but I got cut off because I never used it"
Male, Stoke

"It was ages before I realised what an app was ... I thought it was short for appointment"
Female, Stoke

- 4.18 Special needs parties need leaflets for re-assurance:

"I used to work with autistic adults ... and I cannot agree enough how important the re-assurance is in a situation like that. A leaflet makes it so much easier"

Male, Online

- 4.19 Those who are able to use the internet would replace leaflets with increased internet usage, but many of them say that the loss of leaflets would hamper enjoyment, and the ability to share ideas with others would be hindered. Maps are also a very valuable feature of leaflets.

"Leaflets are good for spreading out in front of you ... online you can only see one page at a time"

Male, Stoke

"Mobile internet – it's a small screen, the detail is hard to read. Reception is sometimes bad ... leaflets are very good in isolated places. You would miss all those places"

Male, Stoke

"It's like the Kindle – it's not a book to me. I need to physically feel it."

Female, Stoke

"It would be a bit of a shame because it's nice to take a leaflet home with you to remind you of where you went"

Female, Online

Mobile internet usage – important details for some visitors

- 4.20 Internet usage during trip to find information is not as widespread as using leaflets. Nevertheless it does provide very important fine details for those who use it at this stage. 'Important details' sought from this source at this stage include:

- How to get to places – maps and public transport routes & timetables
- Opening times and prices of attractions
- Weather forecasts

- 4.21 Both websites and apps are used among those who search online at this stage, but websites are preferred. Some associate apps with 'play things'.

"Apps tend to be play things for me. Games, song identification, fun things on the screen. Websites I treat more as information boards"

Male, Online

- 4.22 Many internet-users do not use the internet during their trip. The main reasons are:

- Some like to have planned everything they need the internet for before they depart
- Some don't have a smartphone
- It's not as enjoyable as looking at leaflets, and so it doesn't fit comfortably with the 'holiday experience'

"If you're on holiday, you're on holiday. You don't want to be searching websites whilst you're enjoying yourself having a pint"
Male, Cardiff

"I quite enjoy switching my phone off when I'm away"
Female, Online

Internet usage during trip can be important for sharing experiences however

4.23 There is an important second role of mobile internet usage during trip, and that is to upload photos and share experiences with friends and relatives back home. As discussed, this is very influential for inspiring others to visit the destination.

QR codes are a non-starter

4.24 Some people know what a QR code is and some people don't. The vast majority of those who do know what they are don't use them. They are seen as overly cumbersome (the phone won't always read them) and an unnecessary means of finding out information which can be obtained a lot more easily in other ways such as through websites and apps.

"It's what sorry? Q – R code?"
Female, Stoke

"Is it that funny square bar code?"
Female, Online

4.25 Just one participant in the focus groups uses QR codes, although she admits that the main attraction of using them is the 'gimmicky' aspect more than to acquire information.

Stage 5 – Post-trip

4.26 The role of information extends beyond the trip. This falls into two main areas:

- Keeping leaflets as mementos, to recommend to others or to inform future trips
- Sharing of photos using social media

‘We had such a nice time there’

4.27 Some leaflet-users like to keep leaflets after their trip. This could be as mementos (whereby they will keep the ones where the experience was good), to inform future trips (by keeping the ones of places they didn’t visit) or to make recommendations to others.

4.28 For whatever they are kept, leaflets can play an important role in bringing visitors back to a region and for attracting new visitors to come.

‘Jenny was with Sarah and Chloe in Blackpool 10 Likes 5 Comments’

4.29 There was a time when visitors would return from a break/holiday and print out their photos to share with others. Social media are gradually replacing that practice, and now experiences are often shared either by passing the phone around or by uploading photos to Facebook to invite a flurry of ‘likes’ and comments.

5. Day Trips

Planning day trips is different to breaks & holidays

- 5.1 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.

"We'll go for a drive, we'll head in that direction"
Female, Cardiff

- 5.2 There is no accommodation involved, and so visitors are not 'tied down' planning a trip to a specific place on a specific date. This much greater flexibility gives people the feeling that planning is less important because it's easy to switch plans last-minute. There is generally much more of a 'just turn up and see' attitude.

"I generally just go. I don't really look for much if I'm just going for a day"
Female, Online

'What's the weather like this Saturday?'

- 5.3 The weather forecast is the most important type of information needed to plan a day trip. Many will then base their plan around that.

Journey times are much shorter

- 5.4 People are only prepared to travel a certain distance for a day trip. The *2013 Visitor Survey* shows that most day trips in Wales are taken by Welsh residents, and those residents normally stay within their own region.

Welsh residents don't realise the extent of what there is to see in Wales

- 5.5 The Cardiff focus group and one of the online groups have revealed that Welsh residents may think they know Wales, but the leaflet exercise has made them realise they don't even know a lot of what is nearby to them. They are very open to being marketed to more.

"I would like more information [on Wales]. Sometimes it is difficult to see what's in front of you"
Male, Online

‘I’m bored, Mum’

- 5.6 Day trips with children are planned more carefully than day trips without children because the consequences of getting it wrong are more severe.

6. Specific Needs in Wales

The focus group sessions focussed mostly on information needs for planning UK trips, but we have also gathered feedback specific to Wales.

Visit Wales' information provision is thought to be excellent by those who have used it

- 6.1 Some participants use Visit Wales information provision, including the website and its brochures. When raising the subject, some of these participants were quick to start recommending to other participants that they search for it too.

"The brochures from Visit Wales are excellent"
Female, Stoke

"I found the Visit Wales website very helpful ... I couldn't decide where in Wales to go and it had info for all over in one place so you could compare different places and the activities on offer"
Female, Online

- 6.2 The two sessions in Stoke then progressed onto participants wanting to get themselves onto Visit Wales' mailing lists to receive a brochure. They are interested in discovering new parts of Wales.

Disabled information provision could be better

- 6.3 Wales is seen as good for disabled needs and it is recognised that a lot of money has been invested in this area. However, information on disabled needs is not very available or prominent. Some see this as a significant marketing opportunity for Wales.

"They've spent all this money on the infrastructure (disabled) but where's the advertising for it?"
Female, Stoke

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

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

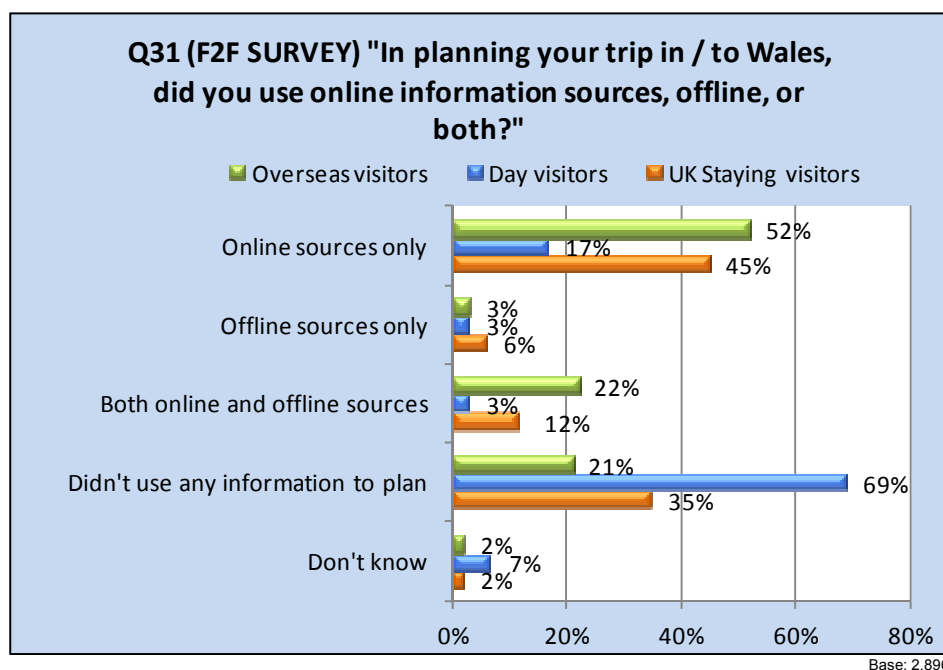
- 6.5 Wales residents have a rough idea of what's out there (in Wales), so they do less planning than other UK visitors, but they do miss attractions because of not searching thoroughly for information. They don't find it easy to find information on what's in Wales – they don't really know where to look.
- 6.6 Shopping centres, supermarkets and school receptions have been suggested as good places to place leaflets.

7. Quantitative Findings

Questions on information usage have been asked in the face-to-face Wales Visitors Survey and by telephone in the follow-up to the Visitor Survey. Here we discuss the main findings and in places use insight gained from conducting the focus groups to explain the results.

Each chart displays which survey the data have been taken from.

Overview of information sources used pre-trip



The above question has been asked in the face to face survey to all respondents

Online sources are much more popular than offline pre-trip

- 7.1 Online information sources are used by many more people than offline sources pre-trip. However, exploration in focus groups has revealed that 'offline' in the F2F survey will have been interpreted largely as printed material such as brochures or leaflets. An extended definition of 'offline' to include speaking to people (and not just printed material) would most likely have seen many more people answering 'both'.
- 7.2 From the point of view of an organisation like Visit Wales producing information though, we can conclude that online information is used by many more people than printed material pre-trip.

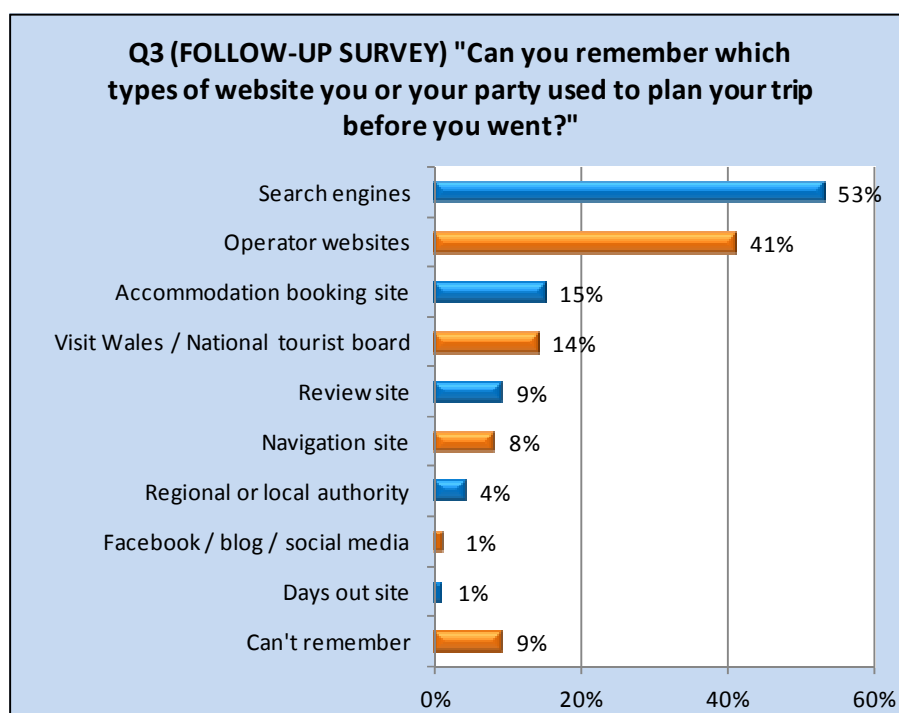
There is some link between online/offline preference and age

- 7.3 As one would expect, there is a link between online/offline usage and age. However it would be incorrect to generalise that older visitors prefer offline sources. More than a quarter (28%) of over 65's used online sources to plan their trip to Wales, compared to a smaller proportion (15%) using offline sources.

Day-trip planning is minimal

- 7.4 About seven in ten (69%) day visitors to Wales say they did not use any information to plan. This is consistent with the focus group findings.

Types of website and apps used pre-trip



The above question has been asked to those using online sources pre-trip

Base: 270

Google dominates

- 7.5 Search engines are dominant in which websites visitors end up on. In the focus groups all participants searching online use Google as their preferred search engine. Typing in specific web address into a browser is less common than using Google.

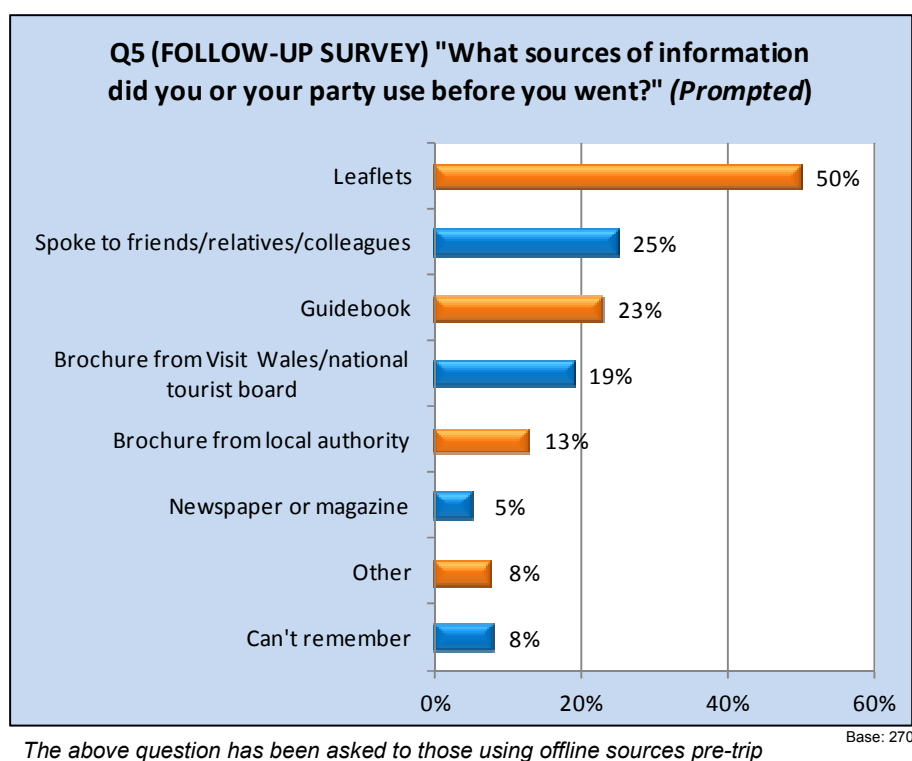
Visit Wales website

- 7.6 About one in seven (14%) visitors say they used the Visit Wales website pre-trip. Visitors are generally happy to 'end up' on a national tourist board website because they feel they can trust it. However, it is crucial to get the search optimisation right with Google as this is mostly how people will find it.

Usage of apps

- 7.7 In a separate question, about one in ten (9%) users of online information to plan their trip to Wales say they use apps. Usage of apps is more prevalent among the under 55's (12% of respondents) than among the over 55's (5% of respondents).

Offline sources used pre-trip



Leaflets are sometimes kept from previous trips

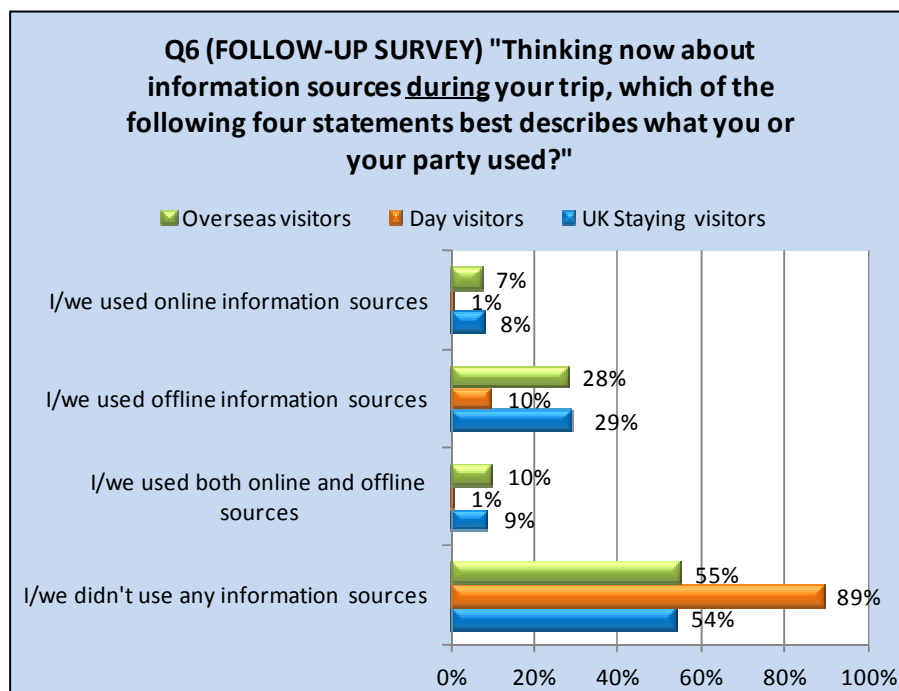
- 7.8 Half (50%) of visitors using offline sources pre-trip used leaflets to plan their trip to Wales. As discussed earlier in the focus group findings, people sometimes keep

leaflets picked up during one trip to plan the next one, and so this is an important reason to continue producing them.

Brochures hold a lot of value for those who use them

- 7.9 About a third (32%) of offline users say they used a brochure from either a national or local authority pre-trip. The volume of people using tourist brochures is not what it was before the internet started to dominate; however, as discussed in the focus group findings, brochures are very valuable to the people who still use them due to their many advantages over searching online.

Overview of information sources used during trip



The above question has been asked to all respondents in the telephone follow-up survey Base: 750

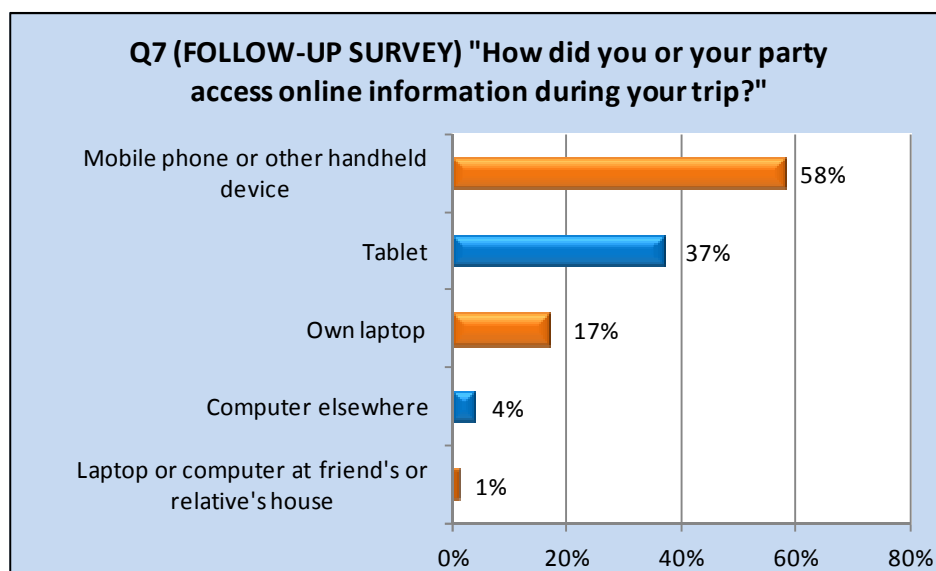
If information is used during-trip, it is mostly offline

- 7.10 The contrast between online and offline information can be seen either side of visitors' departure. If visitors use information during their trip, it is mostly offline. It is important to note also that differences between age group are not significant.

Day-trip planning is minimal again

7.11 Planning during a day-trip is very minimal, as is also the case pre-trip. Use of information at this stage for a day trip tends to be if something doesn't go as expected, such as the weather turns bad or an attraction turns out to be a disappointment.

Accessing online information during trip



The above question has been asked to those using online sources during-trip

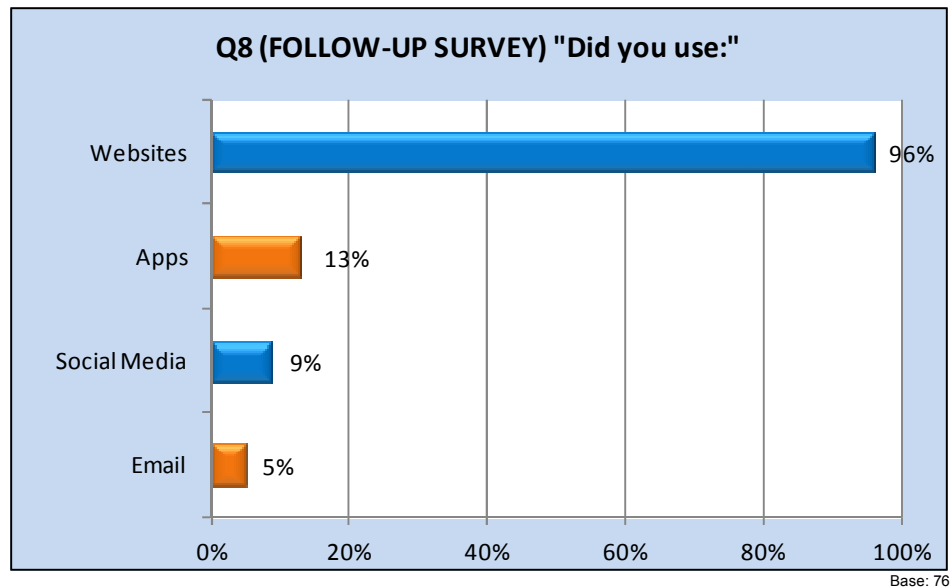
Base: 76

Frequency of device used is relative to size (or something like this!)

7.12 Options to access the internet during-trip range from small handheld devices to finding a computer to sit down at somewhere. The smaller the device, the more likely it is to be used.

7.13 The sample of those using online information during-trip is not large enough to break down reliably by respondent groups, but it appears that older (over 55) online users prefer tablets to mobile phones, whereas with younger visitors it is much the other way round.

Type of online information used during trip

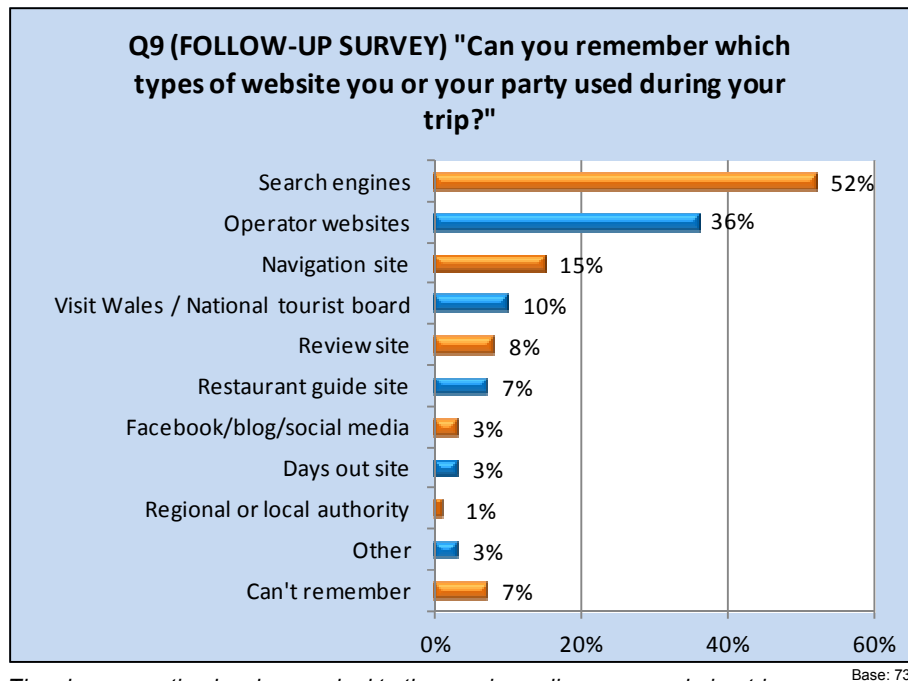


The above question has been asked to those using online sources during-trip

Websites still much preferred to apps

- 7.14 Apps are a more 'fashionable' technology than websites, which could be viewed as a bit more 'old hat', but websites win easily against apps in terms of what visitors use during-trip.
- 7.15 The focus group discussions support this finding. Apps could be viewed as more 'playful' rather than appropriate for finding out 'serious' information.

Websites used during-trip

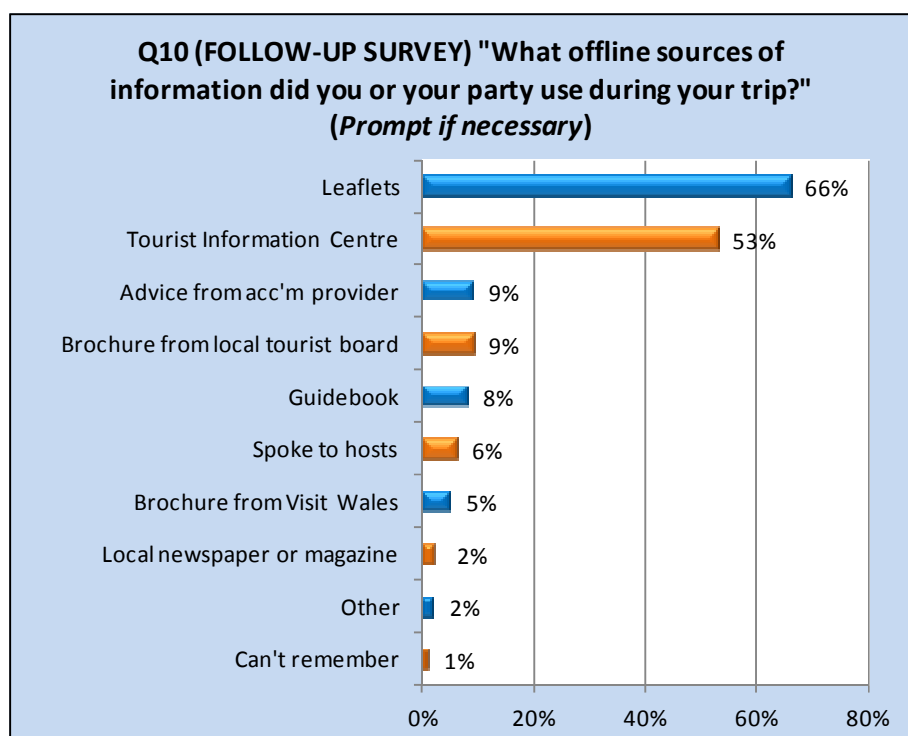


The above question has been asked to those using online sources during-trip

Little difference in types of website used pre-trip vs during-trip

7.16 Types of websites viewed during-trip are very similar to pre-trip: Google still dominates, and operator websites are more used other types.

Offline sources used during trip



The above question has been asked to those using offline sources during-trip

Leaflets are keenly sought during trip

- 7.17 Leaflets really come into their own at the during-trip stage. The second most frequent answer – TIC – is viewed by many as a means of finding leaflets (as well as also asking for advice if they need it).
- 7.18 'Advice from accommodation provider' scores only 9% on the above question but some care needs to be taken when interpreting the results. Respondents have been prompted with random items on the list if they haven't answered spontaneously, but on the telephone it is not usually practical to read out lengthy lists in full. Therefore many respondents may not have thought to give this answer, but the focus group sessions have shown that the majority of visitors do rely on accommodation staff significantly.

8. Visual Combination of Qualitative and Quantitative Findings

- 8.1 Here we combine the qualitative and quantitative findings to summarise visually the level of importance and level of usage of each information source at the five different stages of planning UK breaks and holidays.

Friends / Relatives / Colleagues

Planning Stage	Volume of Users	Level of Importance to those using them
Inspiration	High	Very High
Follow-up	Low	Low
Nailing down	Very Low	Low
During-trip	Very Low	Low
Post-trip	Medium	High

Recommendations and shared experiences from known people have a very high influence in inspiring new ideas of destinations to visit

Destination Advertising and PR

Planning Stage	Volume of Users	Level of Importance to those using them
Inspiration	High	Very High
Follow-up	Low	Low
Nailing down	Very Low	Very Low
During-trip	Very Low	Very Low
Post-trip	Very Low	Very Low

Destination advertising and PR is fundamental for inspiration. Its effect on awareness and perceptions is long-term

Online sources

Planning Stage	Volume of Users	Level of Importance to those using them
Inspiration	Medium	Medium
Follow-up	Very High	Very High
Nailing down	Very High	Very High
During-trip	Low	High
Post-trip	Medium	High

Online comes into its own in stages 2 and 3 when people follow up and nail down initial ideas

It is also important post-trip when visitors share their experiences, which in turn can inspire others to visit

Brochures

Planning Stage	Volume of Users	Level of Importance to those using them
Inspiration	Low	Medium
Follow-up	Low	Very High
Nailing down	Very Low	Very Low
During-trip	Low	High
Post-trip	Low	Medium

Brochures are not as widely used as they used to be, but they are important to those who use them, especially in the follow-up stage

Leaflets

Planning Stage	Volume of Users	Level of Importance to those using them
Inspiration	Very Low	Low
Follow-up	Low	Medium
Nailing down	Low	Low
During-trip	High	Very High
Post-trip	Low	Medium

Leaflets come into their own during trip. The majority feel they are more practical and enjoyable to use than online whilst away.

Local People

Planning Stage	Volume of Users	Level of Importance to those using them
Inspiration	Very Low	Very Low
Follow-up	Low	High
Nailing down	Low	High
During-trip	Very High	Very High
Post-trip	Very Low	Very Low

Local people, especially accommodation providers, are very influential on where visitors go during their trip and what they end up doing.

They also play an important pre-trip role for parties with special needs.

Tourist Information Centres

TICs play an interesting 'hybrid' role in that they are both local people and a place to pick up leaflets.

Their importance is a combination of local people and leaflets above.

9. Implications for Visit Wales and Partners

- 9.1 Here we conclude with implications for Visit Wales and partners based on the research findings.

Advocacy is key

- 9.2 Recommendations and shared experiences from friends, relatives and colleagues are highly influential in inspiring ideas of new places to visit.
- 9.3 Anything which Visit Wales can do to encourage advocacy among visitors will have a significant impact on attracting new and lapsed visitors to Wales, especially because visitor satisfaction with Wales is so high (*measured in the Wales Visitor Survey 2013*).
- 9.4 Photos are very influential; visitors now tend to share photos and experiences either on their phone or on social networking sites during and post-trip – this now appears to be more common than sending postcards and passing around a wallet of printed photos.

Destination advertising and PR investment needs to be maintained

- 9.5 Measuring direct return on investment from advertising and PR is notoriously challenging, but it is clear that it is significantly influencing new visitors. That's because those viewing the brochures and the website to a large extent already know they are coming to Wales, and so the advertising and PR activity is needed to give the inspiration in the first place.

Focus of brochure and website content

- 9.6 People looking for information tend to know already that they are coming to Wales, and so the focus of the information should not be about *inspiration*, rather it has an important role to play in *affirming* to people that they are making the right decision to come.
- 9.7 Will there be enough interesting things to do for my children? Where is the best part of Pembrokeshire to stay in? Will I be able to push my elderly mother around in her wheelchair? These are the type of questions that the website and the brochures need to answer.

Don't stop producing leaflets!

- 9.8 Leaflets though are a crucial information source during-trip, including to internet users. Visitors could mostly 'get by' without them, but they wouldn't know that certain attractions exist, and their experience would be spoilt. There would also be crucial missed opportunities in advocacy and in prompting repeat visits.

What makes a good leaflet?

- It must cover the basics well – opening times, clear map of where to find it, prices, disabled access.
- Eye-catching front cover, especially through use of colour and picture. The top part of the cover is particularly important because the bottom part is often covered up through the way that leaflets are stacked in dispensers.
- Enough 'snippets' of information to entice people, but don't need more than that.
- English and Welsh on opposite sides, not 'jumbled up'.
- Multi-attraction (if possible) is preferred to single-attraction.

Leaflets are most likely to be picked up locally

- 9.9 If a visitor to an attraction found out about it from a leaflet, it is very likely they picked up that leaflet not very far away. That's because many visitors turn up at a destination expecting to pick up leaflets on where to go after their arrival. If they found out about the attraction pre-trip, it is much more likely from a website. Leaflet distribution is much more cost-effective when focussed locally.

Local people play a crucial role

- 9.10 Accommodation providers in particular have a fundamental influence on where visitors go to and what they end up doing. There is clearly an opportunity to work with them.

TICs fulfil two important roles

- 9.11 TICs are an interesting 'hybrid' of local knowledge and a place to find leaflets. Some TIC visitors use them for one purpose or the other, and some use them for both

purposes. As such, TICs play an important role in visitor information provision during-trip because both leaflets and local knowledge are very influential at this stage.

Google dominates

- 9.12 Google is highly influential in directing which sites internet users visit. It is less common for users to type a specific website address into their browser, and if they do, it is likely to be a web address that they type in often and is well known to them. Search optimisation with Google is a key marketing investment to maintain.

Websites are much preferred to apps

- 9.13 In spite of the rise of apps, websites are still greatly preferred when searching for information because they are seen as more appropriate. Investment in the website and keeping it functional for mobile users appears to be more worthwhile than developing apps at this stage.

‘Tell me what’s on my own patch’

- 9.14 Welsh residents are very open to being informed what there is to see and do in their own country, and even in their own region.