

Southern Wales Travel Trade Survey

**Undertaken by Steve Reed Tourism
for
Southern Wales Tourism**

February/March 2021



Summary

This research has been commissioned by Southern Wales Tourism to look at 2 key areas:

- The views of the travel trade to the group offer (product) in Southern Wales and how the organisation can improve how it works with group organisers and all aspects of the travel trade.
- The views of the sector to how Covid-19 will impact upon and change the sector over the next few years.

The survey was taken online using Survey Monkey, the link to which was sent to 1000 of Steve Reed Tourism contacts, and then widely distributed through LinkedIn and other channels.

The original plan was to follow up the online survey with a phone conversation with a small sample. With the slow/controlled moves out of lockdown, the short period of time since the online survey means that there is unlikely to be any significantly different or more informed responses. So, this has been delayed and may be undertaken when the sector has been able to plan/undertake tours.

Respondents

In total 183 responses were received, 50% of whom described themselves as Group Travel Organisers, 41% as Tour Operators, and a further 25% Coach Operators (multiple choices were possible). The majority work with groups of over 26 participants, and most are adults of retirement age. Across the respondents there was wide range of day trips and longer stays, with visits taking place across the UK and Europe, as well as some longer trips.

The top themes for trips undertaken were cited as town/cities, trips to the coast or countryside and gardens. General and heritage tours were also popular.

Impact of Covid-19

The respondents were asked to consider a number of statements about the impact of Covid-19 on the sector. Whilst there was a lot of uncertainty, it was overwhelmingly agreed that groups will become smaller, more domestic, and possibly looking at more outdoor activities. It is however, not felt that the age profile of tour participants will change.

There were a lot of useful comments many focusing on the challenges of making tours viable with significant restrictions on the numbers that can be accommodated on a coach, as well as the potential impact of the vaccination programme. There were also

concerns about the practicalities of managing tours re the availability of suitable accommodation and the management of groups at attractions.

About Southern Wales

The majority of respondents have visited Southern Wales in the last two years, and there were positive views of majority of the elements of a visit, in particular the landscape and scenery. Areas for improvement focused mainly on the availability of accommodation for groups, in good locations and at appropriate rates.

When comparing the views across those who have visited and those who have not, there was roughly a 10% difference in perception, principally due to a level of “don’t know” responses, showing a lack of awareness of the provision. This is backed up by almost 60% of respondents having not been part of a fam visit to the area.

Over 30% of respondents felt that their perception of Southern Wales had changed for the better in the last 2 years, some citing the removal of the Severn Bridge tolls; others felt that they had become better informed about the area through fam visits and various TV programmes.

Over 60% of respondents have the area included in their future programme (or plan to), with 42% hoping to run tours in 2021 (Covid-19 restrictions permitting), 46% planning for 2022 and 12% for 2023 onwards.

Suggestions as to how Southern Wales Tourism can help for the future, included continuing to provide fam visits, regularly sending information and news, and offering support with things like contacts and images were the top suggestions; assistance in finding and working with suitable hotels was also mentioned several times.

Who was surveyed

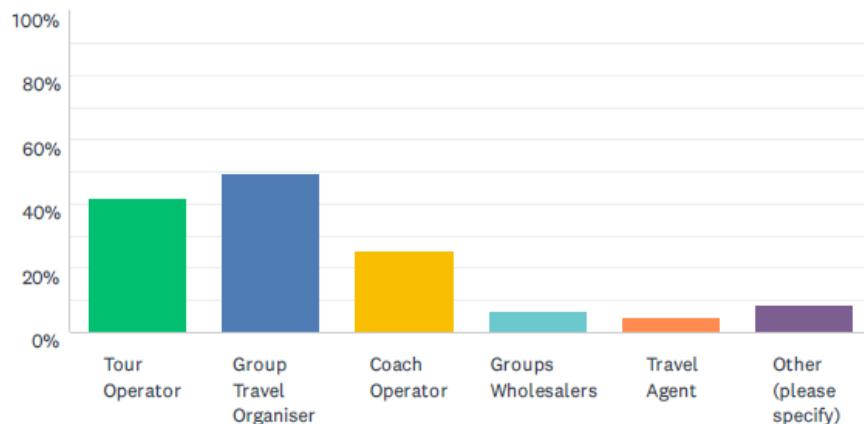
The survey link was sent to around 1000 travel trade contacts by Steve Reed Tourism and then further circulated via LinkedIn and other channels.

In total 183 responses were received; all completed the Covid-19 section, and 159 went on to complete the rest of the survey.

Almost 50% of the respondents described themselves as Group Travel Organisers, with 41% being Tour Operators and a further 25% Coach Operators. Those who ticked "other" mainly described themselves as Group Travel Organisers in some way; a few were tour guides.

Q16 Which of the following best describes your role/business? (Tick all that apply)

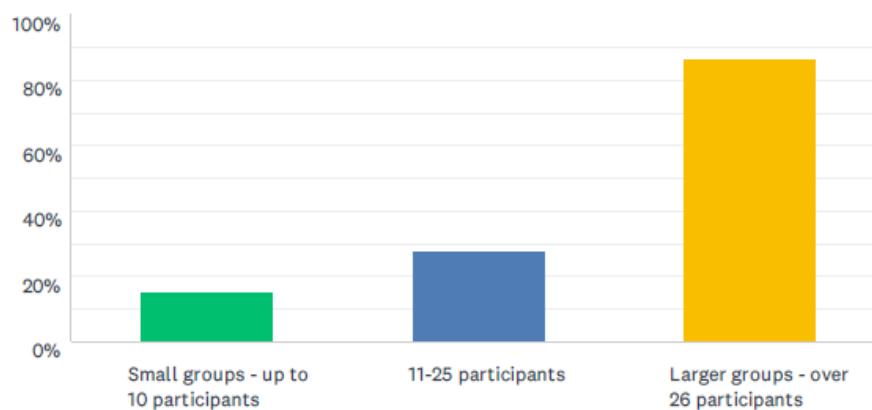
Answered: 154 Skipped: 29



The vast majority organise trips and tours for groups of over 25 participants.

Q17 What size of groups do you mainly work with (tick all that apply)?

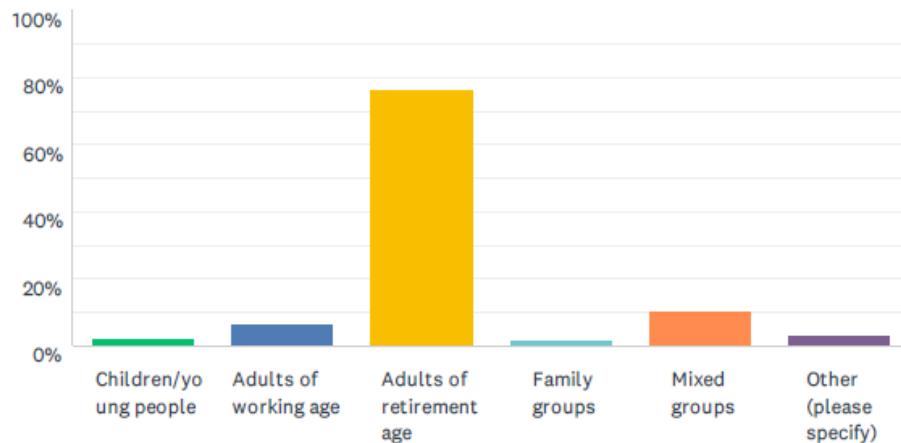
Answered: 154 Skipped: 29



They also mainly work with groups of adults of retirement age.

Q18 Which of the following best describes the majority of groups that you work with?

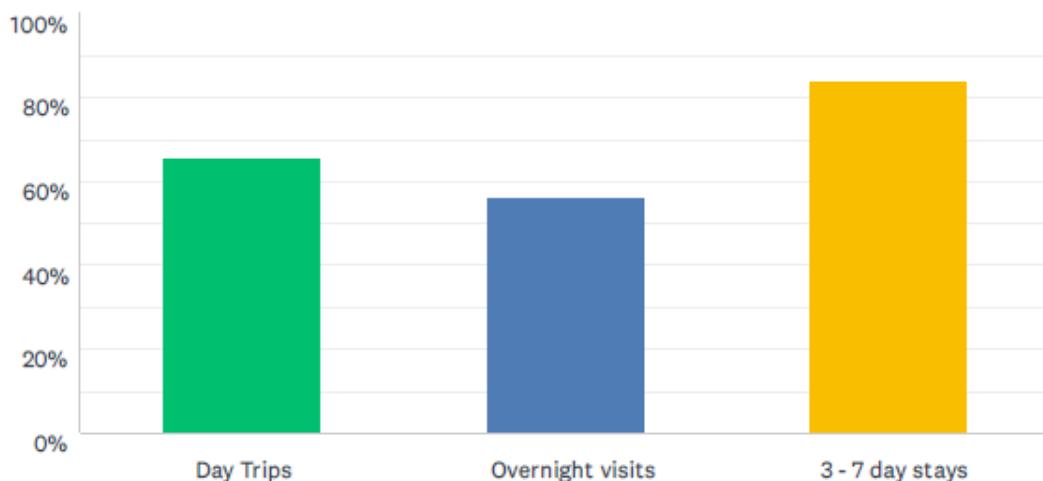
Answered: 154 Skipped: 29



The majority of respondents work across stay types (day trips, overnight visits and longer stays). When only GTO's were looked at there was a slight increase in the proportion of day trips (up to 83% from 65% across all operator types).

Q19 What type of trips do you offer? (Tick all that apply)

Answered: 154 Skipped: 29

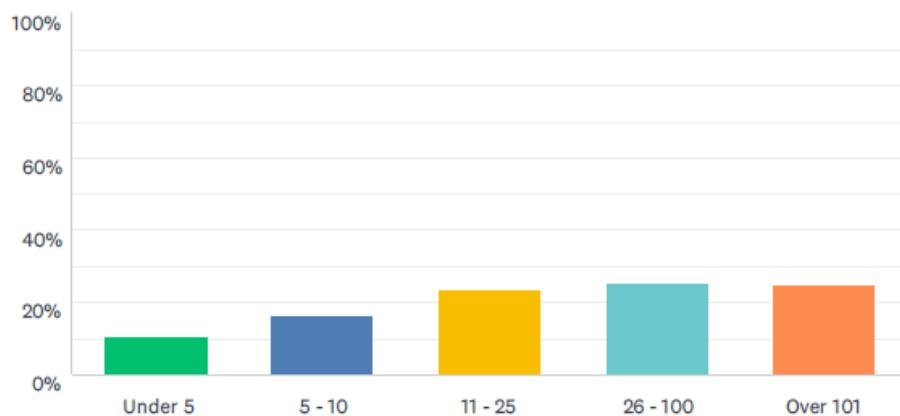


When the full sample are examined, the number of trips organised each year steadily increases so that 50% of the respondents organise over 26 tours a year.

When the GTO category is looked at specifically, there is a clear difference, with less than 25% of respondents organising over 26 tours a year, and the majority (33%) organising between 11 and 25).

Q20 Roughly how many trips do you take/organise (anywhere) in an average year?

Answered: 154 Skipped: 29



In terms of the destination of tours, it is interesting to note that Wales has a higher response than Scotland, although this may have a geographical reference re the location of the respondents and the proportion of day trips and/or short breaks that they take.

In the “other” responses there are comments re worldwide tours, and also references to this being a pre Covid-19 picture.

Q21 Where do you usually take your groups? (Tick all that apply)

Answered: 154 Skipped: 29



The high level of European tours usually undertaken highlights a potential area for growth over the coming years, whilst Covid-19 restrictions still make an impact.

Q22 What sort of trips do you organise/deliver? (Tick all that apply)

Answered: 154 Skipped: 29

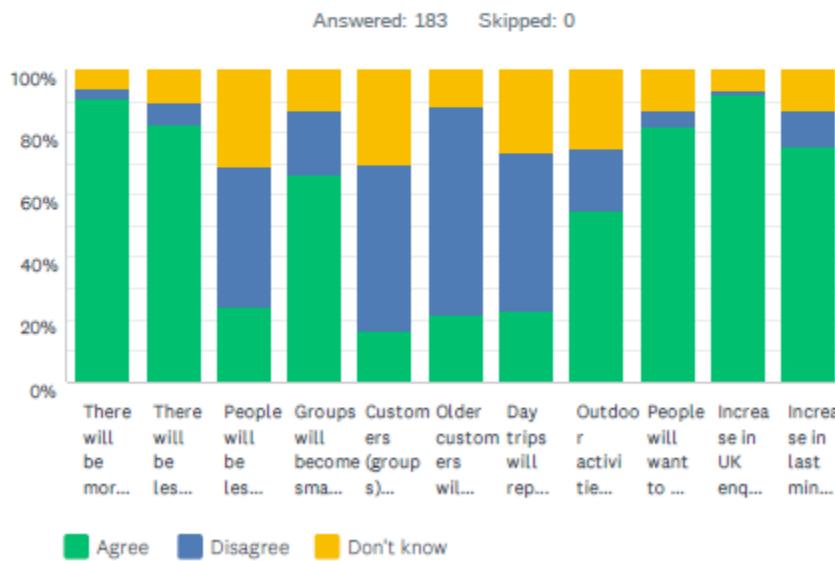


The themes of tours undertaken by the respondents gives a very positive picture for Southern Wales – in that heritage, towns/cities, coast/countryside and gardens are the dominant topics. These are all sectors where Southern Wales has a really strong selection of products which could be used by groups. Comments in response to “other” also show product areas where Southern Wales has the potential to match the needs for operators preferred tours.

- Shows, nice hotels with nice food, eating out and entertainment at hotels.
- Steam railways, Museums, Theatres, Concerts, historic houses, river cruises.
- We specialise in visiting local breweries and classic pubs, industrial archaeology (especially heritage railways (we have visited the "Great Little Trains of Wales" many times)) and 'quirky' museums. To be able to take our clients through great scenery such as Wales offers is an obvious plus (we will often take our coach via the scenic route rather than the most direct route to our destination).
- Industrial visits and Christian heritage.

Impact of Covid-19

Q1 What impact do you feel that Covid-19 will have on your group market over the next 2-5 years? Do you agree or disagree with the following statements?



Key points from this are:

- There will be more domestic travel.
- It is unclear if group travel will be a popular option or not.
- There are likely to be smaller groups.
- The traditional age profile of group travels is unlikely to change significantly.
- Outdoor experiences are likely to become more popular.
- Visitors will be looking for new experiences and will be booking later.

Q2 Are there other immediate or longer term trends that you can see impacting on your business (positive or negative)?

Answered: 139 Skipped: 44

This open question resulted in a wide range of interesting responses:

- *Feasibility of coaches and how they are going to manage and change things. Costs may become prohibitive if we are restricted on coach numbers.*
- *I think competition for hotel & attraction space from the increased domestic market will decrease capacity for the discounted group space, either driving prices up or reducing capacity. Less of an issue where the domestic increase is filling absent international inbound tourism.*

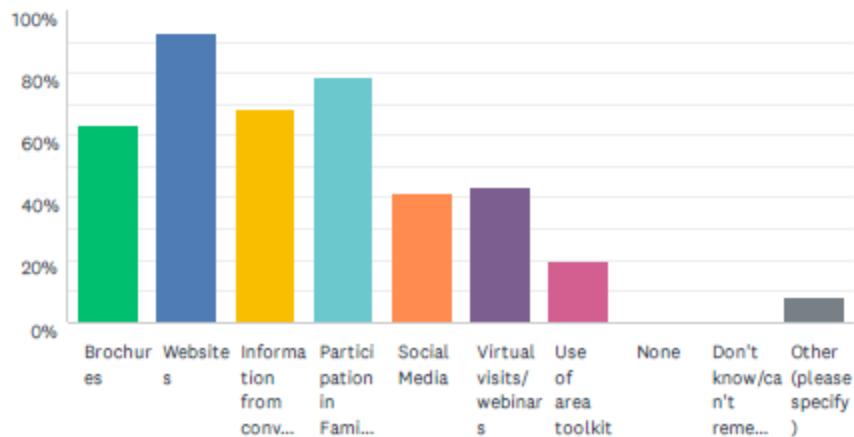
- Possibly issues with venues whereby groups have to be separated and perhaps made smaller to allow for social distancing. This will impact on itineraries and timings.
- Many coach companies have gone into liquidation, so there may be a shortage of transport.
- The need for vaccine passports.
- More people preferring to go self catering and motor home ownership.
- Short term I think there will be a reluctance to travel in groups and also stay overnight. However once the vaccine rollout is complete hopefully some sort of normality will return and providing this is the case 2022 should be more or less normal but with folk wanting to go abroad getting back to pre-pandemic numbers.
- Social distancing on board vehicles limits the number of passengers and hence profitability of trips/holidays. Risk of new variants leading to further lock down or reluctance to travel. Slight risk of hotels being seen as a source of mixing with others from outside our (elderly) groups and hence risk of our group members becoming ill - you wouldn't go somewhere if you knew the flu virus was there? Remains to be seen how this pans out, depending on cases/examples. Hotels must ensure they have strict measures in place to counter this, even if it doesn't happen.

In summary, there are:

- Queries re the use of Vaccination Passports – and a belief that confidence will return upon completion of the vaccination programme.
- Concerns re the viability of groups with restricted numbers on coaches and the challenges of people having to travel with masks.
- Challenges are identified re managing groups at attractions and hotels, possibly increasing visit times.
- Concerns are expressed re a potential lack of hotel availability due to increasing domestic independent travel, as well as the potential increase in hotel prices (and reluctance to accept group bookings which traditionally have a lower return per person).

Q3 In light of changing circumstances with Covid-19, which of the following, if any, would you use when planning a group trip? (Tick all that apply)

Answered: 183 Skipped: 0



As could have been expected, websites continue to be the top resources when planning a visit. Participation in fam visits continues to be popular, and in the “other” section comments about individually, tailored fam visits (as opposed to group visits) are highlighted as an effective way of researching new areas.

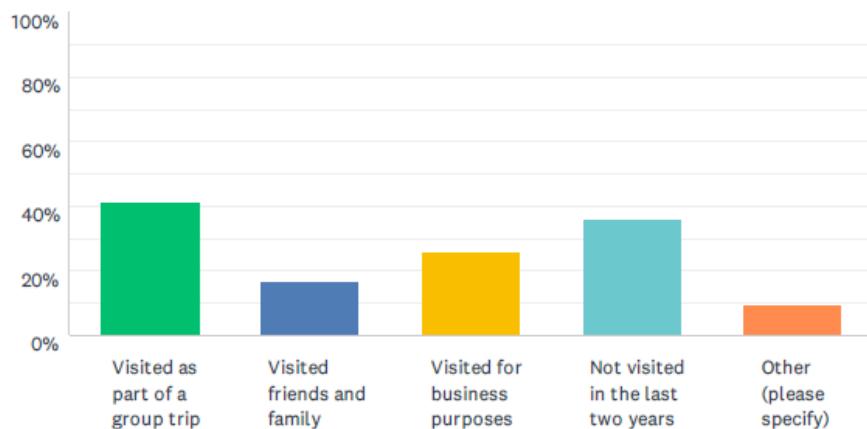
Arm's length approaches to sharing information such as social media, toolkits, and webinars appeal to less than 50% of respondents.

Looking at the open responses, word of mouth and personal recommendations are top, with personalised/one to one fam visits second. Also magazine features and regular e-mail communications (about what is new) are strongly mentioned.

About Southern Wales

Q4 Have you visited Southern Wales in the last two years for any of the following purposes? (Tick all that apply)

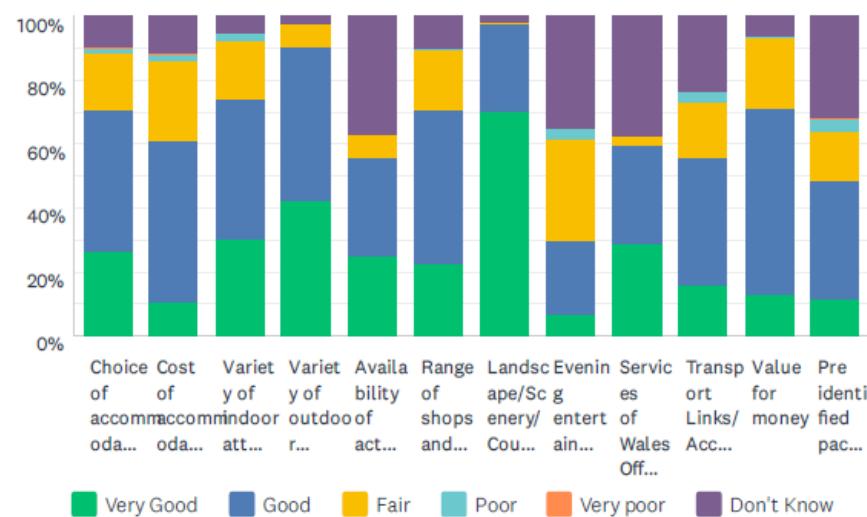
Answered: 159 Skipped: 24



In the open response section, most of the 15 respondents had either visited Southern Wales for a different reason (such as rugby) or were resident in the region. In looking at the subsequent questions, it is interesting that around 1/3 of respondents have not visited the area, and so are putting forward their perceptions.

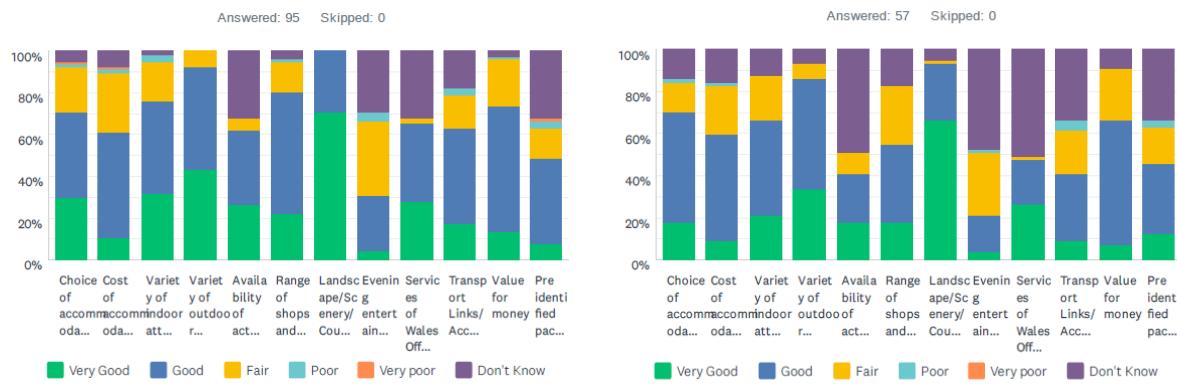
Q5 How good or poor would you say Southern Wales is as a destination for group trips on each of the following dimensions. Please rate the provision in Southern Wales.

Answered: 159 Skipped: 24



It is noticeable that the perception of the landscape and scenery is extremely positive, with over 97% rating it as good or particularly good. By contrast the poor perception of evening entertainment provision is also very clear, with less than 30% seeing it as good or very good.

The area is seen to offer a value for money option, with good accommodation options and attractions both indoors and outdoors. Perhaps surprisingly when the view about the landscape is so positive, there is a relatively low perception of the activities available. This aspect, along with the availability of WOTGA guides and pre identified tours are areas for potential activity in the future.



The charts above show the perceptions of the area by those who have visited in the last 3 years (on the left) and those who have not (on the right). Whilst the patterns are remarkably similar, there is a general (roughly) 10% reduction in the grading of the different aspects of the area, and a 10% “don’t know” – showing that there is the opportunity to increase the perception of the area by informing the sector as a whole.

Q6 Would you like to make any other comments about the product available for Travel Trade across Southern Wales?

Answered: 76 Skipped: 107

This section generate a diverse range of responses, and it was pleasing to see positive comments about the support given by the Southern wales team and the benefits of fam visits.

- *Wales (including South Wales) has been our fastest growing UK area for group travel over the past few years. I firmly believe this is due in large part to the fantastic drive by the tourist board to increase awareness of their product and the overall quality of accommodation/service - particularly to coach groups.*

However, of more concern are a number of comments about the challenges of finding the right hotels (at the right price) across the area. For instance:

- *I find the biggest problem for our groups is choice of hotels for older groups, adequate to their standard and needs and that require large number of single rooms. Unless we are looking at Cardiff, the rest of southern and Southwest wales is very difficult when having to look for an adequate hotel at a reasonable cost.*
- *Hotels are limited and very expensive in South Wales.*
- *Coach friendly hotels aren't plentiful and can be expensive. But the hotels we have worked with are very good at providing group services Information packs from Tourist Sites in South Wales would be great for making group bookings for boats, trains and other attractions etc.*

There were also comments about the need for information and provision re coach parking and refreshment/toilet stops. Whilst there were positive comments about the positive service by Southern Wales, there were also apparent gaps in the coverage, that offer opportunities for future activities.

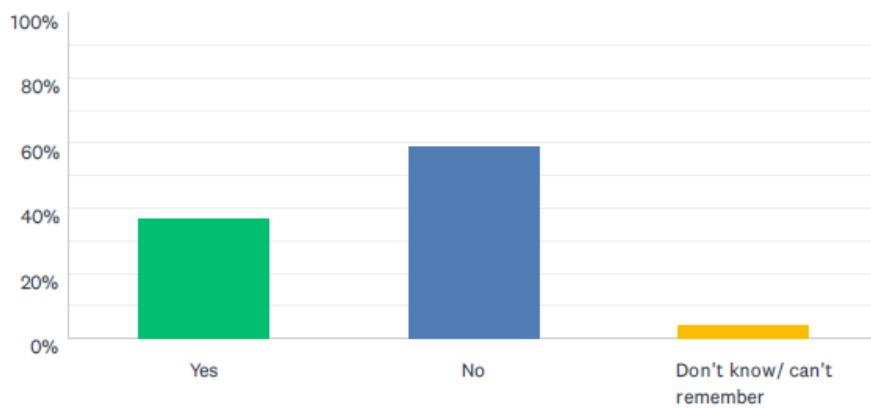
- *I don't think I have seen any cross county itinerary ideas. Themed garden visits for example. Maybe I am not looking in the right places.*
- *I don't seem to receive much info about Southern Wales - would be good to receive regular communication, perhaps a monthly newsletter (email).*

There were also a few comments about the ability of the sector to work with the group market, re timing, pricing etc.

- *Attractions need to have their rates available for groups over a year ahead. attractions need to be responsive and reply to emails and calls, even in covid attractions need to be taking group reservations for 2021, and if they are shut...then we as a tour operator are shut, so why are they saying they don't know, or cannot take group bookings this year. producing our brochure for 2021 was a nightmare last autumn, with little support from attractions. now planning 2022, and they don't even have rates or info for this year! pathetic. sorry rant over. this is all UK not just Wales!!*

Q7 Have you taken part in a familiarisation visit with Southern Wales Tourism? (That is a visit to Southern Wales organised by a member of the Southern Wales Tourism team).

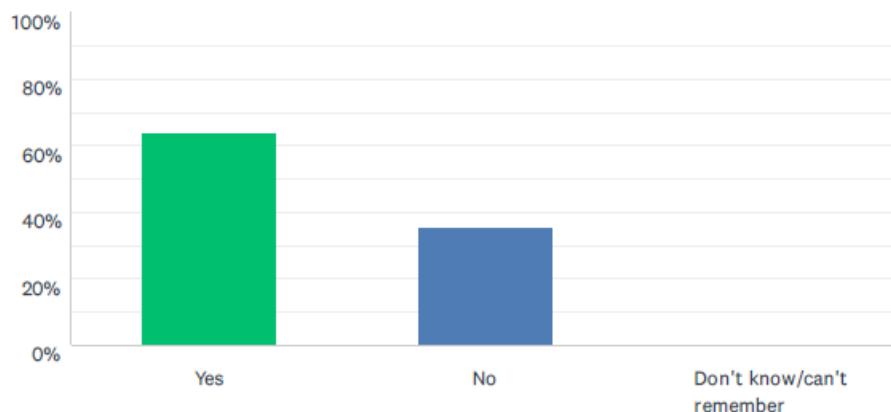
Answered: 159 Skipped: 24



The opportunity to work with more businesses across the sector is clearly shown by this response.

Q8 Have you booked a group trip to Southern Wales in the last three years?

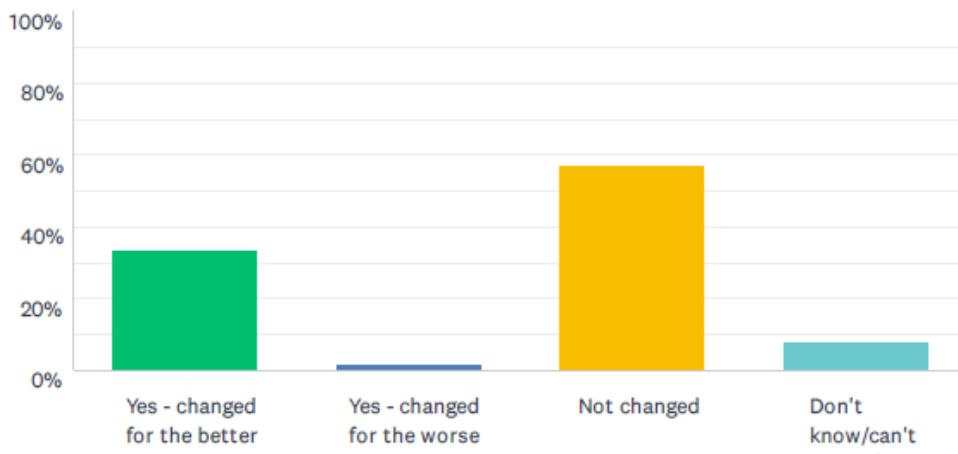
Answered: 158 Skipped: 25



With over 60% of respondents having booked a visit to Southern Wales in the last 3 years, it appears to be a positive position. Of course, whilst the survey did highlight the area being covered, there may be some that have included areas such as Pembrokeshire in their understanding of the region.

Q9 Do you think that your perceptions of Southern Wales as a destination for group trips has changed in the last two years?

Answered: 159 Skipped: 24



This response is generally positive.

Q10 In what ways has the area improved for the better?

Answered: 95 Skipped: 88

Whilst the removal of the Severn Bridge tolls has been cited by a few as a positive change, many comments that their perception has been improved by finding out more about the area, through fam trips and also through things like TV programmes, showing the need to keep communicating and to keep offering fam visits.

- *My perception has changed for the better because we found on the familiarisation that there is so much to do that would cater for a wide range of interests and physical abilities.*
- *It's more that I have been aware of more communication and so have an improved knowledge and view of Southern Wales as a group destination.*
- *Unusual destinations such as Hensol distillery, Cyfarthfa Castle, Welsh Valleys that I was previously unaware of.*
- *Better publicity & TV programmes featuring the region.*

There were some comments about specific developments, with the Royal Mint mentioned several times:

- *Tourist friendly and becoming much more receptive to group business. Would like to see more single rooms and walk in showers at hotels!*
- *More choice of hotels and attractions to visit such as The Royal mint.*

- *Better road network the Heads of the Valleys Improvements to visitor attractions, especially Cardiff & Cardiff Bay area.*
- *Reduced industrial landscape. Improvement in road network.*

Q11 In what ways has the area changed for the worse?

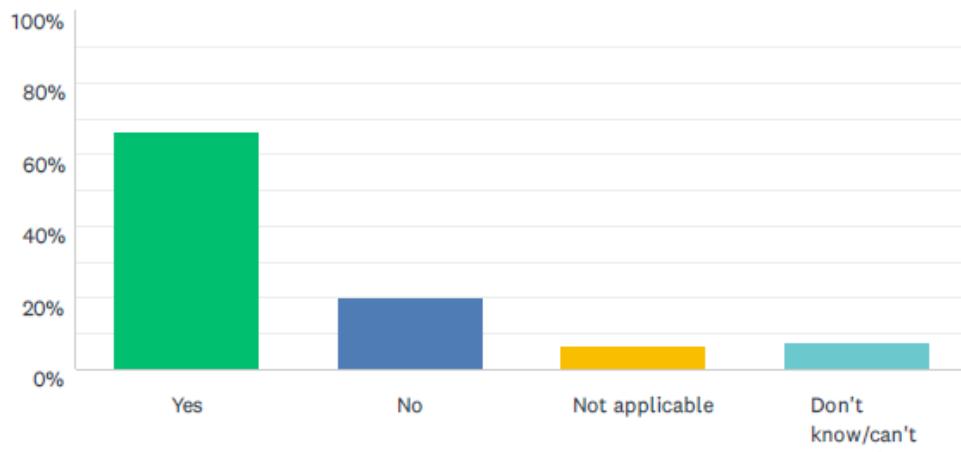
Answered: 76 Skipped: 107

There were very few negative comments, and those that were made focused on congestion (M4 and Cardiff) and some poor accommodation/hospitality experiences. And of course, the weather was mentioned!

- *The weather hasn't changed - it always rains!!*

Q12 Is Southern Wales on your current and/or future coach tour programmes?

Answered: 159 Skipped: 24



Q13 If Yes, when is the visit likely to take place?

Answered: 118 Skipped: 65

travel July Hopefully early Covid August trip Autumn 2021 June
next years 2023 venues Cardiff April year October 2021
2022 onwards 2021 Tenby tours Summer 2021 groups x
booked October visits put September 2020 will time

There were numerous comments about the need to wait until Covid-19 restrictions allow, however, for those who put forward a timeline, 42% hope to run a tour(s) during 2021 (from July onwards), 46% were planning for 2022 and 12% were looking to 2023 and onwards before running a trip to Southern Wales.

Q14 If No, what would encourage you to put Southern Wales on your programme?

Answered: 60 Skipped: 123

This question didn't generate any significant insights. The responses were about the availability of more information about the area, the offering of fam visits and the availability of good hotels at decent rates.

- *If I were to visit myself on a Fam trip or similar, this would help as I am always more comfortable promoting an area I have some, even if only fairly limited, knowledge of.*
- *A decent familiarity trip so I could see what would be suitable for my group.*
- *Familiarisation visit. Was planning a personal tour last year and never got there due to Covid, so would be very interested in visiting at some point when allowed.*
- *A better picture of what is on offer for people of more mature years and as with age comes mobility limitations.*
- *Good in depth hotel guide to the area. A guide that offer attractions that truly reflect the area and unique things to the area.*
- *I will do more research on the area - sample itineraries suitable for older groups.*
- *Great rates and support.*
- *Hotel safety and coach passenger numbers.*

Q15 In these ever changing times, how can Southern Wales Tourism help you to develop your businesses/tours to this area?

Answered: 103 Skipped: 80

itineraries promote places trips area see visit interested good
South Wales Keep bookings groups fam visits
Fam trips coach hotels sure information taking
tours useful attractions market Provide accommodation

The responses focused on fam visits and keeping contacts up to date with itineraries, attractions, and other new developments – a general theme of “keep in touch” ran through most comments. There were also comments about offering interesting and/or tailored itineraries and making images easily available for use in promotional activities.

- *By keeping me and tour planners like me informed as best you can.*
- *Keep in touch, keep updated on developments and keep knocking on doors. Now is a great time to get product out to overseas agents. Everyone is taking time to re-vamp itineraries and it is a great opportunity to re-set and get Southern Wales featured.*
- *Itinerary suggestions, promotional material, images.*
- *By keeping me and tour planners like me informed as best you can*
- *More fam trips please to hidden gem areas.*
- *Just ensure we are kept up to date especially on new attractions.*
- *Continue to provide good literature and suggest itineraries.*
- *FAM trips for active Group Travel Organiser Associations such as the New Meridian Association on south coast*
- *South Wales Tourism need to be at the trade shows.*
- *Keep feeding tour operators/agents/wholesalers with the best free-for-use images to promote your region and convince the various attractions to do a similar thing - the only negative about Wales is we always struggle visually when it comes to creating our brochure, other regions (e.g. Scotland, Ireland) have a very strong image bank.*
- *Keeping in through mailshots , emails and video links as well as fam visits -- virtual and real ! We can never have too much information*

The challenges of finding and communicating with suitable hotels was another strong theme, supported by encouraging businesses to work with the trade when looking 2 or even 3 years ahead.

- *I personally have a problem with my group finding suitable hotel accommodation for singles at a reasonable cost without the heavy supplement.*
- *To be more helpful to groups and understand that we travel in large coaches and need drop off points and places to park with facilities for our drivers to rest.*
- *Get everyone to commit to helping tour operators, keep rates keen, and open up bookings over a year ahead. also strange some hotels will only just be taking bookings for 2022 now, and then they say full, so I say can I book for 2023.
Answer - not far too early!*
- *Providing details of group-friendly hotels in town centres (our clients want to explore the town they are staying in (try the pubs and restaurants as well as cultural offerings) without having to take taxi / public transport from the hotel). We would also be interested in details of the region's Industrial Archaeology, although the tour organisers are knowledgeable about this subject. In the main, South Western Tourism professionals undoubtedly "know their subject" and talking to them would be helpful in planning our next visit to Wales!*



This project has received funding via the Regional Tourism Engagement Fund (RTEF) and supported through the Welsh Government Rural Communities – Rural Development Programme 2014-2020, which is funded by the European Agricultural Fund for Rural Development (EAFRD) and the Welsh Government, the Fund to improve the visitor experience and create stronger destinations by working together.

Appendix 1 - Questions

Southern Wales Tourism - Travel Trade Survey

Good day.

Steve Reed from Steve Reed Tourism here. We've worked with Southern Wales Tourism for the last 6 years or so, and we'd now like to ask your opinion on this beautiful part of the country, your thoughts on how the product could be improved and what you think will be the impact of the current Covid-19 pandemic. This should take no more than 10 minutes and will inform future investments.

Thank you greatly for your help – all respondents will be considered for attendance at future showcase and familiarisation events in Southern Wales.

Southern Wales Tourism is responsible for marketing the area to the travel trade across the UK and overseas. They cover the area between the Wye Valley in the east and Bridgend in the west, and from Merthyr Tydfil to Cardiff.

Southern Wales Tourism want to understand the main issues businesses are facing in the current situation, hear predictions for the future and ideas on the levels of support required going forward to assist with the business recovery. We also want to understand your awareness and attitudes towards Southern Wales as a destination for group trips.

For your information on Southern Wales please visit www.visitsouthernwales.org

* 1. What impact do you feel that Covid-19 will have on your group market over the **next 2-5 years**? Do you agree or disagree with the following statements?

	Agree	Disagree	Don't know
There will be more domestic travel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There will be less international travel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People will be less inclined to travel in groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Groups will become smaller	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customers (groups) will be younger	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Older customers will be less inclined to travel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Day trips will replace residential trips	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor activities will become more popular	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People will want to try new things (experiences, destinations, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase in UK enquiries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase in last minute bookings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Are there other immediate or longer term trends that you can see impacting on your business (positive or negative)?

* 3. In light of changing circumstances with Covid-19, which of the following, if any, would you use when planning a group trip? (Tick all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Brochures | <input type="checkbox"/> Virtual visits/webinars |
| <input type="checkbox"/> Websites | <input type="checkbox"/> Use of area toolkits or similar |
| <input type="checkbox"/> Information from conventions/shows | <input type="checkbox"/> None |
| <input type="checkbox"/> Participation in Familiarisation Visits | <input type="checkbox"/> Don't know/can't remember |
| <input type="checkbox"/> Social Media | |
| <input type="checkbox"/> Other (please specify) | |

Southern Wales Tourism - Travel Trade Survey

About Southern Wales

* 4. Have you visited Southern Wales in the last two years for any of the following purposes? (Tick all that apply)

- Visited as part of a group trip
- Visited friends and family
- Visited for business purposes
- Not visited in the last two years
- Other (please specify)

Tell us what you think about Southern Wales as a destination for group trips. It doesn't matter if you have no personal experience of Southern Wales, we'd like to know your opinion / perception of what you think it would be like.

* 5. How good or poor would you say Southern Wales is as a destination for group trips on each of the following dimensions. Please rate the provision in Southern Wales.

	Very Good	Good	Fair	Poor	Very poor	Don't Know
Choice of accommodation	<input type="radio"/>					
Cost of accommodation	<input type="radio"/>					
Variety of indoor attractions (e.g. Museums, Themed Attractions, etc.)	<input type="radio"/>					
Variety of outdoor attractions (e.g. Gardens, Castles, etc.)	<input type="radio"/>					
Availability of activities (e.g. walking, cycling, water sports)	<input type="radio"/>					
Range of shops and restaurants	<input type="radio"/>					
Landscape/Scenery/Countryside	<input type="radio"/>					
Evening entertainment	<input type="radio"/>					
Services of Wales Official Tour Guides (WOTGA)	<input type="radio"/>					
Transport Links/Accessibility	<input type="radio"/>					
Value for money	<input type="radio"/>					
Pre identified packages/itineraries	<input type="radio"/>					

6. Would you like to make any other comments about the product available for Travel Trade across Southern Wales?

* 7. Have you taken part in a familiarisation visit with Southern Wales Tourism? (That is a visit to Southern Wales organised by a member of the Southern Wales Tourism team).

- Yes
- No
- Don't know/ can't remember

8. Have you booked a group trip to Southern Wales in the last three years?

- Yes
- No
- Don't know/can't remember

* 9. Do you think that your perceptions of Southern Wales as a destination for group trips has changed in the last two years?

- Yes - changed for the better
- Yes - changed for the worse
- Not changed
- Don't know/can't remember

10. In what ways has the area improved for the better?

11. In what ways has the area changed for the worse?

* 12. Is Southern Wales on your current and/or future coach tour programmes?

- Yes
- No
- Not applicable
- Don't know/can't remember

13. If Yes, when is the visit likely to take place?

14. If No, what would encourage you to put Southern Wales on your programme?

15. In these ever changing times, how can Southern Wales Tourism help you to develop your businesses/tours to this area?

Southern Wales Tourism - Travel Trade Survey

About your business/organisation

* 16. Which of the following best describes your role/business? (Tick all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Tour Operator | <input type="checkbox"/> Groups Wholesalers |
| <input type="checkbox"/> Group Travel Organiser GTO | <input type="checkbox"/> Travel Agent |
| <input type="checkbox"/> Coach Operator | |
| <input type="checkbox"/> Other (please specify) | |

* 17. What size of groups do you mainly work with (tick all that apply)?

- | |
|---|
| <input type="checkbox"/> Small groups - up to 10 participants |
| <input type="checkbox"/> 11-25 participants |
| <input type="checkbox"/> Larger groups - over 26 participants |

* 18. Which of the following best describes the majority of groups that you work with?

- | |
|--|
| <input type="radio"/> Children/young people |
| <input type="radio"/> Adults of working age |
| <input type="radio"/> Adults of retirement age |
| <input type="radio"/> Family groups |
| <input type="radio"/> Mixed groups |
| <input type="radio"/> Other (please specify) |

* 19. What type of trips do you offer? (Tick all that apply)

- | |
|---|
| <input type="checkbox"/> Day Trips |
| <input type="checkbox"/> Overnight visits |
| <input type="checkbox"/> 3 - 7 day stays |

* 20. Roughly how many trips do you take/organise (anywhere) in an average year?

- | | |
|----------------------------------|-----------------------------------|
| <input type="checkbox"/> Under 5 | <input type="checkbox"/> 26 - 100 |
| <input type="checkbox"/> 5 - 10 | <input type="checkbox"/> Over 101 |
| <input type="checkbox"/> 11 - 25 | |

21. Where do you usually take your groups? (Tick all that apply)

- | | |
|--|----------------------------------|
| <input type="checkbox"/> UK wide | <input type="checkbox"/> Wales |
| <input type="checkbox"/> England | <input type="checkbox"/> Ireland |
| <input type="checkbox"/> Scotland | <input type="checkbox"/> Europe |
| <input type="checkbox"/> Other (please specify)
<div style="border: 1px solid black; height: 30px; width: 100%;"></div> | |

*** 22. What sort of trips do you organise/deliver? (Tick all that apply)**

- | | |
|--|---|
| <input type="checkbox"/> Heritage Tours | <input type="checkbox"/> Food and Drink |
| <input type="checkbox"/> Walking/activity tours | <input type="checkbox"/> Trips around Events or Festivals |
| <input type="checkbox"/> Trips to towns or cities | <input type="checkbox"/> General Tours |
| <input type="checkbox"/> Trips to coast or hills/countryside | <input type="checkbox"/> Fully inclusive tours |
| <input type="checkbox"/> Mystery Tours | <input type="checkbox"/> Bespoke/customised tours |
| <input type="checkbox"/> Gardens | |
| <input type="checkbox"/> Other (please specify)
<div style="border: 1px solid black; height: 30px; width: 100%;"></div> | |

23. Would you be happy to speak to Steve Reed (from Steve Reed Tourism) to explore these issues in more detail? If Yes, please put your contact details here:

Name

Company Name

Phone Number

E mail

Southern Wales Tourism - Travel Trade Survey

End of Survey

Thank you for taking the time to complete this survey.

For further information about group visits to Southern Wales please [click here](#). Alternatively take some inspiration from our [2020 Group Buyer Showcase event video here](#).



This project has received funding via the Regional Tourism Engagement Fund (RTEF) and supported through the Welsh Government Rural Communities – Rural Development Programme 2014-2020, which is funded by the European Agricultural Fund for Rural Development (EAFRD) and the Welsh Government, the Fund to improve the visitor experience and create stronger destinations by working together.