

Research Report

Wales Visitor Survey 2019

Monmouthshire County
Council



Prepared for:
Monmouthshire County Council

Prepared by:
Beaufort Research



Contact Details

Agency contact: Fiona McAllister/Catrin Davies

Date: February 2020

Beaufort Research

2 Museum Place
Cardiff
CF10 3BG

(029) 2037 8565

enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk

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Contents

- 1. Executive summary 1
- 2. Aims and objectives..... 5
- 3. Methodology..... 6
- 4. Research findings..... 7
 - 4.1 Visitor profile..... 7
 - 4.2 Trip profile11
 - 4.3 Motivations for visiting and activities undertaken.....12
 - 4.4 Satisfaction with overall experience, revisiting and recommending.....16
 - 4.5 Attractions visited and Monmouthshire’s strengths.....20
- Appendix I: Detailed list of survey locations..... 1
- Appendix II: Stage 1 survey questionnaire (face-to-face interviews) 3
- Appendix III: Stage 2 survey questionnaire (telephone interviews) 4

1. Executive summary

1.1 Introduction

This report focuses on **visitors within Monmouthshire unitary authority area**. **677** interviews were conducted at Stage 1 and a further **345** were conducted at Stage 2 with visitors to 4 locations in Monmouthshire (see page 5).

This formed part of the 2019 Visit Wales Visitor Survey, which involved two stages of interviewing across Wales: **Stage 1** was a face-to-face survey, followed by a **Stage 2** telephone interview (post-visit). **7,683** face-to-face interviews were conducted at Stage 1, and **3,909** telephone interviews were conducted at Stage 2. Throughout the report, comparisons have been made with the all Wales sample.

The data was weighted at the analysis stage to reflect the proportion of UK day, UK staying and overseas visitors within the region. Fieldwork took place between 4 May and 22 November 2019.

1.2 Key findings

Visitor profile:

Just over half of visitors to Monmouthshire are from Wales (55%), which is slightly lower than for Wales as a whole (69%). Following on from this, Monmouthshire as a whole receives considerably more visitors from outside of Wales compared to all sites across Wales (44% cf. 27% all Wales); this is probably due to Monmouthshire's proximity to England. One in twenty visitors to Monmouthshire live overseas which is in line with the all Wales average (5% cf. 4% all Wales).

Overall, there are higher proportions of older people aged over 55 visiting Monmouthshire compared to the overall Wales average (46% cf. 37%). The proportion of younger visitors to Monmouthshire is in line with the proportion across Wales as a whole (23% cf. 24%) but the proportion of middle-aged visitors (aged 35-54) is lower in Monmouthshire compared to the rest of Wales (31% cf. 39%). Abergavenny attracts the highest proportion of younger people aged 16-34 (29%), while Tintern Abbey attracts the highest proportion of older visitors aged over 55 (52%).

Most visitor groups to the Monmouthshire County area are either visiting as a couple (38%) or visiting alone (21%). These proportions are considerably higher than the all Wales profile, where 27% had been visiting as a couple and only 11% were visiting alone. Conversely the proportion of families with young children visiting Monmouthshire was half that of the all Wales average (14% cf. 28%).

The average number of people in each visiting party is 3.1 (2.7 adults and 0.4 children), which is lower than the all Wales average of 3.7 (2.8 adults and 0.9 children). This is being driven by the lower number of children visiting Monmouthshire (0.4 cf. 0.9 on average across Wales).

Trip profile:

The vast majority of visitors to Monmouthshire were on a day trip when interviewed (90%); this was in line with the all Wales average of 89%. As might be expected, the majority of day visitors to Monmouthshire lived in Wales (59%), although a sizeable proportion came from the rest of the UK (40%); only 4 day visitors lived abroad. The remaining 10% of visitors to Monmouthshire were staying in Wales, most commonly on a short break (6%) - short-break visitors tended to live in the rest of the UK. The average number of nights stayed was equal to the all Wales average (6.1).

Motivations for visiting and activities undertaken:

Visitors to Monmouthshire were most likely to have come to the area to visit historical and religious sites or attractions (41%); this rose to 59% of visitors to Chepstow and 76% of visitors to Tintern Abbey. This was also slightly more likely to be mentioned by visitors to Monmouthshire than visitors to Wales as a whole (36%). In addition, Monmouthshire County visitors were considerably more likely to say they were visiting to go shopping than visitors across Wales as a whole (40% cf. 15%); this is mainly driven by visitors to Abergavenny and Monmouth town centre as 60% and 61% respectively gave this as their reason for visiting. Over a third of visitors to Monmouthshire came to the area to enjoy the landscape / countryside (37%). This reason seems slightly less important to Monmouthshire visitors compared to visitors to other parts of Wales as over half said it was their reason for visiting on average (55%).

Looking in more detail at the specific activities undertaken by visitors interviewed in Monmouthshire; the most popular activities was general sightseeing and visiting a castle or other historic attractions (25% for each). The latter is driven primarily by the fact that Tintern Abbey and Chepstow were two of the interviewing locations in Monmouthshire (49% and 44% respectively visited a castle or other historic sight). This is also why a higher proportion than average visited a religious site (15% cf. 6% on average across Wales). Around one in eight visitors to Monmouthshire visited a museum or heritage centre which was in line with the all Wales average (11%). Visitors to Monmouthshire were considerably less likely to visit a country park or forest park than visitors to Wales as a whole (11% cf. 23%).

Satisfaction with the overall experience, revisiting and recommending:

In general, visitors to Monmouthshire County were highly satisfied with their visit, as was the case among visitors across all of Wales. On a scale of 1 to 10, where 1 was 'very dissatisfied' and 10 was 'very satisfied', almost eight in ten of visitors to

Monmouthshire (78%) gave a score of either 9 or 10 for *Wales overall as a place to visit* – the average score was 9.3/10 (equal to the all Wales mean score). A further 22% gave more moderate scores of between 5 to 8 / 10, and none were dissatisfied with their visit.

Their trip to / in Wales exceeded expectations for two fifths of visitors to Monmouthshire, with 40% saying that it was better than expected; this rose to 53% amongst visitors to Chepstow and 49% for Tintern Abbey visitors, but was lower for visitors to Monmouth and Abergavenny (23% and 37% respectively). Almost six in ten felt that their expectations had been met (59%). Less than 1% of visitors to the region said that their trip was not as good as expected.

Virtually all visitors to Monmouthshire said they were likely to return in future (97%); 90% said they would definitely visit again (the same as the all Wales average), while 7% would probably visit again (cf. 7% all Wales). Higher proportions said they would definitely return at Abergavenny compared to the other sites (99% cf. 87% at Monmouth, 84% at Chepstow and 85% at Tintern Abbey).

Reflecting the high levels of visitor satisfaction and strong likelihood of returning to Wales in future, almost all visitors to Monmouthshire said that they would recommend it as a place to visit (99%); 94% would definitely recommend, and 5% would probably recommend Wales to friends and family. Less than 2% said that they probably or definitely would not recommend Wales as a place to visit (very small number of visitors to Abergavenny and Tintern Abbey).

Attractions visited and Monmouthshire's strengths:

Visitors to the four sites in Monmouthshire who were interviewed at Stage 2 were asked a series of questions specifically about Monmouthshire.

Firstly, they were asked which attractions they visited during their last trip to Monmouthshire (they were told that Monmouthshire is the county where they were interviewed). Participants were asked about each attraction in turn. Unsurprisingly, the most visited attraction was Tintern Abbey mentioned by over a third of visitors overall (37% - this rose to 82% of visitors interviewed at Tintern Abbey). Over a third of visitors had visited Chepstow Castle (36%) – this rose to 65% of those visiting Chepstow. Just under three in ten visitors had visited the Wye Valley and the Brecon Beacons (29% and 28%), while around one in five visited Abergavenny's Food festival (21% - this rose to 46% of those interviewed at Abergavenny). Under one in five had visited Abergavenny's Castle and museum and Raglan Castle (18% for each), while one in seven visited the Old Station in Tintern and St Mary's Priory Church and Tithe Barn in Abergavenny (14% for each).

Visitors were then asked to what extent they agreed or disagreed with a series of statements about Monmouthshire.

Visitors were most likely to strongly agree that Monmouthshire is a great place for walking and being out in the countryside (82% strongly agreed and 11% agreed slightly). Over three quarters of visitors (78%) also agreed strongly that Monmouthshire was a great place to visit castles and other heritage sites; this is due to the high number of castles and historic sites in the county (see list at p. 21). Over half of visitors (53%) agreed strongly that Monmouthshire was a great place for cycling and other outdoor activities. However, over a quarter said they did not know. This is probably because few visitors had been cycling or had taken part in outdoor activities during their recent visit.

Around half (49%) agreed strongly that Monmouthshire had high quality local food and drink, while a third (33%) agreed slightly with this statement. 3% disagreed with this statement.

For the last two statements the proportion saying they did not know was high – 44% felt they did not know if Monmouthshire was a great place for attending or participating in sporting events while 53% did not know if Monmouthshire was a great place for learning new skills. This suggests that visitors have less experience of these activities whilst in Monmouthshire, so they are not necessarily activities that visitors associate with Monmouthshire.

Finally, visitors were asked what could improve the visitor experience in Monmouthshire. The question was unprompted, and visitors could mention as many reasons as they wished. Almost one in five visitors (18%) said nothing could have improved the visitor experience while a further 7% made only positive comments about their experience visiting Monmouthshire.

Over a third of visitors (36%) could not think of specific improvements to make to the visitor experience. Therefore, the individual suggested improvements were made by relatively small proportions.

The suggestion made by the highest proportion of visitors (8%) was to improve public transport links throughout the county. This was mainly called for by visitors to Monmouth and Abergavenny. The second suggestion (mentioned by 7%) was to improve parking – either by increasing the number of spaces or by making it cheaper or free. This was mentioned most frequently by visitors to Chepstow and Tintern Abbey. The third suggestion (mentioned by 6%) was for more information to be provided for tourists on the area's history or by having Tourist Information centres.

2. Aims and objectives

Beaufort was commissioned by Visit Wales to conduct the 2019 Wales Visitor Survey, to update findings from the 2016 wave of research and track any changes in the profile, attitudes and satisfaction of visitors to Wales. Three categories of visitors were covered: UK day visitors, UK staying visitors and overseas visitors.

Key objectives for the survey, across its two phases, were to:

- a. Profile visitors to Wales (demographics, age, lifecycle, party size and gender and previous experience of visiting Wales)
- b. Analyse the motivations for choosing Wales, such as perceptions, past experiences, proximity etc.
- c. Find out details about the current trip – e.g. location, activities undertaken, transport used to and within Wales, accommodation stayed in (if applicable)
- d. Investigate attitudes and obtain ratings in respect of the Welsh visitor experience, including systematically for a range of tourism-related facilities and also ‘sense of place’ and related issues
- e. Compare pre-visit expectations and attitudes to the actual experience
- f. Investigate factors such as future intentions to visit and likelihood of recommending
- g. Profile information usage in visit planning.

Local authorities, tourism partnerships and tourism organisations across Wales were offered the opportunity to buy in to the 2019 Visitor Survey by boosting the number of interviews at specific locations, adding new interviewing locations or adding area-specific questions to measure particular local elements of the visitor experience.

This summary report focuses on interviews conducted within Monmouthshire, at the following locations:

- Monmouth town centre
- Abergavenny town centre
- Chepstow town centre
- Tintern Abbey

Details of all core Visit Wales and partner buy-in interviewing locations can be found in Appendix I.

3. Methodology

3.1 Overview of approach

Interviewing for the 2019 Wales Visitor Survey took place in two stages:

1. Stage 1: Face-to-face survey:

Interviews were conducted with adults aged 16+ who were on a non-routine trip to the area (day trip or staying visitor). General demographic information such as age, gender, social class, ethnicity, disability, residence and composition of the visiting party was gathered in a short face-to-face survey, as well as awareness of advertising, marketing and publicity for Wales (pre-visit). **677** interviews were conducted at Stage 1 across **4 locations** within Monmouthshire unitary authority area.

2. Stage 2: Follow-up telephone survey:

A longer, more in-depth interview was conducted by telephone with a sample of visitors interviewed at Stage 1, after their visit ended. This gathered feedback, post-visit, on their experience as a whole, including perceptions of Wales as a tourism destination, likelihood to revisit and whether they would recommend Wales to friends and relatives. A total of **345** telephone interviews were conducted with visitors to Monmouthshire County.

The data was weighted at the analysis stage to reflect the proportion of UK day, UK staying and overseas visitors within the region.

Fieldwork took place between 4 May and 22 November 2019.

3.2 Samples achieved at Stages 1 and 2 in Monmouthshire County

Table 1: Locations	Stage 1 Interviews	Stage 2 Interviews
Monmouth town centre	177	84
Abergavenny town centre	202	106
Chepstow town centre	182	88
Tintern Abbey	116	67
TOTAL	677	345

4. Research findings

4.1 Visitor profile

Just over half of visitors to Monmouthshire are from Wales (55%), which is slightly lower than for Wales as a whole (69%). Following on from this, Monmouthshire as a whole receives considerably more visitors from outside of Wales compared to all sites across Wales (44% cf. 27% all Wales); this is probably due to Monmouthshire's proximity to England. One in twenty visitors to Monmouthshire live overseas which is in line with the all Wales average (5% cf. 4% all Wales).

There are variations however, between the different sites. Abergavenny had a higher proportion of Welsh visitors (81%), while less than half of visitors to Tintern Abbey and Chepstow were from Wales (23% and 38%). These two sites were therefore, more likely to attract visitors from the rest of the UK outside of Wales (62% and 56% from the rest of the UK respectively) and overseas (15% for Tintern Abbey and 6% for Chepstow).

The gender split of visitors to Monmouthshire is skewed towards more female visitors (65% female and 35% male), as is the case across Wales as a whole (61% male and 31% female). This was also the case at the individual sites – but to a lesser extent at Tintern Abbey (41% male and 59% female).

Overall, there are higher proportions of older people aged over 55 visiting Monmouthshire compared to the overall Wales average (46% cf. 37%). The proportion of younger visitors to Monmouthshire is in line with the proportion across Wales as a whole (23% cf. 24%) but the proportion of middle-aged visitors (aged 35-54) is lower in Monmouthshire compared to the rest of Wales (31% cf. 39%). Abergavenny attracts the highest proportion of younger people aged 16-34 (29%), while Tintern Abbey attracts the highest proportion of older visitors aged over 55 (52%).

The socio-economic profile of visitors to Monmouthshire is almost identical to the average profile across Wales as a whole, with 71% of visitors coming from more affluent ABC1 households¹ and just under a third of visitors (29%) from less affluent households, which was also the case across Wales. Tintern Abbey attracts the highest proportion of ABC1 visitors (84%) while Monmouth attracts the highest proportion of C2DE visitors (36%).

¹ Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

AB: Higher and intermediate managerial, administrative and professional occupations

C1: Supervisory, clerical and junior managerial, administrative and professional occupations

C2: Skilled manual workers

DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

The ethnic profile of visitors to Monmouthshire is overall in line with the profile across Wales as a whole as almost nine in ten visitors (87%) described themselves as white Welsh/British (cf. 90% on average across Wales). However, a slightly higher proportion of visitors to Monmouthshire were white other (11% cf. 7%) but only 2% were non-white which was similar to the average across Wales (3%).

There are fewer fluent Welsh speaking visitors in Monmouthshire generally than on average across Wales (3% cf. 9%) reflecting the linguistic profile of the county - see Table 2 below.

Table 2: Demographic profile of visitors	Monmouthshire TOTAL %	ALL WALES %
Area of residence		
Wales	55	69
Rest of the UK	40	27
Overseas	5	4
Gender		
Male	35	39
Female	65	61
Age		
16 - 24 years	9	7
25 – 34 years	14	17
35 – 44 years	14	20
45 – 54 years	17	19
55 - 64 years	20	16
65+ years	26	21
Social grade		
AB	36	35
C1	35	35
C2	18	18
DE	11	11
Welsh speaking		
Fluent	3	9
Non-fluent	5	10
Non-Welsh speaker	92	81
Ethnicity		
White Welsh / British	87	90
White other	11	7
Non-white / other	2	3

Bases = Stage 1 2019: Monmouthshire total (677), all Wales (7,683).

NB percentages may not add to up to 100% due to rounding.

Most visitor groups to the Monmouthshire County area are either visiting as a couple (38%) or visiting alone (21%). These proportions are considerably higher than the all Wales profile, where 27% had been visiting as a couple and only 11% were visiting alone. Conversely the proportion of families with young children visiting Monmouthshire was half that of the all Wales average (14% cf. 28%).

Furthermore, Chepstow was most likely of the four Monmouthshire sites to attract families with young children (18%) but was the least likely to attract families with older children (4%).

Monmouth town centre was considerably more likely to have solo visitors (32%) compared with only 5% in Tintern Abbey.

The average number of people in each visiting party is 3.1 (2.7 adults and 0.4 children), which is lower than the all Wales average of 3.7 (2.8 adults and 0.9 children). This is being driven by the lower number of children visiting Monmouthshire (0.4 cf. 0.9 on average across Wales).

Monmouthshire attracts a lower than average proportion of repeat visits from staying visitors as 7% had visited Monmouthshire more than 10 times in the last three years (cf. 16% across Wales as a whole). In addition, over a third of staying visitors at Monmouthshire only visited once in the last three years compared to three in ten staying visitors across Wales (30%).

In contrast, day visitors are more likely to be frequent repeat visitors to Monmouthshire with four in ten day visitors (40%) saying they had been more than 20 times to the site they were interviewed in during the last year. This was driven by the high proportion of repeat visits at Monmouth and Abergavenny (62% and 53% respectively). In contrast, day visitors to Tintern Abbey and Chepstow were considerably more likely to have only visited once in the last year (25% and 24% cf. 13% on average across Monmouthshire) – see Table 3 overleaf.

Table 3: Group type and frequency of visiting	Monmouthshire TOTAL %	ALL WALES %
Type of visiting party		
Couple	38	27
Visiting alone	21	11
Family with young children	14	28
Friends	10	11
Family with older children	8	8
Family without children	7	8
Organised group / society	2	2
Family with younger and older children	2	4
Other	<1	<1
Refused	-	1
Average size of party		
Average number of adults	2.7	2.8
Average number of children	0.4	0.9
Average total number of people	3.1	3.7
Frequency of visiting in last three years (staying visitors)		
Stage 2 bases in brackets	(Base = 115)	(Base = 1,880)
Once	36	30
2 – 3 times	30	28
4 – 6 times	20	20
7 – 10 times	7	6
More than 10 times	7	16
Don't know	-	<1
Frequency of visiting in last year (day visitors)		
Stage 2 bases in brackets	(Base = 230)	(Base = 2,029)
Once	13	9
2 – 3 times	16	11
4 – 6 times	10	13
7 – 10 times	8	10
11 – 20 times	10	14
More than 20 times	40	42
Don't know	2	1

Bases = Stage 1 2019: Monmouthshire total (677), all Wales (7,683).

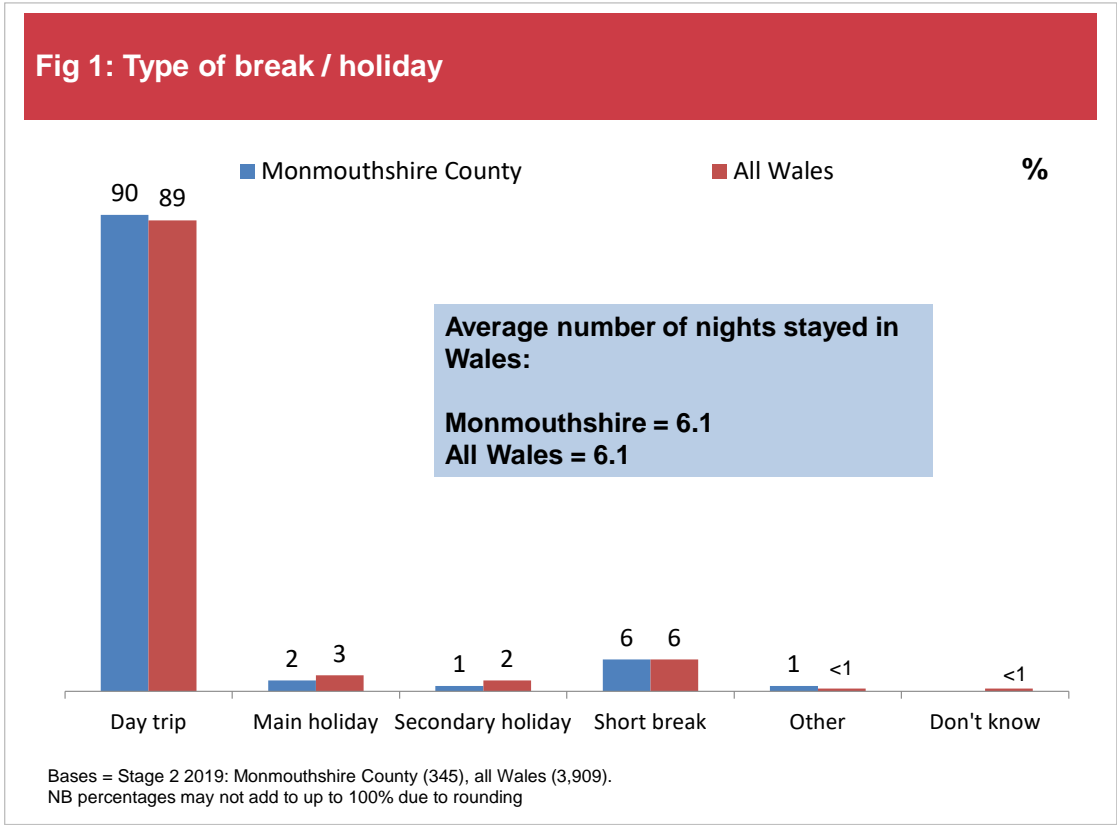
NB percentages may not add to up to 100% due to rounding.

4.2 Trip profile

The vast majority of visitors to Monmouthshire were on a day trip when interviewed (90%); this was in line with the all Wales average of 89%. As might be expected, the majority of day visitors to Monmouthshire lived in Wales (59%), although a sizeable proportion came from the rest of the UK (40%); only 4 day visitors lived abroad.

The remaining 10% of visitors to Monmouthshire were staying in Wales, most commonly on a short break (6%) - short-break visitors tended to live in the rest of the UK. Those visiting Chepstow and Tintern Abbey were slightly more likely to be staying in Wales (12% and 13%) compared to those visiting Monmouth and Abergavenny (10% and 7%).

The average number of nights stayed was equal to the all Wales average (6.1). Staying visitors interviewed at Abergavenny were staying longer in Wales (average 8.1 nights), while those interviewed at Tintern Abbey were staying for the least amount of time (average 4.4 nights) – see Figure 1 below.



4.3 Motivations for visiting and activities undertaken

4.3.1 Reasons for visiting

Visitors to Monmouthshire were most likely to have come to the area to visit historical and religious sites or attractions (41%); this rose to 59% of visitors to Chepstow and 76% of visitors to Tintern Abbey. This was also slightly more likely to be mentioned by visitors to Monmouthshire than visitors to Wales as a whole (36%).

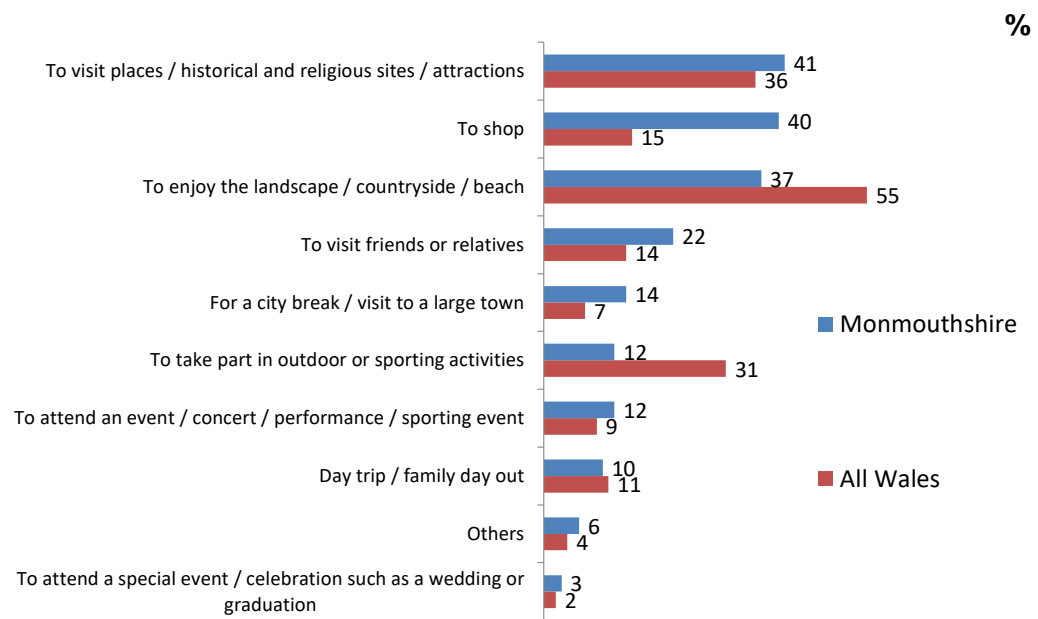
In addition, Monmouthshire County visitors were considerably more likely to say they were visiting to go shopping than visitors across Wales as a whole (40% cf.15%); this is mainly driven by visitors to Abergavenny and Monmouth town centre as 60% and 61% respectively gave this as their reason for visiting (compared to only 14% and 10% of visitors to Chepstow and Tintern Abbey).

Over a third of visitors to Monmouthshire came to the area to enjoy the landscape / countryside (37%). This reason seems slightly less important to Monmouthshire visitors compared to visitors to other parts of Wales as over half said it was their reason for visiting on average (55%). Visitors to Chepstow and Tintern Abbey were more likely to state the landscape and the country side as a reason for visiting. This is because both sites are situated in the Wye Valley which is an area of outstanding natural beauty. Interestingly only 29% of visitors to Monmouth mentioned the landscape and the countryside despite Monmouth's proximity to the Wye Valley.

Following on from this, visitors to Monmouthshire were considerably less likely than visitors across Wales to take part in outdoor or sporting events (12% cf. 31) - see Figure 2 overleaf.

It should be noted, however, that these motivating factors will be determined to a large extent by the nature of the interviewing locations (three town centres and an abbey).

Fig 2: Reasons for visiting



Bases = Stage 2 2019: Monmouthshire County (345), all Wales (3,909).
 NB: percentages do not add up to 100% as more than one response possible.

4.3.2 Main activities undertaken while in Monmouthshire

Looking in more detail at the specific activities undertaken by visitors interviewed in Monmouthshire, the most popular activities was general sightseeing and visiting a castle or other historic attractions (25% for each). The latter is driven primarily by the fact that Tintern Abbey and Chepstow were two of the interviewing locations in Monmouthshire (49% and 44% respectively visited a castle or other historic sight). This is also why a higher proportion than average visited a religious site (15% cf. 6% on average across Wales).

Around one in eight visitors to Monmouthshire visited a museum or heritage centre which was in line with the all Wales average (11%). However, this proportion rose to 24% and 22% at Chepstow and Tintern Abbey respectively.

Visitors to Monmouthshire were considerably less likely to visit a country park or forest park than visitors to Wales as a whole (11% cf. 23%). Visitors to Monmouthshire were also less likely to have been walking for more than 2 miles (10% cf. 19%) or visited the beach than other visitors across Wales (11% cf. 22%); this is due to the fact that other areas of Wales have more beaches than Monmouthshire. However, a higher proportion of visitors to Monmouthshire had been to a food and drinks festival than Wales as a whole (7% cf. 1%). This is because the fieldwork period coincided with Abergavenny's food festival in September (19% of visitors to Abergavenny had been to the food festival and 2% of visitors to Monmouth) – see Table 4 overleaf for more details.

Table 4: Most popular individual activities	Monmouthshire TOTAL %	ALL WALES %
General sightseeing	25	23
Visit a castle or other historic attraction	25	16
Religious site	15	6
Museum or heritage centre	13	11
Visit country parks / forest parks	11	23
Walking more than 2 miles	10	19
Food and drinks festival	7	1
Wildlife watching	6	13
Visit a wildlife attraction / nature reserve	6	11
Visit gardens	6	13
Nature based attraction	5	11
Visit the beach	5	22
Enjoy the views / sightseeing	4	2
Shops / market	4	<1

Bases = Stage 2 2019: Monmouthshire County (345), all Wales (3,909). NB percentages do not add to up to 100% as more than one response possible.

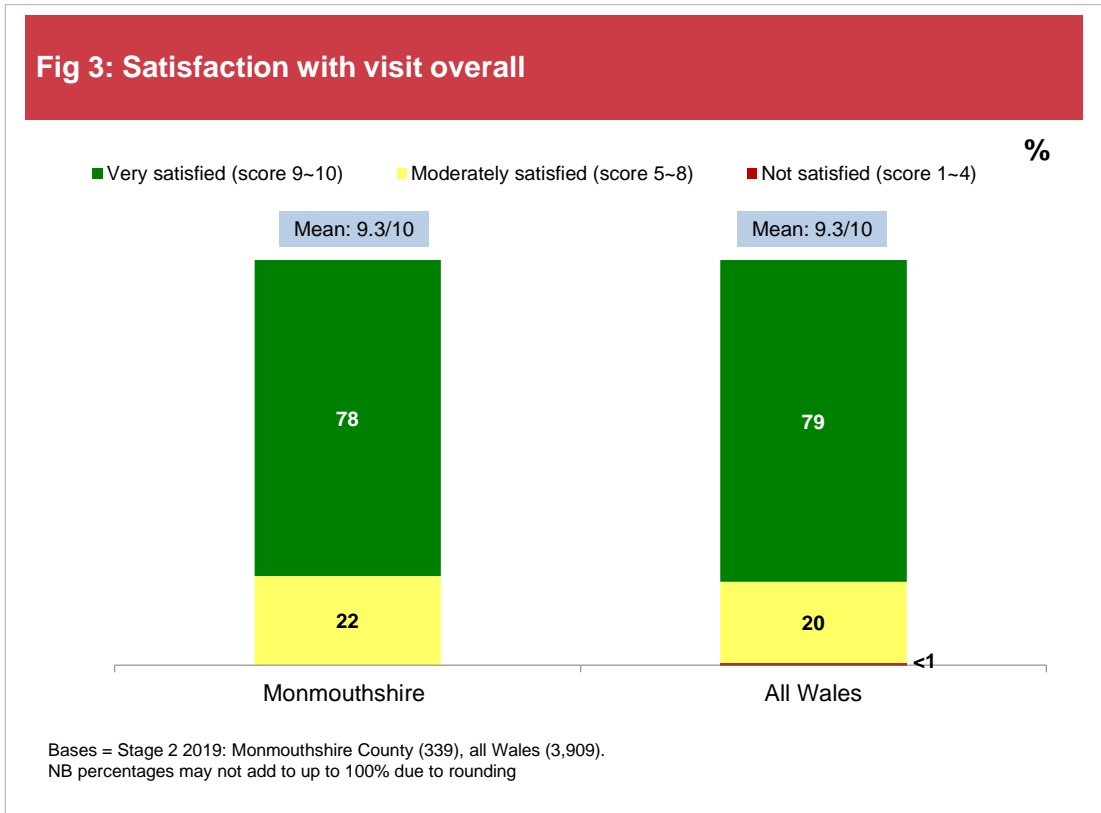
4.4 Satisfaction with overall experience, revisiting and recommending

4.4.1 Satisfaction with Wales as a place to visit

In general, visitors to Monmouthshire were highly satisfied with their visit, as was the case among visitors across all of Wales. On a scale of 1 to 10, where 1 was 'very dissatisfied' and 10 was 'very satisfied', almost eight in ten of visitors to Monmouthshire (78%) gave a score of either 9 or 10 for *Wales overall as a place to visit* – the average score was 9.3/10 (equal to the all Wales mean score).

A further 22% gave more moderate scores of between 5 to 8 / 10, and none were dissatisfied with their visit.

Satisfaction levels were highest at Tintern Abbey, with 87% giving a score of 9 or 10. In contrast, in Monmouth, satisfaction scores were somewhat lower than the all Wales average (68% cf. 79%) although they were still very high – see Figure 3 below.



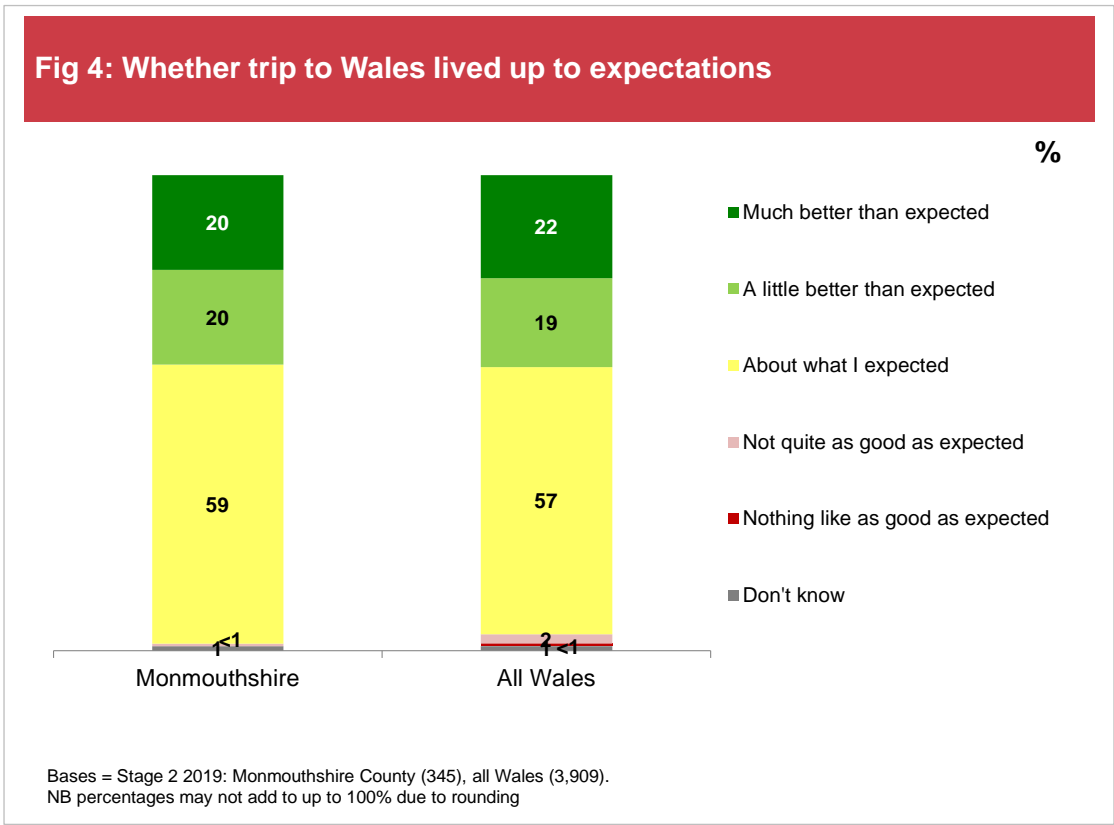
Overseas visitors were slightly more likely to score their visit to / in Wales a 9 or 10/10 which is why scores are slightly higher at Tintern Abbey where there were more visitors from overseas. In addition, new visitors were also more likely to give the highest satisfaction scores.

4.4.2 Expectations

Their trip to / in Wales exceeded expectations for two fifths of visitors to Monmouthshire, with 40% saying that it was better than expected; this rose to 53% amongst visitors to Chepstow and 49% for Tintern Abbey visitors, but was lower for visitors to Monmouth and Abergavenny (23% and 37% respectively).

Almost six in ten felt that their expectations had been met (59%). Less than 1% of visitors to the region said that their trip was not as good as expected.

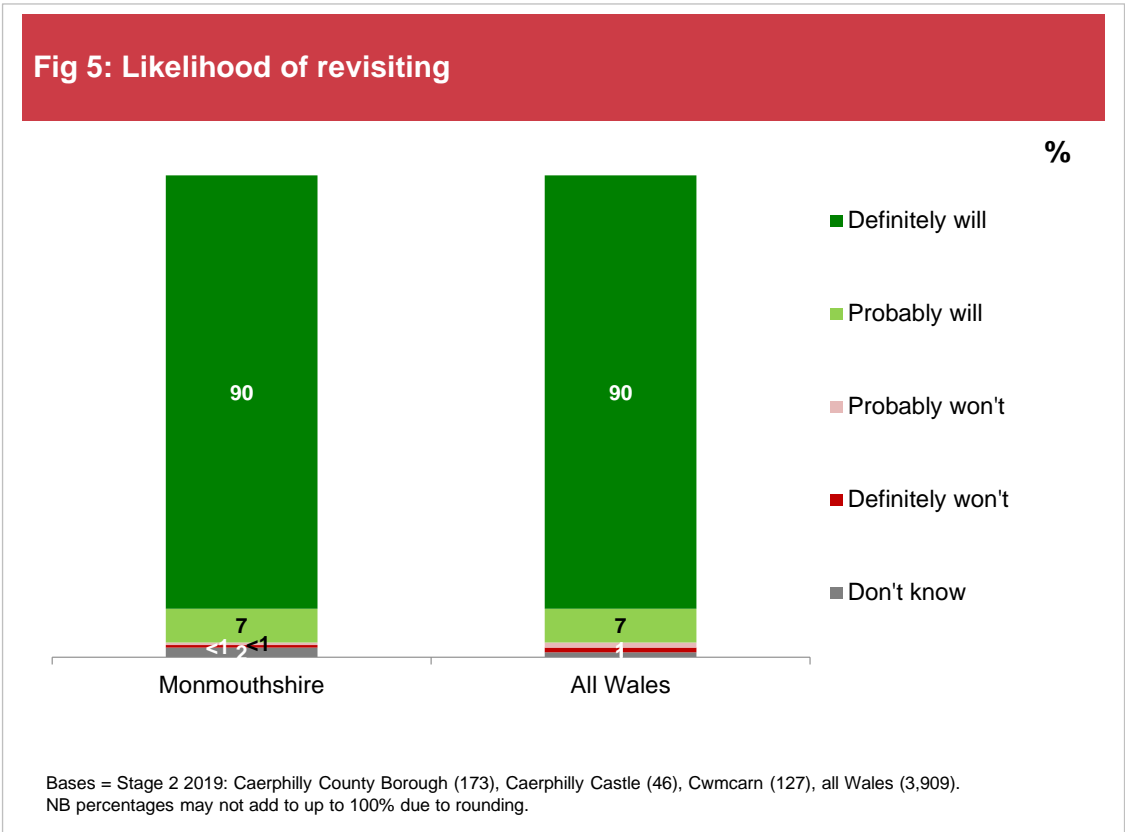
Comparing results for Monmouthshire to Wales as a whole, a similar proportion of visitors felt that their trip was much better than expected (21% cf. 22%). None of the Monmouthshire visitors said their visit was nothing like as good as they expected, whereas 1% of visitors across Wales said this - see Figure 4 below.



4.4.3 Returning to Wales in future

Virtually all visitors to Monmouthshire said they were likely to return in future (97%); 90% said they would definitely visit again (the same as the all Wales average), while 7% would probably visit again (cf. 7% all Wales). Higher proportions said they would definitely return at Abergavenny compared to the other sites (99% cf.87% at Monmouth, 84% at Chepstow and 85% at Tintern Abbey).

Only a very small proportion of visitors (1%) said they were not likely to make another visit to the region – see Figure 5 below.



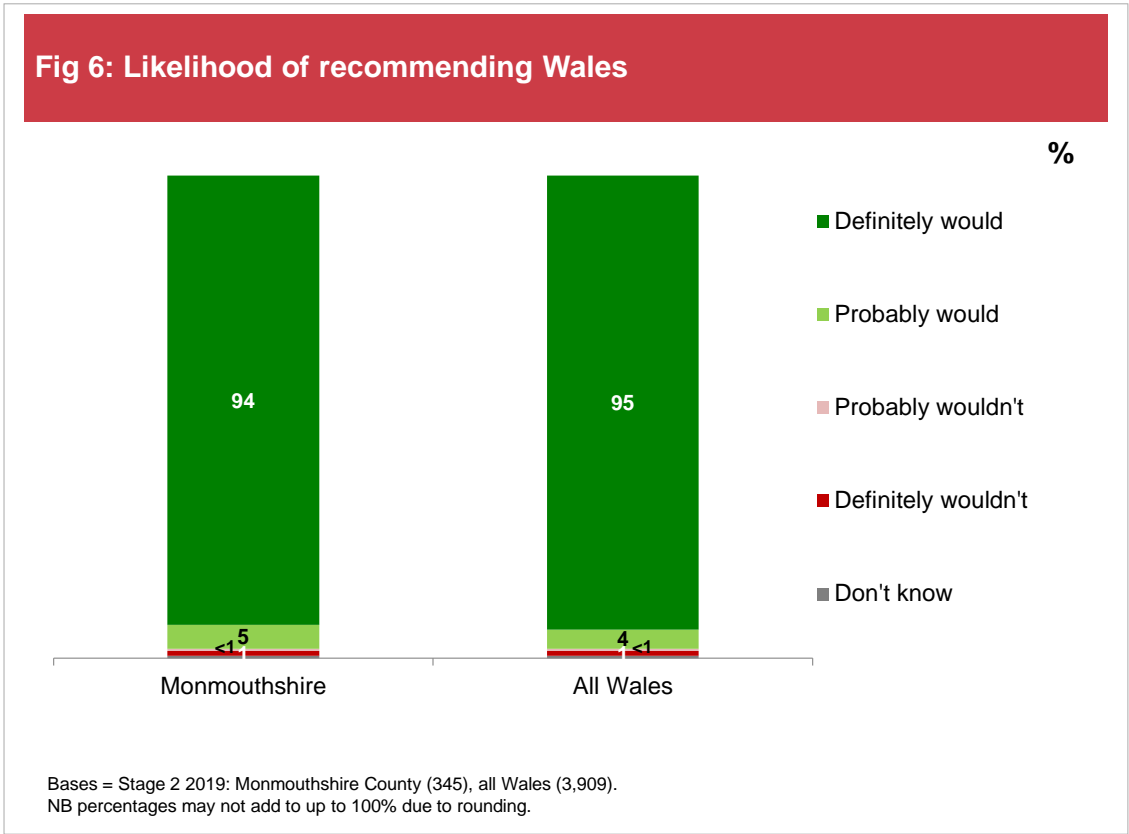
Visitors who lived in Wales and the rest of the UK were very likely to say that they would definitely visit again (94% and 89% respectively), while almost half of overseas visitors said the same (47%).

Similarly, 95% of repeat visitors said they would definitely visit again. However, 64% of new visitors also said that they would definitely return to the area for another visit.

4.4.4 Recommendation

Reflecting the high levels of visitor satisfaction and strong likelihood of returning to Wales in future, almost all visitors to Monmouthshire said that they would recommend it as a place to visit (99%); 94% would definitely recommend, and 5% would probably recommend Wales to friends and family. Less than 2% said that they probably or definitely would not recommend Wales as a place to visit (very small number of visitors to Abergavenny and Tintern Abbey).

The findings for Monmouthshire are in line with proportions seen across the whole of Wales, where 99% would recommend Wales and less than 2% would not – see Figure 6 below.



Visitors to Monmouth were slightly more likely to say they would definitely recommend a visit to others compared to the other sites (96% cf. 94% for Chepstow, 93% for Abergavenny and 90% for Tintern Abbey).

4.5 Attractions visited and Monmouthshire's strengths

4.5.1 Most visited Monmouthshire attraction

Visitors to the four sites in Monmouthshire who were interviewed at Stage 2 were asked a series of questions specifically about Monmouthshire.

Firstly, they were asked which attractions they visited during their last trip to Monmouthshire (they were told that Monmouthshire is the county where they were interviewed). Participants were asked about each attraction in turn. Unsurprisingly, the most visited attraction was Tintern Abbey mentioned by over a third of visitors overall (37%). This is because Tintern Abbey was one of the interviewing locations. Over eight in ten (82%) of those interviewed at Tintern Abbey had visited the Abbey itself. Just under four in ten visitors to Monmouth visited the Abbey (38%), while just over one in five visitors to both Chepstow and Abergavenny said they visited Tintern Abbey during their trip to Monmouthshire.

Over a third of visitors had visited Chepstow Castle (36%) – this rose to 65% of those visiting Chepstow. However, between three in ten and a quarter of the visitors to the other sites had also visited Chepstow Castle.

Just under three in ten visitors had visited the Wye Valley and the Brecon Beacons (29% and 28%), while around one in five visited Abergavenny's Food festival (21% - this rose to 46% of those interviewed at Abergavenny). Under one in five had visited Abergavenny's Castle and museum and Raglan Castle (18% for each), while one in seven visited the Old Station in Tintern and St Mary's Priory Church and Tithe Barn in Abergavenny (14% for each).

Over one in ten visited Caldicot Castle and Chepstow racecourse (11% for both) whilst a further one in ten visited Usk Castle (10%). Other Monmouthshire attractions visited by less than one in ten visitors during their last trip to Monmouthshire are mentioned in the table overleaf.

It is worth noting that a sizable minority of 17% had not visited any of these attractions during their last visit to Monmouthshire. These were most likely to be repeat visitors (19%) and those visitors coming from the rest of the UK (20%). The proportion saying none of these was also considerably higher at Abergavenny and Monmouth (24% and 26% respectively). This is partly due to the fact that visitors to these town centres are more likely to be visiting in order to go shopping or for an event (e.g. food festival).

Table 4: Sites visited during last trip to Monmouthshire (prompted)	Monmouthshire visitors %
Tintern Abbey	37
Chepstow Castle	36
Wye Valley Area of Outstanding Natural Beauty	29
Brecon Beacons National Park	28
Abergavenny Food Festival	21
Abergavenny Castle & Museum	18
Raglan Castle	18
Old Station, Tintern	14
St Mary's Priory Church & Tithe Barn, Abergavenny	14
Caldicot Castle and Country Park	11
Chepstow Racecourse	11
Usk Castle	10
Shire Hall, Monmouth	9
Abergavenny Tourist Information Centre	9
Chepstow Museum	9
Nelson Museum, Monmouth	8
Chepstow Tourist Information Centre	8
Vineyard or cider orchard (includes: Apple County, Ancre Hill, Sugarloaf, Tintern Parva, White Castle)	8
None of these	17

Base = Stage 2 2019: Monmouthshire (345) NB percentages do not add to up to 100% as more than one response possible.

4.5.2 Monmouthshire's strengths

Visitors were then asked to what extent they agreed or disagreed with a series of statements about Monmouthshire.

Visitors were most likely to strongly agree that Monmouthshire is a great place for walking and being out in the countryside (82% strongly agreed and 11% agreed slightly). It is interesting that Monmouthshire is mainly seen as a county for walkers and for being out in the countryside when fewer than average visitors to Monmouthshire said they had visited in order to enjoy the landscape and the countryside (p. 12).

Over three quarters of visitors (78%) also agreed strongly that Monmouthshire was a great place to visit castles and other heritage sites; this is due to the high number of castles and historic sites in the county (see list at p. 21).

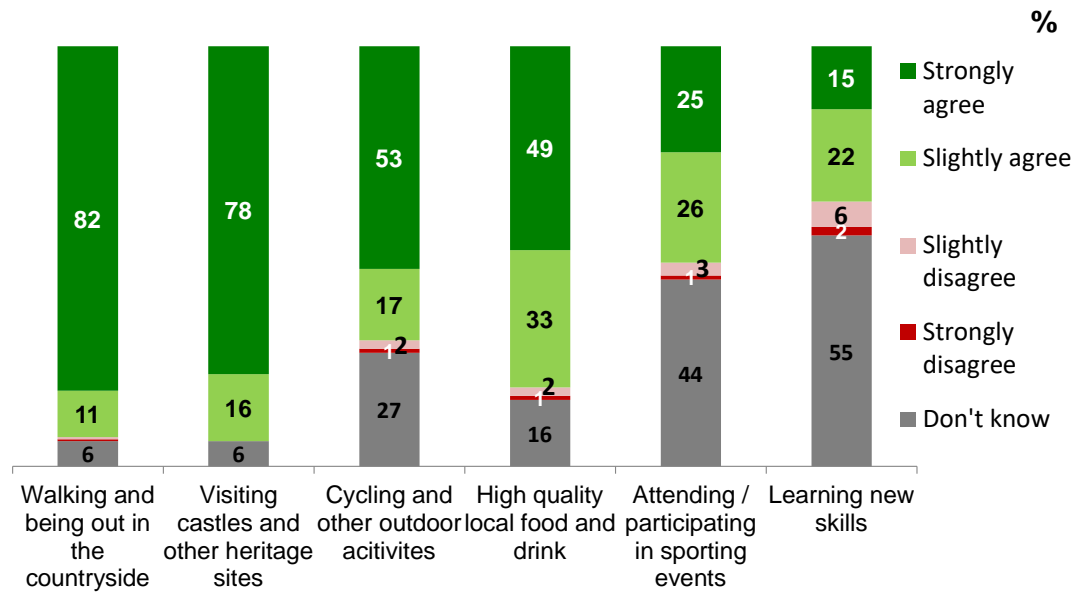
Over half of visitors (53%) agreed strongly that Monmouthshire was a great place for cycling and other outdoor activities. However, over a quarter said they did not know. This is probably due to the fact that few visitors had actually been cycling or had taken part in outdoor activities during their recent visit so they therefore had no experience of it themselves. However, it is worth noting that 3% of visitors disagreed with this statement.

Around half (49%) agreed strongly that Monmouthshire had high quality local food and drink, while a third (33%) agreed slightly with this statement. Again, 3% disagreed with this statement.

For the last two statements the proportion saying they did not know was high – 44% felt they did not know if Monmouthshire was a great place for attending or participating in sporting events while 53% did not know if Monmouthshire was a great place for learning new skills. This suggests that visitors have less experience of these activities whilst in Monmouthshire so they are not necessarily activities that visitors associate with Monmouthshire.

Nevertheless, over half either agreed strongly or slightly that Monmouthshire was a great place for attending / participating in sporting events (25% strongly agree and 26% slightly agree), while over a third agreed that Monmouthshire was a great place to learn new skills (15% strongly agree and 22% slightly agree). Just under one in ten (8%) disagreed with the statement about learning new skills in Monmouthshire – see table overleaf for more detail.

Fig 6: Monmouthshire is a great place for ...



Bases = Stage 2 2019: Monmouthshire County (345).
 NB percentages may not add to up to 100% due to rounding.

4.5.3 Suggested improvements

Finally, visitors were asked what could improve the visitor experience in Monmouthshire. The question was unprompted and visitors could mention as many reasons as they wished. Table 8 below details the comments provided by 1% or more of visitors.

Almost one in five visitors (18%) said nothing could have improved the visitor experience while a further 7% made only positive comments about their experience visiting Monmouthshire.

Over a third of visitors (36%) could not think of specific improvements to make to the visitor experience. Therefore, the individual suggested improvements were made by relatively small proportions.

The suggestion made by the highest proportion of visitors (8%) was to improve public transport links throughout the county. This was mainly called for by visitors to Monmouth and Abergavenny. The second suggestion (mentioned by 7%) was to improve parking – either by increasing the number of spaces or by making it cheaper or free. This was mentioned most frequently by visitors to Chepstow and Tintern Abbey. The third suggestion (mentioned by 6%) was for more information to be provided for tourists on the area's history or by having Tourist Information centres. A further one in twenty (5%) also called for the toilets to be improved – either by having more of them, that they should be cleaner or that they should be free.

Other suggestions mentioned by less than 5% are included in the table overleaf.

Table 5: What could be improved about Monmouthshire's visitor experience (unprompted)	Monmouthshire visitors %
Positive comments	7
Nothing	18
Improve public transport links	8
Improve parking e.g. more spaces, cheaper / free	7
More information for tourists on area's history / Tourist info	6
Toilets – need more, should be free, should be cleaner	5
More information / publicity about what's on offer	4
Wider variety of shops	4
More high quality restaurants / more Welsh food and produce	4
Need more facilities for disabled people / people with mobility issues	3
Better signage / more signposts	2
Traffic	2
Not very welcoming	1
Other	13
Don't know	36


Base = Stage 2 2019: Monmouthshire (345) NB percentages do not add to up to 100% as more than one response possible.

Appendix I: Detailed list of survey locations

Table 6: Individual survey locations by region of Wales		
Region	Attraction	Partner buy-in organisation (if applicable)
North Wales	Anglesey Sea Zoo	
	Beaumaris Town Centre	
	Betws-y-Coed	
	Caernarfon Town Centre	
	Coed y Brenin	Natural Resources Wales
	Colwyn Bay Waterfront	
	Conwy Town Centre	
	Erddig	
	Holyhead Ferry Terminal / Station	Anglesey County Council
	Llanberis	
	Llandudno Promenade	
	Llangollen Town Centre	
	Loggerheads Country Park	
	Newborough	Natural Resources Wales
	Pontcysyllte Aqueduct	
Porthmadog Town Centre		
Rhyl Promenade		
Surf Snowdonia		
Wepre Country Park		
Mid Wales	Zip World (Blaenau Ffestiniog)	
	Aberystwyth Promenade	
	Brecon Town Centre	
	Bwlch Nant Yr Arian	Natural Resources Wales
	Cardigan Town Centre	
	Devil's Bridge	
	Elan Valley Visitor Centre	
	Machynlleth	Powys County Council
	Newquay	
	Newtown	Powys County Council
Powis Castle		
Storey Arms		
Welshpool Town Centre		
Ynyslas	Natural Resources Wales	

Region	Attraction	Partner buy-in organisation (if applicable)
West Wales	Aberdulais Falls Afan Forest Park Fishguard Town Centre Margam Park National Botanic Garden of Wales National Waterfront Museum Newton House, Dinefwr Pembrey Country Park Rhossili, Gower St David's Town Centre Tenby Town Centre	
South Wales	Abergavenny Town Centre Barry Island Seafront Big Pit National Mining Museum Brecon Mountain Railway Bryn Bach Park Caerleon Roman Baths Monmouthshire Castle Cardiff Castle Castell Coch Chepstow Town Centre Cosmeston Country Park Cwmcarn Forest Drive Dare Valley Country Park Garwnant McArthurGlen Monmouth Town Centre National Museum Cardiff Penarth Pier Porthcawl Promenade Rhondda Heritage Park Rock UK Summit Centre Royal Mint Experience St Fagans National History Museum Tintern Abbey Tredegar House Wales Millennium Centre / Bay	Monmouthshire County Council Rhondda Cynon Taf County Council Natural Resources Wales Bridgend Council Monmouthshire County Council Vale of Glamorgan Council

Appendix II: Stage 1 survey questionnaire (face-to-face interviews)

 2 Museum Place, Cardiff CF10 3BG	B01919-1	MONTH OF INTERVIEW	TIME OF INTERVIEW (7)	DAY OF INTERVIEW (8)	WEATHER (9)
	VISIT WALES	April May June July August Sept Oct	10.00am – 12pm 1 12.01pm – 2pm 2 2.01pm – 4pm 3 4.01pm – 6pm 4	Weekday 1 Weekend 2 Bank Holiday 3	Sunshine 1 Cloud 2 Rain 3 Other 4
	VISITOR SURVEY 2019		(CODED VIA SNAP)		
	STAGE 1 (FINAL)	(CODED VIA SNAP)			

APPROACH ADULTS AGED 16+ - READ OUT

Hello, my name is of Beaufort Research, an independent market research company working on behalf of Visit Wales. We are conducting a short, 5 minute survey among visitors here today, which will be followed by a telephone interview in a few weeks. Everything you say will be kept confidential.

Would you be willing to take part in **both stages** of the research?

IF NECESSARY, REASSURE NO SELLING INVOLVED AND INTERVIEWS CARRIED OUT IN ACCORDANCE WITH THE MARKET RESEARCH SOCIETY'S CODE OF CONDUCT

Before we start, please take a look at this card [summary of Privacy Notice] – can I just check that you are willing to participate in this survey?

YES – willing to take part → **CONTINUE**
NO – not willing to take part → **THANK AND CLOSE**

<p>S1 Firstly, do you speak Welsh? IF YES (10) is that?</p> <p>Yes – fluently..... 1 → S2 Yes – but not fluently..... 2 → S2 No..... 3 → S3</p>	<p>Q1 How many nights in total will you be staying in Wales? WRITE IN</p> <p>_____ (14-15)</p>
<p>(IF WELSH SPEAKER)</p> <p>S2 We can conduct this interview in English or Welsh – which would you prefer? (11)</p> <p>English..... 1 Welsh..... 2</p>	<p>(ASK ALL)</p> <p>Q2 And are you visiting today with any pets? (16) CAN MULTI-CODE</p> <p>Yes – dog/s 1 Yes – other pet/s 2 No 3</p>
<p>(ASK ALL) - SHOWCARD A</p> <p>S3 Which of these best describes the reason for your trip here today? (12)</p> <p>Part of a holiday, staying in Wales away from home..... 1 → Q1 Part of a holiday to visit friends or relatives, staying in Wales away from home..... 2 → Q1 Day visit to / in Wales – for a day trip / outing / non-routine visit..... 3 → S4</p> <p>Day visit to / in Wales – for routine business or routine shopping..... 4 THANK AND CLOSE On business..... 5 For study..... 6 Other..... 7</p>	<p>Q3 Which country do you live in? (17-20m)</p> <p>Wales..... 1 Netherlands.. 8 England..... 2 Belgium..... 9 Scotland..... 3 Spain..... A Northern Ireland..... 4 Italy..... B Republic of Ireland... 5 USA..... C France..... 6 Canada..... D Germany..... 7 Australia..... E</p> <p>Europe other (specify) _____</p> <p>Outside Europe other (specify) _____</p> <p>CHECK QUOTAS AND CONTINUE (IF LIVE IN WALES)</p>
<p>(IF DAY VISITOR S3 – CODE 3)</p> <p>S4 Can I just check, will you be spending three hours or more away from home or your accommodation as part of your visit today – including travel? (13)</p> <p>Yes..... 1 → Q2 No..... 2 → CLOSE</p>	<p>Q4 In which local authority area do you live? (21)</p> <p>Anglesey..... 1 Merthyr Tydfil... C Blaenau Gwent... 2 Monmouthshire. D Bridgend..... 3 Neath Port Talbot E Caerphilly..... 4 Newport..... F Cardiff..... 5 Pembrokeshire... G Ceredigion..... 6 Powys..... H Carmarthenshire.. 7 Rhondda Cynon Taf I Conwy..... 8 Swansea..... J Denbighshire..... 9 Torfaen..... K Flintshire..... A Vale of Glamorgan.. L Gwynedd..... B Wrexham..... M</p>

<p>(IF LIVE OUTSIDE OF WALES)</p> <p>Q5 Is this your first visit to Wales? (22)</p> <p>Yes..... 1</p> <p>No..... 2</p> <p>Don't know / can't remember..... 3</p>	<p>Q11 Working status (36)</p> <p>Working full time (30+ hrs per week)..... 1</p> <p>Working part time (> 29 hrs per week).... 2</p> <p>Full time education..... 3</p> <p>Retired..... 4</p> <p>Looking after the home..... 5</p> <p>Full time carer..... 6</p> <p>In training..... 7</p> <p>Other..... 8</p>
<p>(IF LIVE IN WALES)</p> <p>Q6 Is this your first visit to this part of Wales? (23)</p> <p>Yes..... 1</p> <p>No..... 2</p> <p>Don't know / can't remember..... 3</p>	<p>Q12 Status in household (37)</p> <p>READ OUT - The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source.</p> <p>Chief income earner..... 1</p> <p>Other adult (aged 16+)..... 2</p>
<p>(ASK ALL) – SHOWCARD B</p> <p>Q7 Which of the following best describes your party on this visit? (24)</p> <p>SINGLE CODE</p> <p>Visiting alone..... 1</p> <p>A couple..... 2</p> <p>Family – with young children..... 3</p> <p>Family – with older children..... 4</p> <p>Family – with young and older children..... 5</p> <p>Family – without children..... 6</p> <p>Friends..... 7</p> <p>Organised group / society..... 8</p> <p>Other..... 9</p>	<p>Q13 Occupation of Chief Income Earner (last job if retired)</p> <p>Actual job</p> <p>_____</p> <p>Position / grade</p> <p>_____</p>
<p>Q8 How many people are in your visitor party today, including yourself?</p> <p>WRITE IN NO. OF ADULTS & CHILDREN</p> <p>Adults:</p> <p>Children:</p>	<p>Q14 Social grade (38)</p> <p>AB..... 1</p> <p>C1..... 2</p> <p>C2..... 3</p> <p>DE..... 4</p>
<p>Q9 Gender (31)</p> <p>Male..... 1</p> <p>Female..... 2</p> <p>Other 3</p> <p>Prefer not to say..... 4</p>	<p>SHOWCARD C</p> <p>Q15 What is your ethnic group?</p> <p>White Welsh 1</p> <p>White British/English/Scottish/Northern Irish 2</p> <p>White Irish..... 3</p> <p>White Gypsy or Irish Traveller..... 4</p> <p>Other White..... 5</p> <p>White and Black Caribbean..... 6</p> <p>White and Black African..... 7</p> <p>White and Asian..... 8</p> <p>Other Mixed/Multiple ethnic background..... 9</p> <p>Indian..... 10</p> <p>Pakistani..... 11</p> <p>Bangladeshi..... 12</p> <p>Chinese..... 13</p> <p>Japanese..... 14</p> <p>Other Asian background..... 15</p> <p>African..... 16</p> <p>Caribbean..... 17</p> <p>Other Black/African/Caribbean background..... 18</p> <p>Arab..... 19</p> <p>Any other ethnic group..... 20</p>
<p>Q10 Age (32)</p> <p>PLEASE WRITE IN EXACT AGE _____</p> <p>IF REFUSE, PLEASE ASK FOR AGE BAND</p> <p>16-19..... 1 55-64..... 6</p> <p>20-24..... 2 65-74..... 7</p> <p>25-34..... 3 75-84..... 8</p> <p>35-44..... 4 85+..... 9</p> <p>45-54..... 5 Refused..... A</p>	

SHOWCARD D

Q16 Do you or does anyone else in your party have any of the following conditions or impairments? You can tell me the letter next to each one if you prefer.

CAN MULTI-CODE

- A** Mobility impairment (wheelchair user)..... 1
- B** Mobility impairment (non-wheelchair user)..... 2
- C** Blind..... 3
- D** Partially sighted..... 4
- E** Deaf..... 5
- F** Partial hearing loss..... 6
- G** Learning difficulties..... 7
- H** Long-term illness (e.g. AIDS, arthritis, cancer, diabetes)..... 8
- None of these 9

SHOWCARD E

Q17 Have you seen or heard any of these types of advertising, marketing and publicity for Wales before your visit today?

CAN MULTICODE

- TV advertising..... 1
- TV programme..... 2
- Cinema advertising..... 3
- Radio advertising or programme..... 4
- Read an article in a newspaper or magazine (print or online)..... 5
- Saw an advert, flyer or supplement in a newspaper / magazine..... 6
- Outdoor advertisement (e.g. posters, bus sides, airports, stations)..... 7
- Online ad (inc. still or moving ads)..... 8
- Social media (online e.g. Facebook, Twitter etc)... 9
- The official tourist board website www.visitwales.com..... A
- Other website (e.g. TripAdvisor)..... B
- Word of mouth / conversation with others in person..... C
- Direct mail / flyer..... D
- Email newsletter..... E
- Other..... F
- None of these G

Q18 Have you heard of a campaign called The Wales Way?

- Yes 1
- No 2
- Don't know 3

**SHOWCARD F
IF YES TO Q18**

Q19 To what extent did The Wales Way influence your decision to visit Wales? **Scale of 1-10**

- 1 - No influence at all 1
- 2 2
- 3 3
- 4 4
- 5 5
- 6 6
- 7 7
- 8 8
- 9 9
- 10 - Only reason I visited A

READ OUT: We will be calling you in a few weeks to ask you a few more questions about your trip. Can I please take your name and the best telephone number for the follow-up telephone interview? Can I also take a second number, as a back-up?

RECORD CONTACT DETAILS BELOW - READ THESE BACK TO CHECK

REMINDE CONTACT DETAILS WILL ONLY BE USED FOR PURPOSES OF RESEARCH

Name: _____

Preferred telephone number: _____ Back-up telephone number _____

IF USA – RECORD STATE THEY LIVE IN: _____

Appendix III: Stage 2 survey questionnaire (telephone interviews)

B01919-2
2019 Visit Wales Visitor Survey Stage 2
Telephone Survey Questionnaire (FINAL)

CASE NUMBER (FROM STAGE 1)

CONTACT NAME:

TELEPHONE NUMBER:

WELSH SPEAKER:

SITE NAME (FOR QUESTION WORDING):

UK DAY / UK STAYING / OVERSEAS DAY / OVERSEAS STAYING (FOR QUOTA AND ROUTING):

COUNTRY OF RESIDENCE (FOR QUESTION WORDING):

READ OUT: Hello, my name is _____ and I'm calling from Beaufort Research. Thank you for taking part in a short interview for Visit Wales a few weeks ago at [INSERT SITE NAME]. Now that you've returned home we're calling to carry out the follow-up interview about your visit in Wales. This will take around 15 minutes to complete. IF NECESSARY ADD: Everything you tell us will be kept confidential. The survey is being conducted strictly in accordance with the Market Research Society Code of Conduct.

CHECK SPEAKING TO NAMED CONTACT. IF UNABLE TO TAKE PART IMMEDIATELY MAKE APPOINTMENT

S1: IF WELSH SPEAKER FROM SAMPLE: Can I just check, would you like to conduct this interview in English or Welsh?

English

Welsh

READ OUT: You have the option to withdraw from the survey at any point during the interview. You can view full details of our Privacy Notice at [insert link]

S2 Are you happy to continue (now or at another time)?

Yes – IF YES, CONTINUE

No – IF NO, PLEASE THANK THEM FOR THEIR TIME AND END THE INTERVIEW

SECTION 1 – VISITING WALES

ASK IF STAYING VISITOR

Q1 How many times in the last three years have you taken a leisure break or holiday in Wales, including the recent trip when we interviewed you? **READ OUT AS NECESSARY**

Once in three years

2 – 3 times

4 – 6 times

7 – 10 times

More than 10 times

Don't know / can't remember

ASK IF DAY VISITOR

Q2 How many times in the last year have you taken a day trip in/to Wales, including the recent trip when we interviewed you? **READ OUT AS NECESSARY**

- Once in the last year
- 2 – 3 times
- 4 – 6 times
- 7 – 10 times
- 11 – 20 times
- More than 20 times

Don't know / can't remember

ASK IF STAYING VISITOR

Q3 What type of trip was your recent trip in/to Wales? **READ OUT**

- Main holiday of the year
- Secondary / additional holiday
- Short break
- Other

Don't know / can't remember

ASK IF STAYING VISITOR

Q4 Which one of the following statements best applies to your trip?
READ OUT – SINGLE CODE

1. Wales was my main or only holiday destination
2. Another UK country was my main holiday destination
3. Another European country was my main holiday destination
4. I toured around the UK and Europe, visiting several different countries

Don't know / can't remember

ASK IF STAYING VISITOR

Q5 And thinking about your time in Wales, were you based in one location during your recent visit or did you stay overnight in several places or tour around the country? **SINGLE CODE**

- Based in one location
- Stayed overnight in several places / toured around

Don't know / can't remember

SECTION 2 – TRAVELLING IN AND AROUND WALES

ASK IF OVERSEAS VISITOR

Q6 What was your main method of transport to reach Britain? **SINGLE CODE - RECORD DETAILS OF STATION / FERRY PORT / AIRPORT**

- Train – including Channel Tunnel (**specify arrival station**) _____
- Ferry – car passenger (**specify arrival port**) _____
- Ferry – foot passenger (**specify arrival port**) _____
- Plane (**specify arrival airport**) _____
- Other (**please specify how and where arrived**) _____

Don't know / can't remember

ASK IF DAY OR STAYING VISITOR FROM OUTSIDE WALES

Q7 What was your main method of transport to reach Wales?
READ OUT AS NECESSARY - SINGLE CODE - RECORD IN COLUMN A

ASK ALL

Q8 What method/s of transport did you use to get around Wales [IF STAYING VISITOR] / to get to [SITE NAME] on the day we interviewed you [IF DAY VISITOR]?
READ OUT AS NECESSARY - CODE ALL MENTIONED – COLUMN B

	Q7	Q8
	Column A	Column B
	(Single)	(Multi)
Private car or van		
Hired car or van		
Train		
Public bus or coach		
Private bus/coach excursion/tour		
Bike		
Motorbike		
On foot		
Taxi		
Water taxi or bus		
Boat or yacht		
Campervan or tourer		
Ferry – car passenger		
Ferry – foot passenger		
Plane (specify arrival airport)		

Other (please specify how and where arrived)		

Don't know / can't remember		

SECTION 3 – ACTIVITIES UNDERTAKEN & MOTIVATIONS FOR VISITING

ASK ALL

Q9 Which of the following were your reasons for visiting Wales / visiting the part of Wales where we interviewed you a few weeks ago? **READ OUT – CODE ALL MENTIONED**

IF MORE THAN ONE CODED AT Q9 ASK Q10

Q10 And which one was your main reason for visiting Wales / visiting the part of Wales where we interviewed you? **READ OUT – SINGLE CODE**

- To take part in outdoor or sporting activities (e.g. walking, cycling, fishing etc.) → **Q11**
- To attend an event / concert / performance / sporting event → **Q12**
- To enjoy the landscape / countryside / beach → **Q13a**
- To visit places / historical sites / religious sites / specific attractions / go sightseeing → **Q14**
- For a city break / visit to a large town → **Q14**
- To shop
- To visit friends or relatives
- To attend a special event / celebration such as a wedding or graduation
- To visit a spa or have a beauty or health treatment
- For genealogy / to trace my ancestry

Other (**please specify**)

Don't know / can't remember

ASK IF CODE 1 AT Q9

Q11 Which of the following did you take part in during your trip? **PROBE** Any other outdoor or sporting activities or events? **READ OUT – CODE ALL MENTIONED**

Walking (less than 2 miles)
Walking (more than 2 miles)
Cycling
Mountain biking
Fishing - sea
Fishing - course / game
Golf
Horse riding / pony trekking
Adventure sports, e.g. canoeing, rafting, climbing or mountaineering
Water sports
Canal / boating trip
Swimming (indoor or outdoor)
Field sports e.g. hunting / shooting
A sporting event or race, e.g. half-marathon, cycling event, triathlon
Other (**please specify**)
Don't know / can't remember

ASK IF CODE 2 AT Q9

Q12 Which of the following did you attend during your trip? **PROBE** Any other events, concerts or sporting events? **READ OUT – CODE ALL MENTIONED**

Sporting event
Live concert
Theatre or cinema performance
Arts / cultural festival / Eisteddfod
Music festival
Food / drinks festival
Activity event e.g. walking festival, cycle race, charity run
Other (**please specify**)

Don't know / can't remember

ASK IF CODE 3 AT Q9

Q13a Which of the following did you do during your trip? **PROBE** Any other ways of enjoying the landscape / countryside / beaches? **READ OUT – CODE ALL MENTIONED**

Visit the beach - **ASK Q13b**
Visit country parks / forest parks
Visit a wildlife attraction / nature reserve
Visit gardens
Guided walk
Wildlife watching
Other (**please specify**)
Don't know / can't remember

ASK IF VISITED A BEACH AT Q13a

Q13b Certain beaches in Wales have received awards for quality and cleanliness, such as the Blue Flag Award, Green Coast Award and Seaside Award. How important are these awards to you when choosing a beach to visit? **READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS**

Very important
Fairly important
Not very important
Not at all important
Don't know

ASK IF CODE 4 OR 5 AT Q9

Q14 Which of the following did you visit during your trip? **PROBE** Any other places, historical sites, religious sites or attractions? **READ OUT – CODE ALL MENTIONED**

- Museum or heritage centre
- Art gallery or exhibition
- Castle or other historic attraction
- Religious site (e.g. church, cathedral, monastery)
- Industrial heritage attraction (e.g. mill, factory)
- Animal-based attraction (e.g. farm, zoo)
- Nature-based attraction (e.g. gardens)
- Science / technology centre
- Scenic / steam / historic railway
- Theme / amusement park

GO TO Q15

-
- A location associated with a TV series, film or literature
 - General sightseeing
 - Other (**please specify**)
 - Don't know / can't remember

GO TO Q16

ASK IF CODE 1-10 AT Q14

Q15 Thinking about the attractions you visited during your trip in Wales, how satisfied were you with the following aspects? Please use a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied. **READ OUT – RANDOMISE ORDER OF STATEMENTS**

- Your overall enjoyment
- The service you received at them
- Value for money
- Standard of facilities
- Range of attractions

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

ASK ALL

Q16 Thinking broadly about your decision to choose Wales for this [day visit / holiday or short break], which of these other factors **attracted** you to come to Wales or this part of Wales?
READ OUT – RANDOMISE ORDER. CAN MULTICODE

To help you relax and escape from the stresses of life
It is easy to get to
Holidays before and wanted to return
Have always wanted to visit
To visit a particular attraction / place
My Welsh ancestry

Other (**please specify**)

None of these

Don't know

ASK IF STAYING VISITOR

Q17 Which of the following **persuaded** you to spend your holiday/short break in Wales on this occasion? **READ OUT – RANDOMISE ORDER. CAN MULTICODE**

Recommended by friends / relatives / colleagues
Wanted to holiday at home rather than abroad
Found a good deal / special offer
Traveller review websites
Price of hotels / accommodation
Saw something on social media about Wales
Price of airline tickets
Direct advice from travel agent / tour operator
Good exchange rates

Other (**please specify**)

None of these

Don't know

SECTION 4 – EATING OUT

ASK ALL

Q18 Did you eat out during your trip to/in Wales?

Yes → **Q19**

No → **GO TO SECTION 5**

Don't know / can't remember → **GO TO SECTION 5**

ASK IF YES AT Q18

Q19 How satisfied were you with your experience of eating out in Wales on a scale of 1 to 10 on the following dimensions, where 1 = very dissatisfied and 10 = very satisfied? **READ OUT EACH DIMENSION – RANDOMISE ORDER**

- Quality of food
- Service
- Value for money
- Use of local or Welsh food on the menu
- Range of places to eat

READ OUT

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

SECTION 5 – ACCOMMODATION

ASK IF STAYING VISITORS

Q20 During your stay in Wales, what type of accommodation did you mainly use?
READ OUT AS NECESSARY - SINGLE CODE

Hotel

B&B or Guesthouse

Farmhouse

Caravan (touring / campervan / motorhome)

In rented static caravan

In own static caravan

Camping

Self-Catering in rented house, villa, cottage, apartment or flat

Serviced apartment

Friend's / relative's home

Someone else's home on a commercial basis

Own second home / time share

Holiday camp/village

Hostel

Alternative accommodation, e.g. Yurt, Tee-Pee, Tree House, Hut, Ecopod etc.

Boat

Cruise ship

University accommodation

Other (**please specify**)

Don't know / can't remember

ASK IF STAYING VISITOR

Q21 In which Local Authority did you mainly stay in Wales? *INSTRUCTION: If local authority is not known, please write in the name of the town or village*

SINGLE CODE

- | | |
|--------------------|------------------------|
| 1. Anglesey | 14. Neath Port Talbot |
| 2. Blaenau Gwent | 15. Newport |
| 3. Bridgend | 16. Pembrokeshire |
| 4. Caerphilly | 17. Powys |
| 5. Cardiff | 18. Rhondda Cynon Taff |
| 6. Ceredigion | 19. Swansea |
| 7. Carmarthenshire | 20. Torfaen |
| 8. Conwy | 21. Vale of Glamorgan |
| 9. Denbighshire | 22. Wrexham |
| 10. Flintshire | 23. Various |
| 11. Gwynedd | |
| 12. Merthyr Tydfil | |
| 13. Monmouthshire | |

Don't know → **SPECIFY NAME OF TOWN / VILLAGE**

ASK IF STAYING VISITOR AND STAYED IN COMMERCIAL ACCOMMODATION

Q22 Thinking about the accommodation you stayed in during your trip to Wales, how satisfied were you with each of the following? Please use a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied. **READ OUT EACH DIMENSION – RANDOMISE ORDER**

- Quality
- Service
- Value for money
- Overall satisfaction

READ OUT

- 1 – Very dissatisfied
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 – Very satisfied

Don't know / can't remember

Not applicable

ASK IF STAYING VISITOR AND STAYED IN COMMERCIAL ACCOMMODATION

Q23 How did you book your accommodation or package?

DO NOT PROMPT – SINGLE CODE

Directly with the provider (phone / email / the provider's website)

Through a third party online accommodation site (e.g. booking.com, expedia, laterooms.com)

Through a deals site (e.g. Groupon, kgb, etc.)

Through a link on the VisitWales.com website

Through a travel agent or tour operator

Through a tourist information centre

Through Airbnb

Just turned up → **SKIP Q24**

Other (please specify) → **SKIP Q24**

Don't know / can't remember → **SKIP Q24**

ASK IF STAYING VISITOR AND BOOKED IN ADVANCE

Q24 And did you.....? **READ OUT – SINGLE CODE**

- Book accommodation and travel together via the same provider as part of a package
- Book accommodation and travel separately with different providers
- Book accommodation only – no travel booked

Don't know / can't remember

ASK IF STAYING VISITOR AND STAYING IN COMMERCIAL ACCOMMODATION

Q25 How important were the following to you when booking your accommodation in Wales during this holiday / trip? **READ OUT – RANDOMISE ORDER**

- a) The official grading or star rating of the accommodation (that is, through an organisation such as Visit Wales or the AA)
- b) The scores given by other travellers through websites such as TripAdvisor, Booking.com etc.

	Q25a)	Q25b)
	Official grading or star rating	Scores given by other travellers
Very important		
Quite important		
Not very important		
Not at all important		
Don't know		

SECTION 6 – SOURCES OF INFORMATION AND MARKETING

ASK ALL

Q26 In planning and gathering information for your recent trip in/to Wales, did you use online information sources, offline, or both? By offline, we mean sources of information not found on the internet. **READ OUT – SINGLE CODE**

- Online sources only (e.g. websites, apps)
- Offline sources only (e.g. brochures, leaflets)
- Both online and offline sources
- Didn't use any information to plan

Don't know / can't remember

ASK IF USED ONLINE SOURCES (1 OR 3 AT Q26)

Q27 Did you use..? **READ OUT – CODE ALL MENTIONED**

- Websites
- Apps
- Email
- Social media
- Other **(please specify)**

Don't know / can't remember

ASK IF WEBSITE CODED AT Q27

Q28 Can you remember which types of website you or your party used to plan your trip before you went? **DO NOT PROMPT – CODE ALL MENTIONED**

Search engines, e.g. Google - can't remember which sites I ended up on though
Tourism business website e.g. accommodation provider, attraction
Visit Wales / national tourist board
Regional or local authority
Review site, e.g. Trip Advisor, Google Places
Accommodation booking site, e.g. laterooms.com, booking.com, expedia, hotels.com
Deals site, e.g. Groupon, moneysavingexpert.com
Days out site, e.g. dayoutwiththekids.co.uk, daysout.co.uk
Navigation site, e.g. Google maps, AA route planner
Facebook / blog / social media in general
Restaurant guide site
Online newspapers
Other (**please specify**)

Don't know / can't remember

ASK IF USED OFFLINE SOURCES (CODES 2 OR 3 AT Q26)

Q29 What offline sources of information did you or your party use before you went? **DO NOT PROMPT – CODE ALL MENTIONED**

Spoke to friends / relatives / colleagues
Brochure from Visit Wales / national tourist board
Brochure from local authority
Leaflets
Newspaper or magazine
Guidebook
Travel programme
Advert on TV, radio or cinema
Spoke to a travel agent
Spoke to an accommodation provider
Tourist Information Centre - by phone or email
Other (**please specify**)

Don't know / can't remember

ASK ALL

Q30 Thinking now about information sources used during your trip in/to Wales, which one of the following best describes what you or your party used? **READ OUT - SINGLE CODE**

Online sources only (e.g. websites, apps)
Offline sources only (e.g. brochures, leaflets)
Both online and offline sources
Didn't use any information during our trip

Don't know / can't remember

ASK IF CODED 1 OR 3 AT Q30

Q31 Can you remember which types of website or app you or your party used during your trip?
DO NOT PROMPT – CODE ALL MENTIONED

Search engines - can't remember which sites I ended up on though
Tourism business website e.g. accommodation provider, attraction
Visit Wales / national tourist board
Regional or local authority
Review site, e.g. Trip Advisor, Google Places
Accommodation booking site, e.g. laterooms.com, booking.com, expedia, hotels.com
Deals site, e.g. Groupon, moneysavingexpert.com
Days out site, e.g. dayoutwiththekids.co.uk, daysout.co.uk
Navigation site, e.g. Google maps, AA route planner
Facebook / blog / social media in general
Restaurant guide site
Online newspapers
Other (**please specify**)

Don't know / can't remember

ASK IF CODED 2 OR 3 AT Q30

Q32 What offline sources of information did you or your party use during your trip?
DO NOT PROMPT – CODE ALL MENTIONED

Spoke to hosts (friends / relatives)
Advice from accommodation provider
Tourist Information Centre
Brochure from Visit Wales / national tourist board
Brochure from local tourist board
Leaflets
Local newspaper or magazine
Guidebook
Other (**please specify**)

Don't know / can't remember

ASK ALL

Q33 Have you seen or heard any advertising, marketing or publicity for 'Year of Discovery 2019'? **SINGLE CODE**

Yes
No

Don't know / can't remember

IF YES AT Q33

Q34 To what extent did the 'Year of Discovery 2019' influence your decision to visit Wales?
Please give me a number between 1 and 10 where 1 = 'It had no influence at all' and 10 = 'It was the only reason I visited Wales'. **SINGLE CODE**

1 - No influence at all
2
3
4
5
6
7
8

9

10 – Only reason I visited

Don't know / can't remember

SECTION 7 – SUSTAINABILITY, SENSE OF PLACE AND OTHER ISSUES

ASK ALL

Q35 To what extent do you agree or disagree with the statement “Wales represents a sustainable tourism destination for holidays and breaks”?

READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

Strongly agree
Slightly agree
Slightly disagree
Strongly disagree

Don't know

ASK ALL

Q36 Thinking about your recent visit in/to Wales, did any of the following include aspects or features that were distinctively Welsh, or had a particular local character?

READ OUT – CODE ALL MENTIONED – RANDOMISE LIST

Any accommodation you used
Food and drink
Events
Visitor attractions
Heritage sites
Outdoor activities

Any others **(please specify)**

None of these
Don't know / can't remember

ASK ALL

Q37 And how important, or not, is it to you that..? **READ OUT IN TURN – RANDOMISE ORDER**

- i) Your trip to/in Wales gives you an experience that is distinct to Wales and that you couldn't have anywhere else?
- ii) You can see or hear the Welsh language during your visit

INVERT SCALE BETWEEN RESPONDENTS

Very important
Quite important
Not very important
Not at all important

Don't know

SECTION 8 – SATISFACTION / OVERALL EXPERIENCE

ASK ALL

Q38 How satisfied were you with the following aspects of your trip to/in Wales on a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied? *Instruction: code 'not applicable' if any don't apply.* **READ OUT – RANDOMISE ORDER**

- | | |
|---|--|
| 1. Overall value for money | disability / long-term illness |
| 2. Places to visit in Wales | 13. How pet-friendly you found it to be |
| 3. Quality of the natural environment | 14. Quality and availability of public transport |
| 4. Shopping | 15. Digital connectivity, e.g. mobile phone signal, availability of wifi |
| 5. Feeling of welcome | 16. Helping you relax and escape from the stresses of life |
| 6. Cleanliness of streets | 17. Wales overall as a place to visit → |
| 7. Feeling of security | ALWAYS COMES AT THE END OF THE LIST |
| 8. Cleanliness and availability of public toilets | |
| 9. Standard of tourist signposting | |
| 10. Cleanliness of beaches | |
| 11. Sea water quality | |
| 12. Accessibility for people with a | |

SINGLE CODE

- | | |
|-----------------------|---------------------|
| 1 – Very dissatisfied | 7 |
| 2 | 8 |
| 3 | 9 |
| 4 | 10 – Very satisfied |
| 5 | |
| 6 | Not applicable |
| | Don't know |

ASK IF CODED 1-7 FOR STATEMENT 17 – ‘WALES OVERALL AS A PLACE TO VISIT’

Q39 Why did you give a score of [SCORE GIVEN] when asked about your overall experience during your recent trip? What would have improved your experience or encouraged you to give Wales a higher score apart from the weather? **PROBE** – Anything else?
RECORD VERBATIM

- Nothing
- Don't know

ASK ALL

Q40 Overall, would you say your trip to/in Wales was....?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

- Much better than expected
- A little better than expected
- About what I expected
- Not quite as good as expected
- Nothing like as good as expected

- Don't know

ASK ALL

Q41 How likely are you to make another visit in / to Wales in the next few years?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

Definitely will
Probably will
Probably won't
Definitely won't

Don't know

ASK IF STAYING VISITOR

Q42 How likely are you to come to Wales for a day trip in the next few years?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

Definitely will
Probably will
Probably won't
Definitely won't

Don't know

ASK IF DAY VISITOR

Q43 How likely are you to come to Wales for a leisure break or holiday in the next few years?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

Definitely will
Probably will
Probably won't
Definitely won't

Don't know

ASK ALL

Q44 Would you recommend Wales as a place to visit to a friend or relative?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

Definitely would
Probably would
Probably wouldn't
Definitely wouldn't

Don't know

ASK IF OVERSEAS VISITOR

Q45 I'm now going to read out some paired statements. Please tell me which of the two statements in each pair best describes you. Don't think too long about each – just answer as quickly as you can. **READ OUT – ORDER OF STATEMENTS TO BE RANDOMISED (AND ORDER WITHIN PAIRS)**

i)	I care about the image I portray to others	I am comfortable with who I am – I don't care about how others see me
ii)	I always seek out new experiences	I know the type of things I like, and tend to stick with that
iii)	I am more of a city person	I enjoy spending time in the outdoors and in natural landscapes
iv)	When I travel abroad, I like to get off the beaten track	When I travel abroad, I want to see the world's most famous sites
v)	I prefer holidays full of action and adventure	I prefer holidays at a slower and more relaxed pace
vi)	When I travel, I enjoy exclusive or luxury experiences that others might find unaffordable	When I travel, I like to be comfortable but I don't seek out luxury

ANY PARTNER-SPECIFIC QUESTION TO BE ADDED HERE

ASK ALL

Q46 Do you have any other comments you would like to make about your trip to/in Wales?
RECORD VERBATIM

No other comments

ASK ALL

Q47 Finally, would you be willing to be re-contacted by Beaufort to take part in a further stage of research for Visit Wales about your trip to Wales?

All information provided will be completely confidential, and by saying yes now, you will not be committing yourself to a further interview if we contact you again.

Yes - willing to be re-contacted - **RECORD NAME AND TELEPHONE NUMBER**

No

Thanks very much for your time.

Just to confirm that my name is xxx calling from Beaufort Research and that this survey has been conducted according to the Market Research Society Code of Conduct.

If you'd like to check our credentials, you can telephone the MRS via the freephone number 0500 39 69 99.

To confirm, the Privacy Notice can be found at [insert link]

Thanks again and goodbye.

enquiries@beaufortresearch.co.uk
www.beaufortresearch.co.uk