

Research Report

Wales Visitor Survey 2016

Wye Valley Area of
Outstanding Natural Beauty
(AONB)



Prepared for:
Wye Valley AONB

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1. Executive summary

1.1 Introduction

This report focuses on **visitors to sites in the Wye Valley**; **547** interviews were conducted at Stage 1 and a further **263** were conducted at Stage 2 with visitors to 3 locations of interest to the Wye Valley AONB: Chepstow town centre, Monmouth town centre and Tintern Abbey. The specific questions about visitors' expenditure during their visit, which were included in the survey by Monmouthshire County Council, were only asked of those who were interviewed at Chepstow town centre and Monmouth town centre.

This formed part of the 2016 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). **6,652** face-to-face interviews were conducted at Stage 1, and **3,464** 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 11 June and 3 November 2016.

1.2 Key findings

Visitor profile:

Over half of visitors to the Wye Valley sites came from England, Scotland and Northern Ireland (56%), while just over a third of the visitors who came from parts of Wales (36%). Conversely, the majority of visitors to sites across Wales were from Wales but the Wye Valley's proximity to England would explain the higher proportion of English visitors. Only 8% of visitors to the Wye Valley sites were from overseas; however, this is double the average across the whole of Wales (only 4% of visitors are from overseas).

Couples and families with young children are the most common types of visitor groups to the area; the former account for a higher proportion of visitors in the Wye Valley than is the case across Wales, whilst the reverse is true for the latter. The average number of people in each visiting party was 3.2 (2.5 adults and 0.7 children), all of which are slightly lower than the All Wales average of 3.7 (2.7 adults and 1.0 children).

Over four in ten staying visitors to the Wye Valley sites were either first time visitors to Wales or new to this part of Wales (42%), which was higher than the

rest of Wales (at 36%). The average number of visits to Wales / this part of Wales was 3.6 in the last 3 years (which is lower than the all Wales average at 4.2).

Trip profile:

Visitors to the Wye Valley sites are more likely to be on a day trip than visitors to Wales as a whole (at 94% compared to 88% across Wales). The proportion of staying visitors to the area is half that of Wales overall (6% compared to 12% overall). Staying visitors stayed an average of 6.9 nights in Wales.

Motivations for visiting and activities undertaken:

Visitors to the Wye Valley were most likely to have come to the area to visit places, historical / religious sites and attractions (68%), higher than was the case among visitors to Wales as a whole (51%). This is probably higher among visitors to the three sites in the Wye Valley because of the interviewing locations selected, for example Tintern Abbey and Chepstow. They were also slightly more likely to mention visiting friends or relatives (at 18% compared with 16% overall), to go shopping (at 15% compared with 12% overall) or to visit a large town (at 12% compared with 8% overall). Again this is because two out of the three of the interviewing locations in the Wye Valley were town centres. Conversely, despite the fact the region is an area of outstanding natural beauty, visitors to the Wye Valley sites were less likely to say they had come to enjoy the landscape / countryside / beach than was the case for Wales overall (43% of Wye Valley visitors compared with 56% overall) or to take part in outdoor or sporting activities (mentioned by 14% of Wye Valley visitors compared with 25% overall)

The most popular activities undertaken by visitors to the sites in the Wye Valley were visiting a castle or historic attraction (54%), general sightseeing (36%), visiting a museum or heritage centre and visiting a religious site (22% for each). Mentions of visiting castles / historic attractions and museums / heritage centres were higher than for Wales as a whole again because of Tintern Abbey and Chepstow Castle.

Satisfaction with the overall experience, revisiting and recommending:

In general, visitors to the Wye Valley sites were highly satisfied with their visit, as over eight out of ten visitors to the three Wye Valley sites (83%) gave a score of either 9 or 10 for *Wales overall as a place to visit* – the average score was 9.3/10 (cf. 9.2/10 All Wales mean score).

Wales exceeded expectations for almost half of visitors to the Wye Valley, with 47% saying that their trip was better than expected (rising to 54% amongst visitors to Tintern Abbey). Around half felt that their expectations had been met (51%), while only 1% of visitors to the region said that their trip was not quite as good as expected.

Virtually all visitors to the Wye Valley said they were likely to return in future (94%); 82% said they would definitely visit again, while 12% would probably visit again. Only a very small proportion of visitors (6%) said they were not likely to make another visit to Wales.

Reflecting the high levels of visitor satisfaction and strong likelihood of returning to Wales in future, virtually all visitors to sites in the Wye Valley said that they would recommend Wales as a place to visit (96%).

Visitor expenditure at the Wye Valley sites:

Visitors to the two town centres were asked how much approximately they had spent during their visit to the Wye Valley.

As can be expected, staying visitors to the town centres spent most money on their accommodation (average of £436.28), although almost a quarter of staying visitors said they were not spending anything on accommodation, thereby suggesting that they were staying with friends or relatives.

The second highest average spend was on Food and Leisure (£58.06), while the third was on activities and attractions (£56.87).

Visitors spent least on travel in and around the Wye Valley region, where the average spend was £19.78. This is because the majority of visitors to the Wye Valley sites travelled by private car so some of these visitors might not have necessarily factored in costs such as fuel or car running costs.

2. Aims and objectives

2.1 Aims and objectives

Beaufort was commissioned by Visit Wales to conduct the 2016 Wales Visitor Survey, to update findings from the 2013 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 2016 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 the **Wye Valley AONB**, at the following locations:

- Chepstow Town Centre
- Monmouth 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 2016 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). **547** interviews were conducted at Stage 1 across **3 locations** in the **Wye Valley AONB**.

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 **263** telephone interviews were conducted with visitors to the Wye Valley sites. The specific questions about visitors' expenditure during their visit, which were included in the survey by Monmouthshire County Council, were only asked of those who were interviewed at Chepstow town centre and Monmouth town centre.

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 11 June and 3 November 2016.

3.2 Samples achieved at Stages 1 and 2 for the Wye Valley AONB sites

Table 2: Locations	Stage 1 Interviews	Stage 2 Interviews
Chepstow Town Centre	169	84
Monmouth Town Centre	139	64
Tintern Abbey	239	115
TOTAL	547	263

4. Research findings

4.1 Visitor profile

Over half of visitors to the Wye Valley sites came from England, Scotland and Northern Ireland (56%), while just over a third of the visitors who came from parts of Wales (36%). Conversely, the majority of visitors to sites across Wales were from Wales but the Wye Valley's proximity to England would explain the higher proportion of English visitors. Monmouth town centre had a higher proportion of Welsh visitors (49% compared to 36% overall), while the majority of visitors to Tintern Abbey and Chepstow were from England (63% and 52% respectively). Only 8% of visitors to the Wye Valley sites were from overseas; however, this is double the average across the whole of Wales (only 4% of visitors are from overseas).

The split in the gender of visitors to the Wye Valley sites is more even than the All Wales average, which is skewed more towards female visitors.

The age profile of visitors to Wye Valley was slightly older than the All Wales average, as almost half of all the visitors to the sites in the Wye Valley were 55 or older (48%) compared to 38% on average across Wales. Over a fifth (22%) of visitors to Wales were aged 16 - 34, while the proportion of younger visitors to Wye Valley was slightly lower (18% aged 16-34). Chepstow town centre was the site that attracted younger visitors the most (23% aged 16-34 compared to 17% overall) and Monmouth town centre had the fewest visitors aged under 34 (10%).

Of note is the high prevalence of ABC1¹ visitors: these make up nearly three quarters of the visitors to the Wye Valley (74%), while C2DE visitors account for just over a quarter (27%). These proportions are slightly different to the All Wales average where the proportion of ABC1s is lower, although still very high (68%); this might be because visitors to the Wye Valley tend to be older and are more likely to come from outside Wales.

In addition, the proportion of Welsh speaking visitors to sites in the Wye Valley was lower than the average across Wales as a whole (7% were fluent or non-fluent Welsh speakers compared to 14% on average across Wales). Again this is due to the high proportion of visitors coming from outside of Wales.

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

Table 3: Demographic profile of visitors	Wye Valley AONB %	ALL WALES %
Area of residence		
Wales	36	59
Rest of the UK	56	37
Overseas	8	4
Gender		
Male	48	44
Female	52	56
Age		
16 - 24 years	6	7
25 – 34 years	12	15
35 – 44 years	14	20
45 – 54 years	20	19
55 - 64 years	24	18
65+ years	24	20
Social grade		
AB	33	32
C1	41	36
C2	19	20
DE	8	13
Welsh speaking		
Fluent	3	7
Non-fluent	4	7
Non-Welsh speaker	93	85
Ethnicity		
White Welsh / British	87	89
White other	10	6
Non-white / other	3	4

Bases = Stage 1 2016: All Wales (6,652); Wye Valley AONB (547).

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

Most visitor groups to the Wye Valley sites were either couples or families with young children (34% and 27% respectively). This broadly reflects the All Wales profile, although couples make up a higher proportion of visitors to the area than was the case for Wales overall, while families with young children, in contrast, make up a lower proportion than for Wales overall. A further 14% were visiting with friends (higher than for Wales as a whole), while 6% visited alone. The average number of people in each visiting party was 3.2 (2.5 adults and 0.7 children), all of which are slightly lower than the All Wales average of 3.7 (2.7 adults and 1.0 children).

Over four in ten staying visitors to the Wye Valley sites were either first time visitors to Wales or new to this part of Wales (42%), which was higher than the rest of Wales (at 36%). The average number of visits to Wales / this part of Wales was 3.6 in the last 3 years (which is lower than the all Wales average at 4.2).

However, day visitors were much more likely to be frequent visitors, having taken on average 9.5 visits to Wales / this part of Wales in the last year. However, this was lower than the average across Wales (13.1) – see Table 4 below.

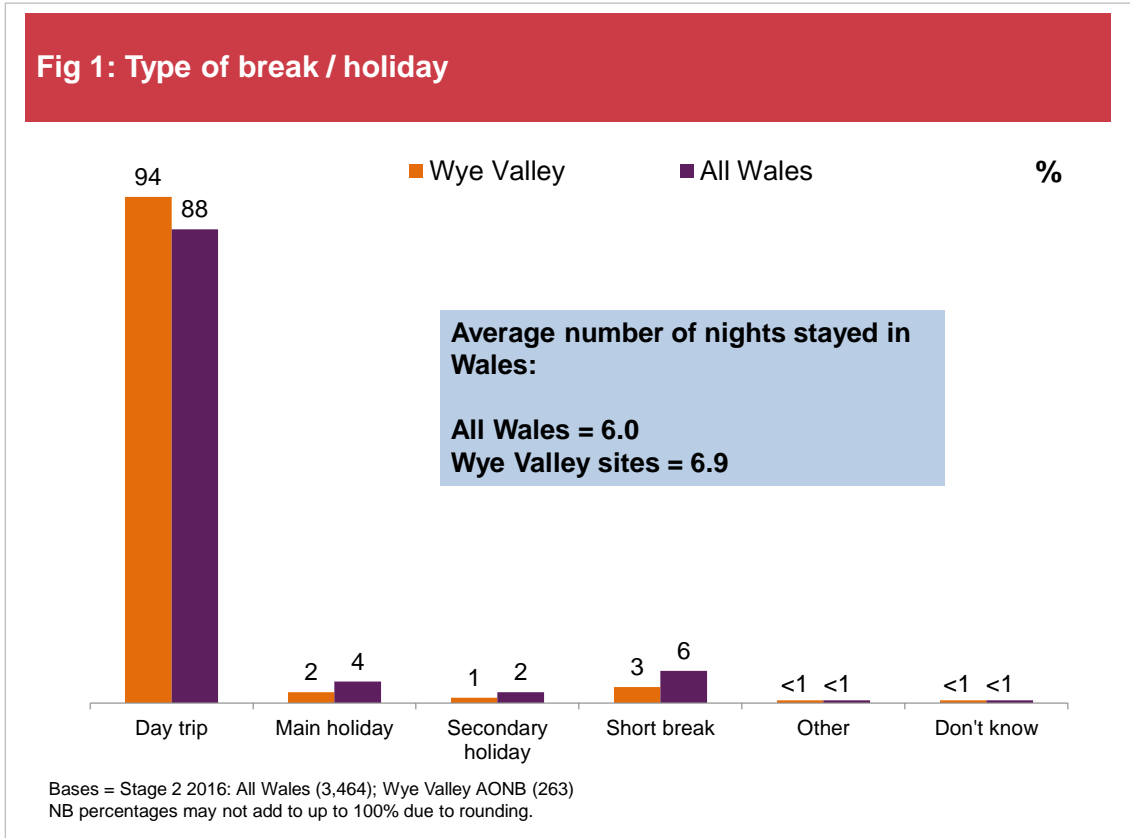
Table 4: Group type and frequency of visiting	Wye Valley AONB %	ALL WALES %
Type of visiting party		
Couple	34	28
Family with young children	27	32
Friends	14	12
Visiting alone	6	8
Family without children	7	7
Family with older children	7	5
Family with younger and older children	3	3
Organised group / society	2	2
Other	1	1
Refused	<1	1
Average size of party		
Average number of adults	2.5	2.7
Average number of children	0.7	1.0
Average total number of people	3.2	3.7
Frequency of visiting in last three years (Staying visitors)		
Stage 2 bases in brackets	(Base =118)	(Base = 1,937)
Once	42	36
2 – 3 times	26	29
4 – 6 times	18	16
7 – 10 times	7	6
More than 10 times	7	12
Don't know	<1	<1
AVERAGE	3.6	4.2
Frequency of visiting in last year (Day visitors)		
Stage 2 bases in brackets	(Base =145)	(Base = 1,527)
Once	26	13
2 – 3 times	19	12
4 – 6 times	12	15
7 – 10 times	10	10
11 – 20 times	7	13
More than 20 times	25	35
Don't know	1	2
AVERAGE	9.5	13.1

Bases = Stage 1 2016: All Wales (6,652); Wye Valley AONB (547).
NB percentages may not add to up to 100% due to rounding.

4.2 Trip profile

The vast majority of visitors to the Wye Valley sites were on a day trip when interviewed (94%); this was higher than the All Wales average of 88%. The majority of them came from England (82%), while 15% of day visitors to the Wye Valley sites lived abroad. Only 3% of day visitors lived in Wales.

The remaining 6% of visitors to Wye Valley were staying in Wales, most commonly on a short break (3%). The proportion of staying visitors interviewed at the Wye Valley sites was lower than among visitors to Wales as a whole (12%). However, visitors were staying in the Wye Valley for slightly longer than across Wales, as the average number of nights stayed at the three sites in the Wye Valley was 6.9 (cf. 6.0 across Wales) – see Figure 1 below.

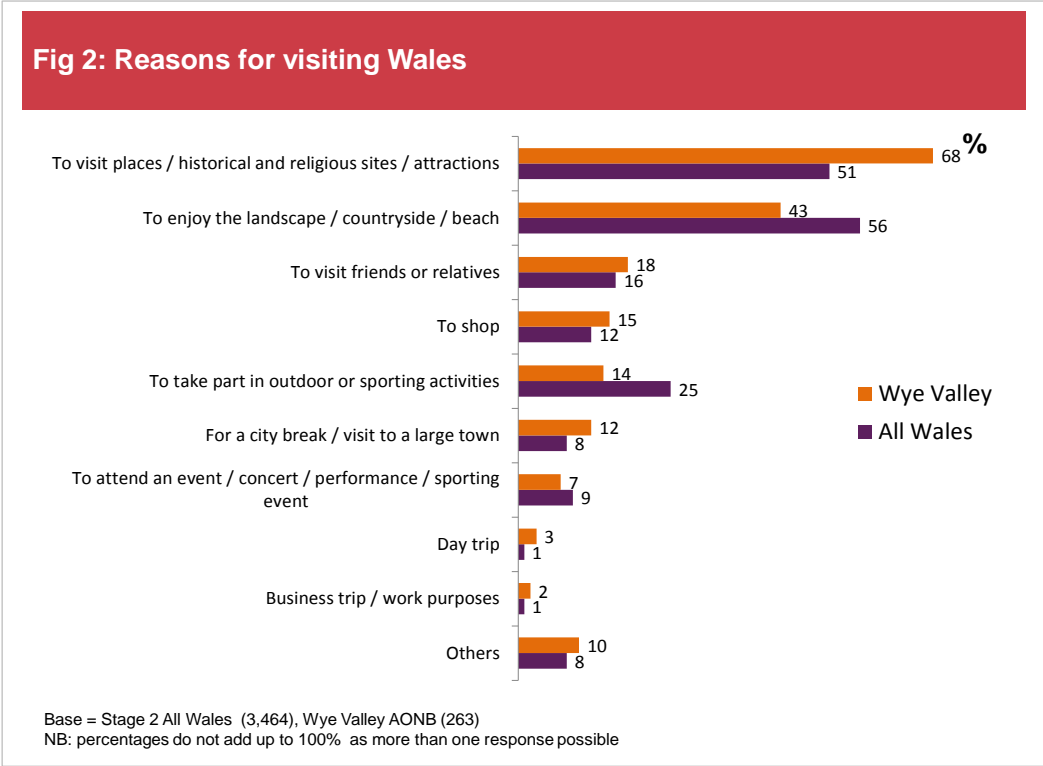


4.3 Motivations for visiting and activities undertaken

4.3.1 Reasons for visiting

Visitors to the Wye Valley were most likely to have come to the area to visit places, historical / religious sites and attractions (68%), higher than was the case among visitors to Wales as a whole (51%). This is probably higher among visitors to the three sites in the Wye Valley because of the interviewing locations selected, for example Tintern Abbey and Chepstow. They were also slightly more likely to mention visiting friends or relatives (at 18% compared with 16% overall), to go shopping (at 15% compared with 12% overall) or to visit a large town (at 12% compared with 8% overall). Again this is because two out of the three of the interviewing locations in the Wye Valley were town centres.

Conversely, despite the fact the area is an area of outstanding natural beauty, visitors to the Wye Valley sites were less likely to say they had come to enjoy the landscape / countryside / beach than was the case for Wales overall (43% of Wye Valley visitors compared with 56% overall) or to take part in outdoor or sporting activities (mentioned by 14% of Wye Valley visitors compared with 25% overall) - see Figure 2 below.



4.3.2 Main activities undertaken while in Wales

Looking in more detail at the specific activities undertaken by visitors interviewed at the Wye Valley sites, the four most popular activities were visiting a castle or historic attraction (54%), general sightseeing (36%), visiting a museum or heritage centre and visiting a religious site (22% for each). Mentions of visiting castles / historic attractions and museums / heritage centres were higher than for Wales as a whole again because of Tintern Abbey and Chepstow Castle.

Outdoor activities were also relatively popular, with around one in ten visiting a nature based attraction (13%), a country park (11%) or walking more than two miles (7%). However, the two latter activities were less popular than they were for Wales overall (at 22% and 14% respectively).

The most popular individual activities undertaken by visitors to the Wye Valley largely reflect the characteristics of the area and the profile of its attractions – see Table 5 below for more details.

Table 5: Most popular individual activities	Wye Valley AONB %	ALL WALES %
Castle or other historic attraction	54	24
General sightseeing	36	27
Visit a museum or heritage centre	22	19
Visit a religious site	22	7
Visit a nature-based attraction	13	13
Visit country parks / forest parks	11	22
Visit an industrial heritage attraction	8	7
Walking more than 2 miles	7	14
Visit gardens	7	14
Visit the beach	6	23
Visit an art-gallery or exhibition	5	5
Visiting a scenic / steam / historic railway	3	5
Wildlife watching	3	7
Visit a wildlife attraction / nature reserve	3	10
Walking less than 2 miles	3	6

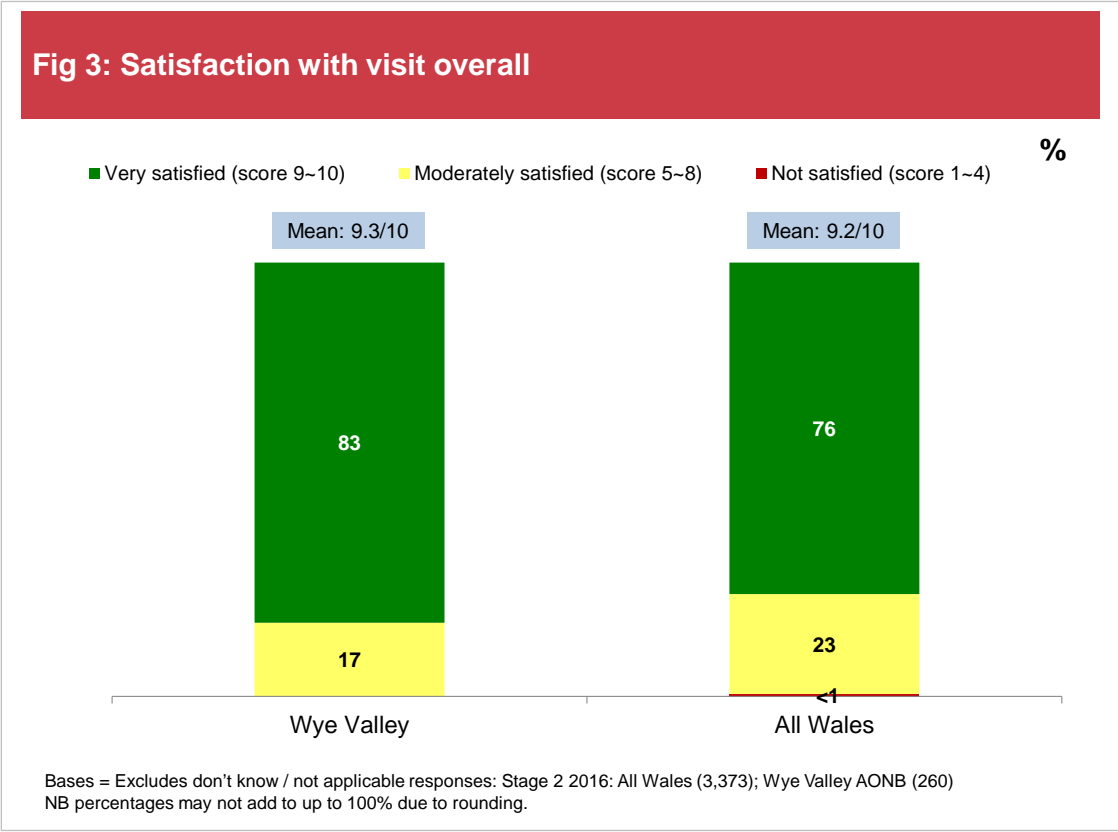
Bases = Stage 2 2016: All Wales (3,464); Wye Valley AONB (263)

4.4 Satisfaction with overall experience, revisiting and recommending

4.4.1 Satisfaction with Wales as a place to visit

Visitors to the Wye Valley sites were highly satisfied with their visit, as was the case among visitors across Wales. On a scale of 1 to 10, where 1 was ‘very dissatisfied’ and 10 was ‘very satisfied’, over eight out of ten visitors to the three Wye Valley sites (83%) gave a score of either 9 or 10 for *Wales overall as a place to visit* – the average score was 9.3/10 (cf. 9.2/10 All Wales mean score).

A further 17% gave more moderate scores of between 5 to 8 / 10, but none of the visitors to any of the sites in the Wye Valley were dissatisfied with their visit – see Figure 3 below.

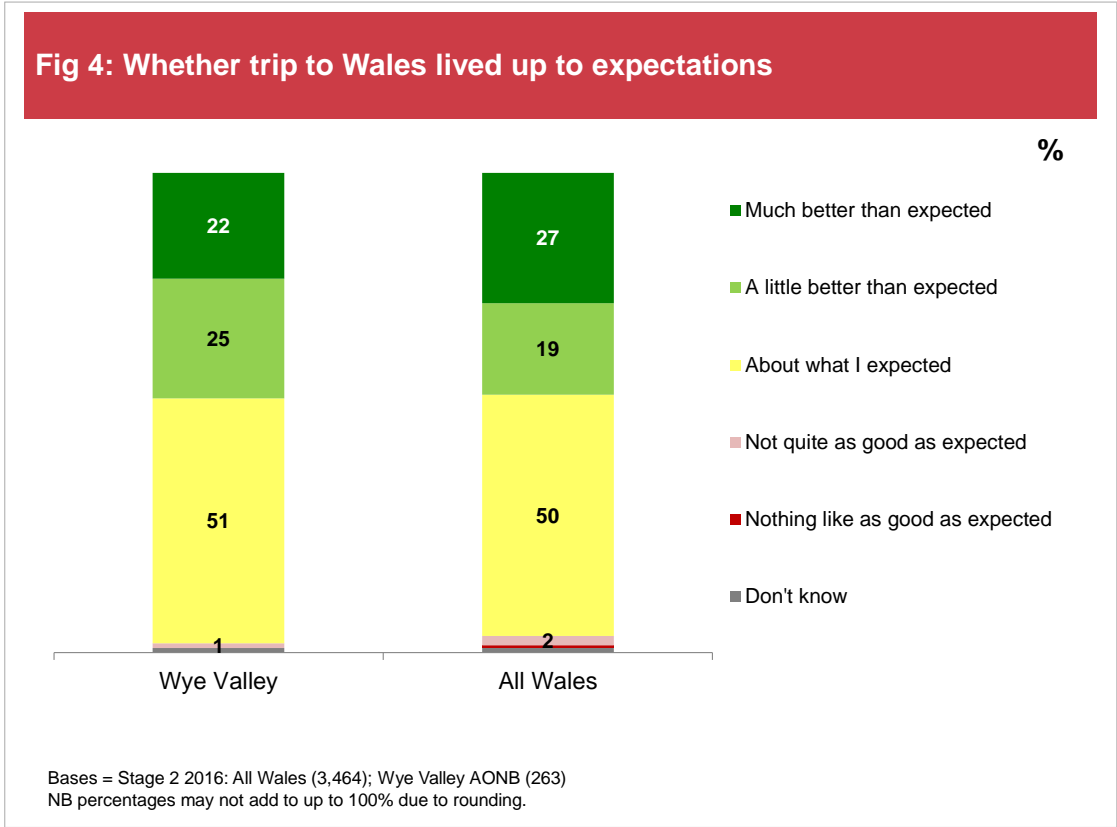


Visitors to Tintern Abbey and Chepstow town centre were most likely to be very satisfied as over eight in ten visitors gave a score of 9 or 10 / 10 (85% and 83% respectively). However, even though Monmouth town centre had slightly lower satisfaction scores, the mean score for was still 9.2.

4.4.2 Expectations

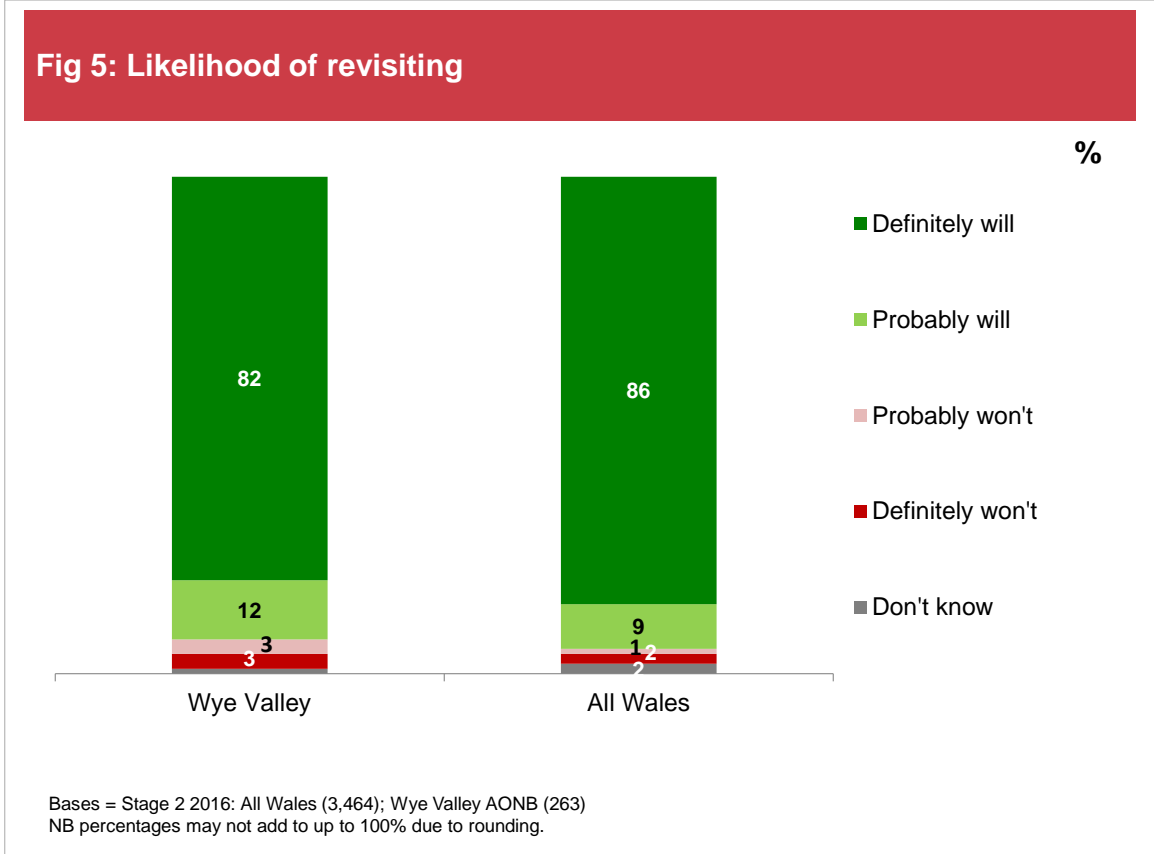
Wales exceeded expectations for almost half of visitors to the Wye Valley, with 47% saying that their trip was better than expected (rising to 54% amongst visitors to Tintern Abbey). Around half felt that their expectations had been met (51%); this rose to 72% amongst visitors to Monmouth town centre (who may be more familiar with what the town has to offer as the average number of repeat visits was highest amongst day visitors here). Only 1% of visitors to the region said that their trip was not quite as good as expected.

Expectations about their trip amongst visitors to the Wye Valley mirrored those of visitors across the whole of Wales, but slightly fewer said it was much better than expected at the Wye Valley sites (22% compared to 27% across Wales)- see Figure 4 below.



4.4.3 Returning to Wales in future

Virtually all visitors to the Wye Valley said they were likely to return in future (94%); 82% said they would definitely visit again, while 12% would probably visit again. These proportions reflect similar findings across the whole of Wales. Only a very small proportion of visitors (6%) said they were not likely to make another visit to Wales – see Figure 5 below.



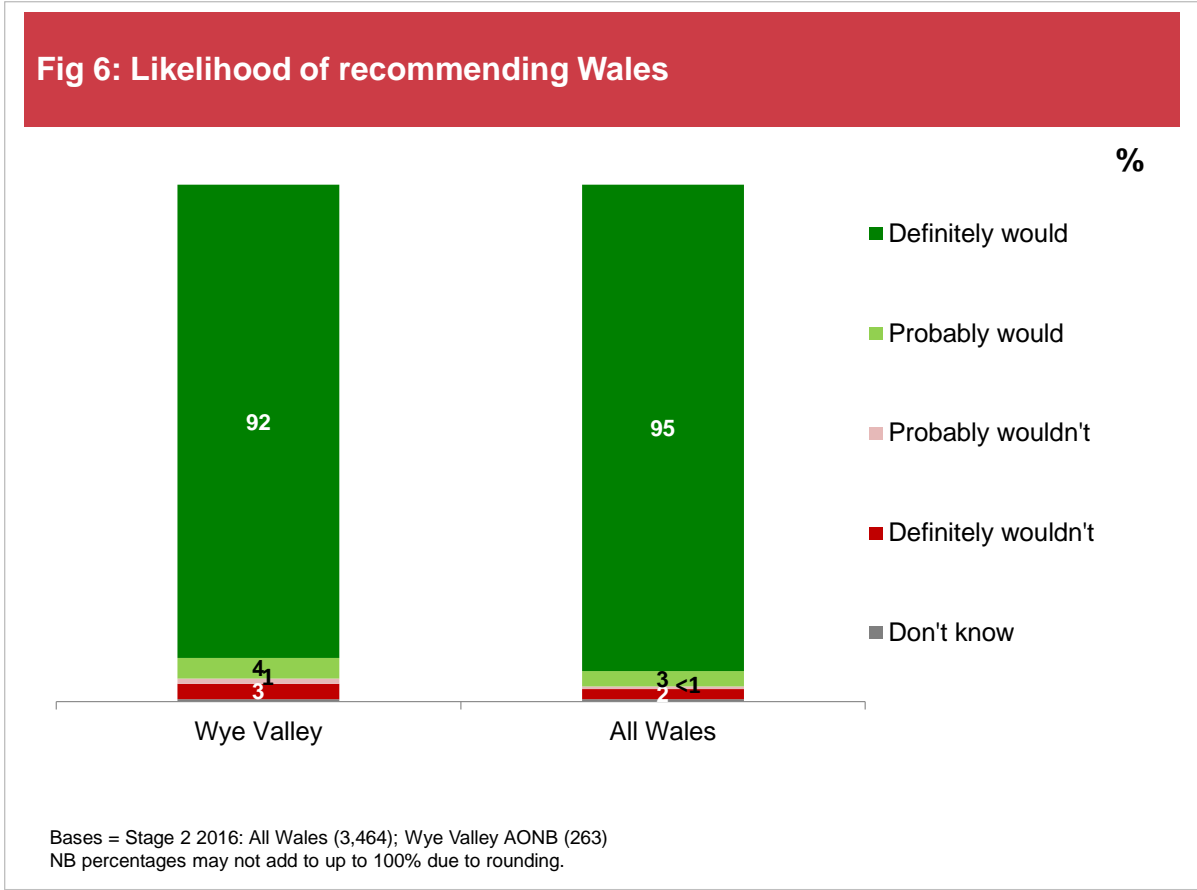
As might be expected, visitors who lived in Wales were most likely to say that they would definitely visit again (90%), although 83% of visitors from the rest of the UK and 27% of overseas visitors to the area said the same.

Similarly, 90% of repeat visitors said they would definitely visit again. However, 66% of new visitors also said that they would definitely return to Wales for another visit.

4.4.4 Recommendation

Reflecting the high levels of visitor satisfaction and strong likelihood of returning in future, virtually all visitors to the Wye Valley sites said that they would recommend Wales as a place to visit (96%); 92% would definitely recommend, and 4% would probably recommend the country to friends and family. Only 4% said that they would not recommend Wales as a place to visit.

Again, the findings for the Wye Valley sites were very similar to those for the whole of Wales – see Figure 6 below.



All the new visitors to Wales or the Wye Valley said they would recommend Wales as a place to visit.

4.5 Specific questions about Wye Valley sites

4.5.3 Visitor expenditure at the Wye Valley sites

Visitors to the two town centres (i.e. Chepstow and Monmouth) were asked how much approximately they had spent during their visit on each of the following:

- Accommodation
- Leisure activities and attractions
- Food and leisure
- Transport in and around the Wye Valley

Spend %	Accommodation	Activities and attractions	Food and Leisure	Transport
Base sizes	Staying visitors to the two town centres Base = 64	All visitors to the two town centres Base = 148	All visitors to the two town centres Base = 148	All visitors to the two town centres Base = 148
Nothing	23	35	8	40
£1 - £10		6	7	15
£11 - £20		5	18	8
£21 - £30	3	7	9	5
£31 - £40		3	6	1
£41 - £50		7	9	4
£51 - £100	6	8	12	<1
£101 - £200	8	3	1	-
£201 - £500	14	<1	3	-
£500 - £1,000	8	-	-	-
£1,001 +	5	-	-	-
Don't know	33	27	27	27
Mean (excluding nothing)	£493.39	£56.87	£58.06	£19.78

As can be expected, staying visitors to the town centres spent most money on their accommodation (average of £436.28), although almost a quarter of staying visitors said they were not spending anything on accommodation, thereby suggesting that they were staying with friends or relatives.

The second highest average spend was on Food and Leisure (£58.06), while the third was on activities and attractions (£56.87). Over a third (37%) of visitors said they had not spent anything on activities or attractions suggesting that the activities undertaken during their visit were free. However, around one in eight (12%) said they spent over £50 on activities and attractions in the area.

Visitors spent least on travel in and around the Wye Valley region, where the average spend was £19.78. This is because the majority of visitors to the Wye Valley sites travelled by private car so some of these visitors might not have necessarily factored in costs such as fuel or car running costs.

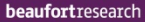
Appendix I: Detailed list of survey locations

Table 12: Individual survey locations by region of Wales		
Region	Attraction	Partner buy-in organisation (if applicable)
North Wales	Anglesey Sea Zoo	
	Bala / Llyn Tegid	Snowdonia National Park
	Beaumaris Town Centre	
	Beddgelert	Snowdonia National Park
	Betws-y-Coed	
	Caernarfon Town Centre	
	Conwy Town Centre	
	Dolgellau	Snowdonia National Park
	Erddig	
	Holyhead Ferry Terminal / Station	Anglesey County Council
	Llanberis	
	Llandudno Promenade	
	Llangollen Town Centre	
	Pontcysyllte Aqueduct	
	Porthmadog Town Centre	
	Rhyl Promenade	
Wepre Country Park		
Wrexham Town Centre		
Mid Wales	Aberaeron	
	Aberystwyth Promenade	
	Brecon Town Centre	
	Cardigan Town Centre	
	Devil's Bridge	
	Elan Valley Visitor Centre	
	Knighton / Presteigne	
	Lake Vyrnwy	Powys County Council
	Machynlleth	
	National Library of Wales	
	New Quay	
	Powis Castle	
Rhayader	Powys County Council	
Storey Arms		
Welshpool Town Centre		

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	Monmouthshire County Council
	Barry Island Seafront Big Pit National Mining Museum	
	Bike Park Wales	South East Wales Tourism Group
	Blaenafon Iron Works Brecon Mountain Railway Bryn Bach Park Caerleon Roman Baths Caerphilly Castle Cardiff Castle Chepstow Town Centre Cosmeston Country Park Cwmcarn Forest Drive	
	Cyfartha Castle	South East Wales Tourism Group
	Dare Valley Country Park	
	Festival Park	South East Wales Tourism Group
	Llancaiach Fawr Manor Millennium Centre / Bay	
	Monmouth Town Centre	Monmouthshire County Council
	National Museum Cardiff Newport City Centre	
	Penarth Pier	South East Wales Tourism Group
	Porthcawl Promenade	

Rhondda Heritage Park	
Royal Mint Experience	South East Wales Tourism Group
St Fagans National History Museum Tintern Abbey Tredegar House	

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

 2 Museum Place, Cardiff CF10 3BG	B01613-1 VISIT WALES VISITOR SURVEY 2016 STAGE 1 (FINAL)	FOR OFFICE USE ONLY		TIME OF INTERVIEW (7)	DAY OF INTERVIEW (8)	WEATHER (9)
	Case (1-4)	Point (5-6)	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	

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

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

S1 Firstly, do you speak Welsh? IF YES (10) is that? Yes – fluently..... 1 → S2 Yes – but not fluently..... 2 → S2 No..... 3 → S3	Q1 (IF STAYING VISITOR S3 – CODES 1 OR 2) How many nights in total will you be staying in Wales? WRITE IN _____ (14-15)
S2 (IF WELSH SPEAKER) We can conduct this interview in (11) English or Welsh – which would you prefer? English..... 1 Welsh..... 2	Q2 (ASK ALL) And are you visiting today with any pets? (16) CAN MULTI-CODE Yes – dog/s 1 Yes – other pet/s 2 No 3
S3 (ASK ALL) - SHOWCARD A Which of these best describes the (12) reason for your trip here today? 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 Day visit to / in Wales – for routine	Q3 Which country do you live in? (17-20m) 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 Europe other (specify) _____ Outside Europe other (specify) _____
business or routine shopping..... 4 THANK AND CLOSE On business..... 5 For study..... 6 Other..... 7	Q4 (IF LIVE IN WALES) In which local authority area do you live? (21) 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
S4 (IF DAY VISITOR S3 – CODE 3) Can I just check, will you be spending (13) three hours or more away from home or your accommodation as part of your visit today – including travel? Yes..... 1 → Q2 No..... 2 → CLOSE	

<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 Marital status (33)</p> <p>Married or equivalent..... 1</p> <p>Single, never married..... 2</p> <p>Widowed, divorced or separated..... 3</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 Are there any children under the age of 15 in your household who you are responsible for (as parent, legal guardian)? (34)</p> <p>Yes..... 1</p> <p>No..... 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 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>Q8 How many people are in your visitor party today, including yourself? (24)</p> <p>WRITE IN NO. OF ADULTS & CHILDREN</p> <table border="1" data-bbox="127 1232 718 1355"> <thead> <tr> <th>ADULTS</th> <th>CHILDREN</th> </tr> </thead> <tbody> <tr> <td style="height: 20px;"></td> <td style="height: 20px;"></td> </tr> </tbody> </table> <p style="text-align: center;">(25-27) (28-30)</p>	ADULTS	CHILDREN			<p>Q14 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>
ADULTS	CHILDREN				
<p>Q9 Gender (31)</p> <p>Male..... 1</p> <p>Female..... 2</p>	<p>Q15 Occupation of Chief Income Earner (last job if retired)</p> <p>Actual job</p> <p>_____</p> <p>Position / grade</p> <p>_____</p>				
<p>Q10 Age (32)</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>	<p>Q16 Social grade (38)</p> <p>AB..... 1</p> <p>C1..... 2</p> <p>C2..... 3</p> <p>DE..... 4</p>				

SHOWCARD C	
Q17 What is your ethnic group? (39)	
White British.....	1
White Welsh.....	2
Other White.....	3
White and Black Caribbean.....	4
White and Black African.....	5
White and Asian.....	6
Other Mixed.....	7
Indian.....	8
Pakistani.....;	9
Bangladeshi.....	A
Other Asian.....	B
Caribbean.....	C
African.....	D
Other Black.....	E
Chinese.....	F
Other	G

SHOWCARD E (44-47m)	
Q19 Have you seen or heard any of these types of advertising, marketing and publicity for Wales before your visit today?	
CAN MULTI-CODE	
TV advertising.....	1
TV programme.....	2
Cinema advertising.....	3
Radio advertising or programmes.....	4
Read an article in a newspaper or magazine (print or online).....	5
Saw an adverts, flyer or supplement in a newspaper / magazine.....	6
Outdoor advertisements (eg posters, bus sides, airports, stations).....	7
Online ads (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 websites (e.g. TripAdvisor).....	B
Word of mouth / conversations with others in person.....	C
Direct mail / flyer.....	D
Email newsletter.....	E
Other.....	F
None of these.....	G

SHOWCARD D	
Q18 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. (40-43m)	
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

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 a landline telephone number for the follow-up telephone interview? Can I also take a mobile 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: _____

Telephone number: LANDLINE _____ MOBILE _____

IF OVERSEAS – RECORD COUNTRY (ASK WHICH STATE THEY LIVE IN IF USA): _____

THANK YOU FOR YOUR TIME – WE WILL CALL YOU IN A FEW WEEKS – PROVIDE LEAFLET

Interviewer Declaration: I declare that I have conducted this interview face to face with the above named person (who is unknown to me) according to your instructions:

Signature	Date of Interview (dd/mm)
	(49)(50)(51)(52)

WRITE IN YOUR INTERVIEWER NUMBER →	(53)	(54)	(55)	(56)
---	------	------	------	------

B01613	Accompanied	Yes 1 No 2	Supervisor signature:	QUOTA (57)
				UK DAY 1 UK STAYING 2 OVERSEAS STAYING 3 OVERSEAS DAY 4

Appendix III: Stage 2 survey questionnaire (telephone interviews)

B01613-2
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

SECTION 1 – VISITING WALES

ASK IF STAYING VISITOR (FROM SAMPLE)

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 (FROM SAMPLE)

Q2 How many times in the last year have you taken a day trip in/to Wales [use wording 1 if live in Wales / wording 2 if live outside 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 (FROM SAMPLE)

Q3 What type of trip was your recent trip in/to Wales [use wording 1 if live in Wales / wording 2 if live outside Wales)? **READ OUT**

Main holiday of the year
Secondary / additional holiday
Short break
Other (**please specify**)

Don't know / can't remember

ASK IF STAYING VISITOR (FROM SAMPLE)

Q4 Did you stay in any other countries (in Europe) besides Wales on your recent trip?

Yes – England → **Q5**
Yes – Scotland → **Q5**
Yes – NI → **Q5**
Yes – Ireland → **Q5**
Yes – other European country/ies (**please specify**) → **Q5**
No, just stayed in Wales → **Q7**

Don't know / can't remember → **Q7**

ASK IF YES AT Q4

Q5 How many nights did you stay in any other countries besides Wales during your recent trip?
WRITE IN NUMBER

Don't know / can't remember

ASK IF YES AT Q4

Q6 Which one of the following statements best applies to your trip?
READ OUT – SINGLE CODE

1. Wales was my main 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 ALL STAYING VISITOR (FROM SAMPLE)

Q7 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 (FROM SAMPLE)

Q8 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 (FROM SAMPLE)

Q9 What was your main method of transport to reach Wales?
READ OUT AS NECESSARY - SINGLE CODE - RECORD IN COLUMN A

ASK ALL

Q10 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

	Q9	Q10
	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

ASK ALL

Q11 Which of the following were your reasons for visiting Wales [IF LIVE OUTSIDE OF WALES] / visiting the part of Wales where we interviewed you a few weeks ago [IF LIVE IN WALES]? **READ OUT – CODE ALL MENTIONED – RECORD IN COLUMN A**

IF MORE THAN ONE CODED AT Q11 ASK Q12 – POPULATE WITH RESPONSES FROM Q11

Q12 And which one was your main reason for visiting Wales / visiting the part of Wales where we interviewed you? **READ OUT – SINGLE CODE – RECORD IN COLUMN B**

To take part in outdoor or sporting activities (e.g. walking, cycling, fishing etc.) → **Q13**

To attend an event / concert / performance / sporting event → **Q14**

To enjoy the landscape / countryside / beach → **Q15**

To visit places / historical sites / religious sites / specific attractions / sightseeing → **Q16**

For a city break / visit to a large town → **Q16**

To shop

To visit friends or relatives (including also special events such as weddings or graduations)

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 Q11

Q13 Which of the following did you take part in during your trip? **PROBE** Any other outdoor or sporting activities? **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

Other (**please specify**)

Don't know / can't remember

ASK IF CODE 2 AT Q11

Q14 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 Q11

Q15a 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 → **Q15b**
- 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 Q15a

Q15b 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 Q11

Q16 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 Q17

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

GO TO SECTION 4

ASK IF CODE 1-10 AT Q16

Q17 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

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 (FROM SAMPLE)

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 (e.g. airbnb)
- 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 (FROM SAMPLE)

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 (FROM SAMPLE)

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 (FROM SAMPLE)

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 the www.visitWales.com website

Through a travel agent or tour operator

Through a tourist information centre

Just turned up → **SKIP Q24**

Other (**please specify**) → **SKIP Q24**

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

ASK IF STAYING VISITOR (FROM SAMPLE) 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

SECTION 6 – SOURCES OF INFORMATION AND MARKETING

ASK ALL

Q25 In planning and gathering information for your recent trip in/to Wales [use wording 1 if live in Wales / wording 2 if live outside 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 Q25)

Q26 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 Q26

Q27 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)

Q28 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

Q29 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 USED ONLINE SOURCES (1 OR 3 AT Q29)

Q30 How did you or your party access online information during your trip?
DO NOT PROMPT – CODE ALL MENTIONED

Mobile phone or other handheld device
Own laptop
Tablet
Laptop or computer at friend's or relative's house
Computer elsewhere (e.g. accommodation, internet cafe, TIC, library)
Other (**please specify**)

Don't know / can't remember

ASK IF USED ONLINE SOURCES (1 OR 3 AT Q29)

Q31 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 Q31

Q32 Can you remember which types of website 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 Q29

Q33 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

Q34 Have you seen or heard any advertising, marketing or publicity for 'Year of Adventure 2016'?
SINGLE CODE

Yes
No

Don't know / can't remember

IF YES AT Q34

Q35 To what extent did the 'Year of Adventure 2016' 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

Q36 How important is it to you that the accommodation you choose to visit is managed sustainably? By 'sustainably' we mean preserving the environment and being fair-trade.
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

Very important

Quite important

Not very important

Not at all important

Don't know

ASK ALL

Q37 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

Q38 Thinking about your recent visit in/to Wales [use wording 1 if live in Wales / wording 2 if live outside 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

Q39 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

Q40 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 | 11. Sea water quality |
| 2. Places to visit in Wales | 12. Accessibility for people with a disability / long-term illness |
| 3. Quality of the natural environment | 13. How pet-friendly you found it to be |
| 4. Shopping | 14. Quality and availability of public transport |
| 5. Feeling of welcome | 15. Wales overall as a place to visit → |
| 6. Cleanliness of streets | ALWAYS COMES AT THE END OF THE LIST |
| 7. Feeling of security | |
| 8. Cleanliness and availability of public toilets | |
| 9. Standard of tourist signposting | |
| 10. Cleanliness of beaches | |

SINGLE CODE

- 1 – Very dissatisfied
- 2
- 3
- 4
- 5
- 6

- 7
- 8
- 9
- 10 – Very satisfied
- Not applicable
- Don't know

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

Q41 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? **PROBE** – Anything else?
RECORD VERBATIM

Nothing
Don't know

ASK ALL

Q42 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

Q43 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 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

ANY PARTNER-SPECIFIC QUESTION TO BE ADDED HERE

ASK ALL

Q45 Finally, do you have any other comments you would like to make about your trip to/in Wales? **RECORD VERBATIM**

No other comments

ASK ALL

Q46 Would you be willing to be re-contacted by Visit Wales or selected partners to take part in further research?

Again, all information provided will be completely confidential, and by saying yes now, you will not be committing yourself to a further interview when 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.

Thanks again and goodbye.

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