

Research Report

Wales Visitor Survey 2016

Vale of Glamorgan Council



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Vale of Glamorgan Council

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1. Executive summary

1.1 Introduction

This report focuses on **visitors within the Vale of Glamorgan unitary authority area**; **438** interviews were conducted at Stage 1 and a further **220** were conducted at Stage 2 with visitors to 3 locations in the Vale of Glamorgan (see page 5).

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:

The majority of visitors to the Vale of Glamorgan are from Wales (78%), which is higher than for Wales as a whole (59%). This reflects the higher proportion of day visitors to this area than to Wales generally. Following on from this, the Vale of Glamorgan as a whole receives fewer visitors from outside of Wales compared to all sites across Wales (22% cf. 41% all Wales). Of these, 21% live in the rest of the UK (cf. 37% all Wales) and just 1% live overseas (cf. 4% all Wales).

Barry Island receives a higher than average proportion of younger visitors aged 16-34 years (25% cf. 22% all Wales), while Cosmeston and Penarth Pier receive much lower than average (8%). In fact, most of the visitors to Cosmeston and Penarth Pier are aged 55+ (68%), compared to 30% at Barry Island and 38% across the whole of Wales.

Most visitor groups to the Vale of Glamorgan area are either family groups with young children, or couples (42% and 23% respectively). This broadly reflects the all Wales profile, although families with young children make up a significantly higher proportion of visitors to the area than is the case for Wales overall (32%), while couples, in contrast, make up a lower proportion than for Wales overall (28%).

The average number of people in each visiting party is 7.8 (4.8 adults and 3.0 children), which is considerably higher than the all Wales average of 3.7 (2.7 adults and 1.0 children). This is being driven by large visitor groups at Barry Island, which contain an average of 12.4 people (7.2 adults and 5.2 children).

Trip profile:

The vast majority of visitors to the Vale of Glamorgan were on a day trip when interviewed (95%); this was higher than the all Wales average of 88%. The remaining 5% of visitors to the Vale of Glamorgan were staying in Wales, most commonly on a short break (4%). The proportion of staying visitors interviewed in the Vale was lower than among visitors to Wales as a whole (12%), although the average number of nights stayed was equal to the all Wales average (6.0).

Motivations for visiting and activities undertaken:

Visitors to the Vale of Glamorgan were most likely to have come to the area to enjoy the landscape, countryside and beaches (76%), much more so than was the case among visitors to Wales as a whole (51%). It should be noted, however, these motivating factors will be determined to a large extent by the nature of the interviewing locations (two beaches and one Country Park).

Looking in more detail at the specific activities undertaken by visitors interviewed in the Vale of Glamorgan; the most popular activity by far was visiting the beach (60%), which was mentioned by significantly more people than was the case across the whole of Wales (23%). This is driven primarily by the fact that two of three interviewing locations in the Vale of Glamorgan were located by the sea (Barry Island and Penarth Pier), and is reflected in the high number of visitors mentioning this activity at these locations.

Satisfaction with the overall experience, revisiting and recommending:

In general, visitors to the Vale of Glamorgan 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', over three quarters of visitors to the Vale (77%) gave a score of either 9 or 10 for *Wales overall as a place to visit* – the average score was 9.2/10 (equal to the all Wales mean score). A further 22% gave more moderate scores of between 5 to 8 / 10, while only 1% of visitors were dissatisfied with their visit.

Their trip to / in Wales exceeded expectations for almost half of visitors to the Vale of Glamorgan, with 45% saying that their trip was better than expected. Around half felt that their expectations had been met (51%), while only 3% of visitors to the region said that their trip was not as good as expected.

Virtually all visitors to the Vale of Glamorgan said they were likely to return in future (95%); 90% said they would definitely visit again (higher than the all Wales average of 86%), while 5% would probably visit again (cf. 9% all Wales). Only a very small proportion of visitors (3%) said they were not likely to make another visit to the region.

Reflecting the high levels of visitor satisfaction and strong likelihood of returning to Wales in future, over nine in ten visitors to the Vale of Glamorgan said that they would recommend it as a place to visit (93%); 91% would definitely recommend, and 2% would probably recommend the area to friends and family. However, 6% said that they would not recommend Wales as a place to visit. The findings for the Vale of Glamorgan are, therefore, slightly less positive than was seen across the whole of Wales, where 97% would recommend Wales and only 2% would not.

2. 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 **Vale of Glamorgan unitary authority** area, at the following locations:

- Barry Island Seafront
- Cosmeston Country Park
- Penarth Pier.

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). **438** interviews were conducted at Stage 1 across **3 locations** within the Vale of Glamorgan 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 **220** telephone interviews were conducted with visitors to the Vale of Glamorgan.

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 in the Vale of Glamorgan

Table 1: Locations	Stage 1 Interviews	Stage 2 Interviews
Barry Island Seafront	238	110
Cosmeston Country Park	29	14
Penarth Pier	171	96
TOTAL	438	220

4. Research findings

4.1 Visitor profile

The majority of visitors to the Vale of Glamorgan are from Wales (78%), which is higher than for Wales as a whole (59%). This reflects the higher proportion of day visitors to this area than to Wales generally (see figure 1 on p10). Following on from this, the Vale of Glamorgan as a whole receives fewer visitors from outside of Wales compared to all sites across Wales (22% cf. 41% all Wales). Of these, 21% live in the rest of the UK (cf. 37% all Wales) and just 1% live overseas (cf. 4% all Wales).

There are differences, however, between Barry Island and Cosmeston / Penarth Pier; the Island sees a much higher proportion of visitors from the rest of the UK (31%) compared to Cosmeston and Penarth Pier (9%).

There is a pronounced skew towards more female (68%) than male visitors (32%) in the Vale of Glamorgan; while this gender bias is reflected in the all Wales figures (44% male, 56% female), the skew is much more pronounced in the Vale. This is driven to a large extent by the high number of female visitors to Barry Island (72%), although there are also higher than average female visitors to Cosmeston and Penarth Pier (64%).

Although overall there are fewer younger people aged 16-34 visiting the Vale of Glamorgan compared to the overall Wales average (17% cf. 22%), there are marked differences between locations in the Vale; Barry Island receives higher than average younger visitors (25%), while Cosmeston and Penarth Pier receive much lower than average (8%). In fact, most of the visitors to Cosmeston and Penarth Pier are aged 55+ (68%), compared to 30% at Barry Island and 38% across the whole of Wales.

There are also notable differences in the socio-economic profiles of visitors to Barry Island and Cosmeston / Penarth Pier. The latter attracts a higher proportion of more affluent ABC1¹ visitors (67%) compared to Barry Island (48%), while less affluent C2DE visitors account for over half of visitors to the Island (52%) and a only a third of visitors to Cosmeston / Penarth Pier (33%).

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

So, while the socio-economic profile of visitors to Cosmeston / Penarth Pier is in line with the all Wales average (68% ABC1 and 33% C2DE), the profile of the visitors to Barry Island is significantly different.

The ethnic profile of visitors to Barry Island also differs significantly to both Cosmeston / Penarth Pier and the all Wales average; significantly more people from non-white ethnic backgrounds visit the Island (11%) compared to Cosmeston / Penarth Pier (2%) and Wales as a whole (4%) - see Table 3 below.

Table 2: Demographic profile of visitors	VALE OF GLAMORGAN TOTAL %	BARRY ISLAND %	COSMESTON / PENARTH %	ALL WALES %
Area of residence				
Wales	78	68	90	59
Rest of the UK	21	31	9	37
Overseas	1	1	1	4
Gender				
Male	32	28	36	44
Female	68	72	64	56
Age				
16 - 24 years	5	8	2	7
25 – 34 years	12	17	6	15
35 – 44 years	20	25	14	20
45 – 54 years	14	19	10	19
55 - 64 years	21	16	26	18
65+ years	27	14	42	20
Social grade				
AB	23	17	29	32
C1	34	31	38	36
C2	20	24	16	20
DE	22	28	17	13
Welsh speaking				
Fluent	5	5	7	7
Non-fluent	6	5	8	7
Non-Welsh speaker	88	91	85	85
Ethnicity				
White Welsh / British	90	86	95	89
White other	2	3	2	6
Non-white / other	7	11	2	4

Bases = Stage 1 2016: Vale of Glamorgan total (438), Barry Island (238), Cosmeston / Penarth (200), all Wales (6,652).

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

Most visitor groups to the Vale of Glamorgan area are either family groups with young children, or couples (42% and 23% respectively). This broadly reflects the all Wales profile, although families with young children make up a significantly higher proportion of visitors to the area than is the case for Wales overall (32%), while couples, in contrast, make up a lower proportion than for Wales overall (28%).

Furthermore, families with younger children account for a much higher proportion of visitors to Barry Island (62%) compared to Cosmeston and Penarth Pier (21%), while couples are more prevalent at the latter locations (35%) compared to the former (12%).

A further 11% are visiting the Vale with friends (in line with Wales as whole), although there are more groups of friends visiting Cosmeston / Penarth Pier (16%) compared to Barry Island (7%). There are also more people visiting the latter locations alone (11%) compared to Barry Island (3%).

The average number of people in each visiting party is 7.8 (4.8 adults and 3.0 children), which is considerably higher than the all Wales average of 3.7 (2.7 adults and 1.0 children). This is being driven by large visitor groups at Barry Island, which contain an average of 12.4 people (7.2 adults and 5.2 children).

The Vale of Glamorgan receives a high proportion of repeat visitors, both amongst those people who live outside of Wales and those who live in Wales. Over eight in ten (84%) visitors to the Vale (who live outside Wales) have visited before (compared to 64% for all Wales). The average number of visits to the area in the last 3 years is 4.6 (cf. 4.2 all Wales), although this is higher for visitors to Cosmeston / Penarth Pier (5.9 visits) than for visitors to Barry Island (4.8).

Similarly, visitors who live in Wales are more likely to be frequent repeat visitors to the Vale of Glamorgan, having taken on average 14.8 visits to Wales / this part of Wales in the last year (higher than the all Wales average of 13.1). Again, Cosmeston / Penarth Pier receive a higher number of annual visits (16.7) compared to Barry Island (12.8) – see Table 4 overleaf.

Table 3: Group type and frequency of visiting	VALE OF GLAMORGAN TOTAL %	BARRY ISLAND %	COSMESTON / PENARTH %	ALL WALES %
Type of visiting party				
Family with young children	42	62	21	32
Couple	23	12	35	28
Friends	11	7	16	12
Family without children	8	3	13	7
Visiting alone	7	3	11	8
Organised group / society	5	9	-	2
Family with older children	3	2	3	5
Family with younger and older children	1	1	-	3
Other	<1	1	-	1
Refused	1	-	1	1
Average size of party				
Average number of adults	4.8	7.2	2.2	2.7
Average number of children	3.0	5.2	0.4	1.0
Average total number of people	7.8	12.4	2.6	3.7
Frequency of visiting in last three years (live outside of Wales)				
Stage 2 bases in brackets	(Base = 45)	(Base = 27)	(Base = 18)	(Base = 1,937)
Once	16	15	17	36
2 – 3 times	42	52	28	29
4 – 6 times	22	19	28	16
7 – 10 times	7	4	11	6
More than 10 times	13	11	17	12
Don't know	-	-	-	<1
AVERAGE	4.6	4.8	5.9	4.2
Frequency of visiting in last year (live in Wales)				
Stage 2 bases in brackets	(Base = 175)	(Base = 85)	(Base = 92)	(Base = 1,527)
Once	10	14	5	13
2 – 3 times	10	12	8	12
4 – 6 times	9	10	9	15
7 – 10 times	13	18	9	10
11 – 20 times	14	11	17	13
More than 20 times	41	34	48	35
Don't know	3	1	4	2
AVERAGE	14.8	12.8	16.7	13.1

Bases = Stage 1 2016: Vale of Glamorgan total (438), Barry Island (238), Cosmeston / Penarth (200), all Wales (6,652).

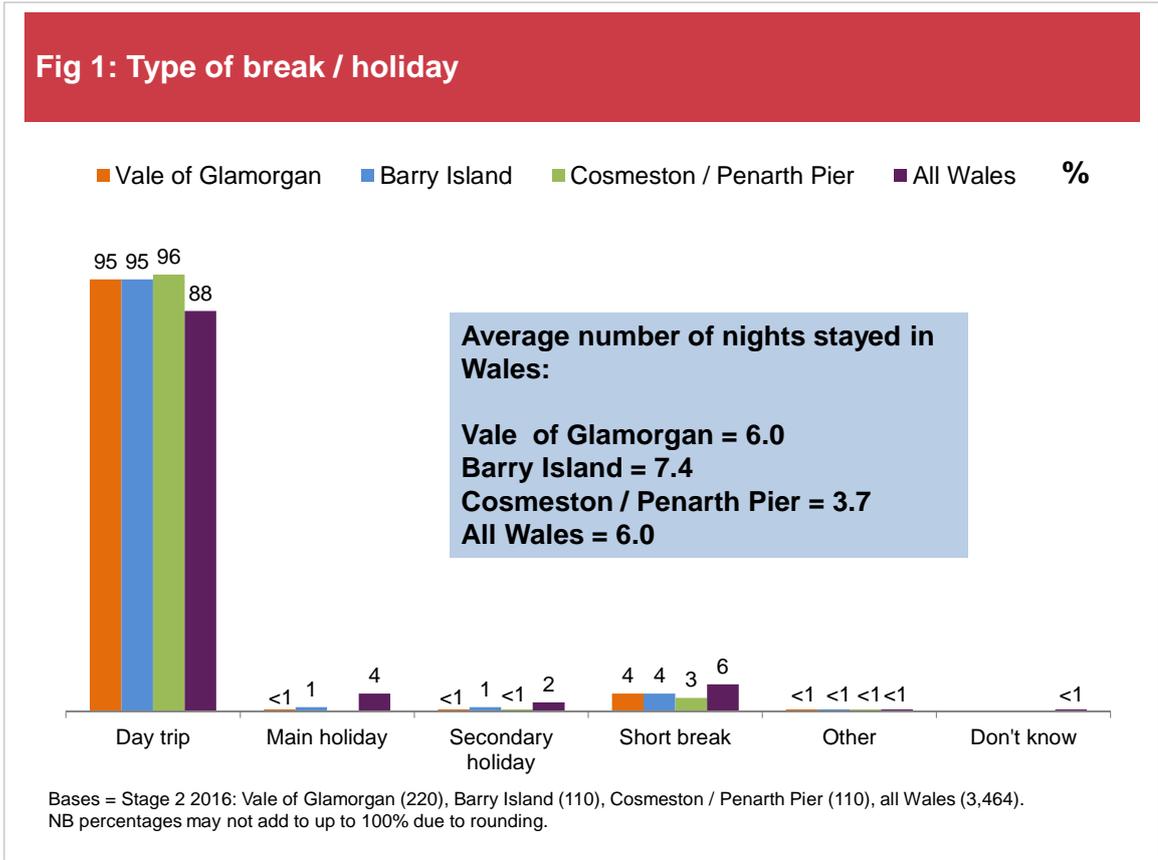
NB percentages may not add to up to 100% due to rounding.

4.2 Trip profile

The vast majority of visitors to the Vale of Glamorgan were on a day trip when interviewed (95%); this was higher than the all Wales average of 88%. As might be expected, the majority of day visitors in the Vale lived in Wales (82%), although a sizeable proportion came from the rest of the UK (18%); only 1 day visitor lived abroad.

The remaining 5% of visitors to the Vale of Glamorgan were staying in Wales, most commonly on a short break (4%) - short-break visitors tended to live in the rest of the UK (88%).

The proportion of staying visitors interviewed in the Vale was lower than among visitors to Wales as a whole (12%), although the average number of nights stayed was equal to the all Wales average (6.0). Staying visitors interviewed at Barry Island were staying longer in Wales (average 7.4 nights) compared to those interviewed at Cosmeston / Penarth Pier (average 3.7 nights) – see Figure 1 below.

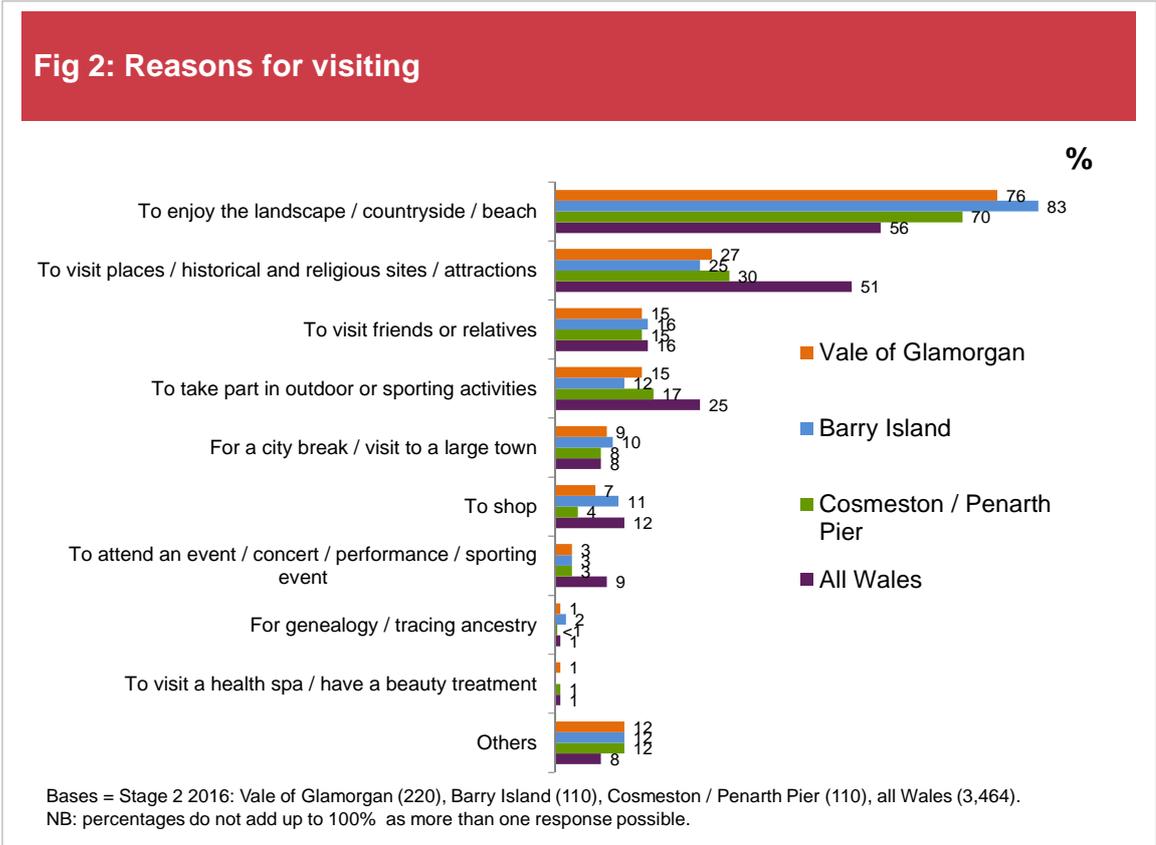


4.3 Motivations for visiting and activities undertaken

4.3.1 Reasons for visiting

Visitors to the Vale of Glamorgan were most likely to have come to the area to enjoy the landscape, countryside and beaches (76%), much more so than was the case among visitors to Wales as a whole (51%). Over eight in ten visitors to Barry Island came for this reason (83%), and seven in ten visitors to Cosmeston / Penarth Pier (70%) said the same. It should be noted, however, these motivating factors will be determined to a large extent by the nature of the interviewing locations (two beaches and one Country Park).

Conversely, Vale of Glamorgan visitors were less likely to say they had come to visit places, historical sites and attractions than was the case for Wales overall (27% of Vale visitors compared with 51% all Wales) or to take part in outdoor or sporting activities (15% of Vale of Glamorgan visitors compared with 25% all Wales). Furthermore, Vale of Glamorgan visitors were less likely to have come to the area to attend an event or concert (3% cf. 9% for all Wales) - see Figure 2 below.



4.3.2 Main activities undertaken while in South East Wales

Looking in more detail at the specific activities undertaken by visitors interviewed in the Vale of Glamorgan; the most popular activity by far was visiting the beach (60%), which was mentioned by significantly more people than was the case across the whole of Wales (23%). This is driven primarily by the fact that two of three interviewing locations in the Vale of Glamorgan were located by the sea (Barry Island and Penarth Pier), and is reflected in the high number of visitors mentioning this activity at these locations.

General sightseeing was mentioned by a fifth of visitors to the Vale (21%), lower than was seen across the whole of Wales (27%), while visiting country parks was only mentioned by a tenth (11%), half the all Wales average of 22%. As would be expected, visitors to Cosmeston / Penarth Pier were more likely to say they had visited the area to go to a country park (18%).

Walking for distances further than 2 miles was also less popular in the Vale compared to all Wales (8% cf. 14%), as was visiting gardens (5% cf. 14%) and castles (4% cf. 24%). However, slightly more than average had visited a theme or amusement park, especially at Barry Island (11%). These proportions will no doubt reflect the characteristics of the area and the profile of its attractions – see Table 4 below for more details.

Table 4: Most popular individual activities	VALE OF GLAMORGAN TOTAL %	BARRY ISLAND %	COSMESTON / PENARTH %	ALL WALES %
Visit the beach	60	78	43	23
General sightseeing	21	21	22	27
Visit country parks / forest parks	11	5	18	22
Walking more than 2 miles	8	7	9	14
Visit a theme / amusement park	5	11	<1	2
Visit gardens	5	3	6	14
Wildlife watching	5	5	5	7
Walking less than 2 miles	5	6	5	6
Visit a specific attraction	5	1	7	3
Visit a castle or other historic attraction	4	5	3	24

Bases = Stage 2 2016: Vale of Glamorgan total (220), Barry Island (110), Cosmeston / Penarth (110), all Wales (3,464).

NB percentages do not add to up to 100% as more than one response possible.

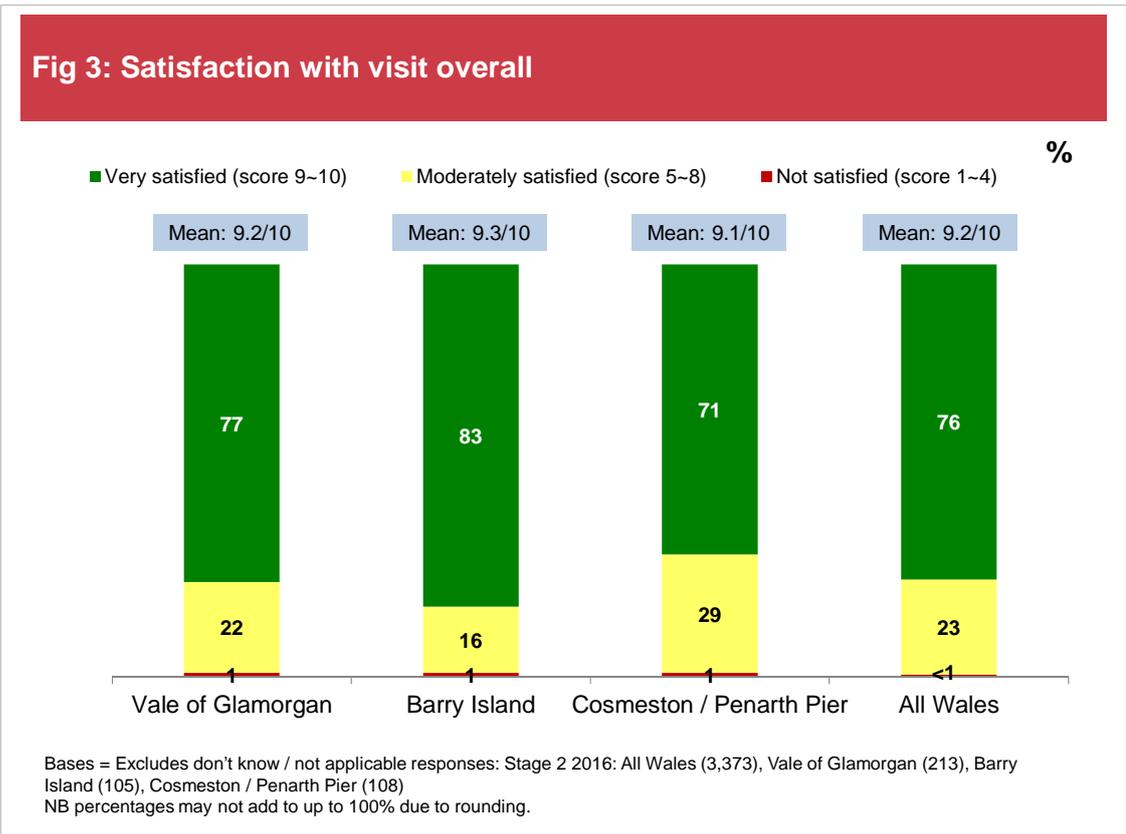
4.4 Satisfaction with overall experience, revisiting and recommending

4.4.1 Satisfaction with Wales as a place to visit

In general, visitors to the Vale of Glamorgan 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’, over three quarters of visitors to the Vale (77%) gave a score of either 9 or 10 for *Wales overall as a place to visit* – the average score was 9.2/10 (equal to the all Wales mean score).

A further 22% gave more moderate scores of between 5 to 8 / 10, while only 1% of visitors were dissatisfied with their visit.

Satisfaction levels were highest at Barry Island, with 83% giving a score of 9 or 10. In contrast, at Cosmeston / Penarth Pier, satisfaction scores were somewhat lower than the all Wales average (71%) – see Figure 3 below.



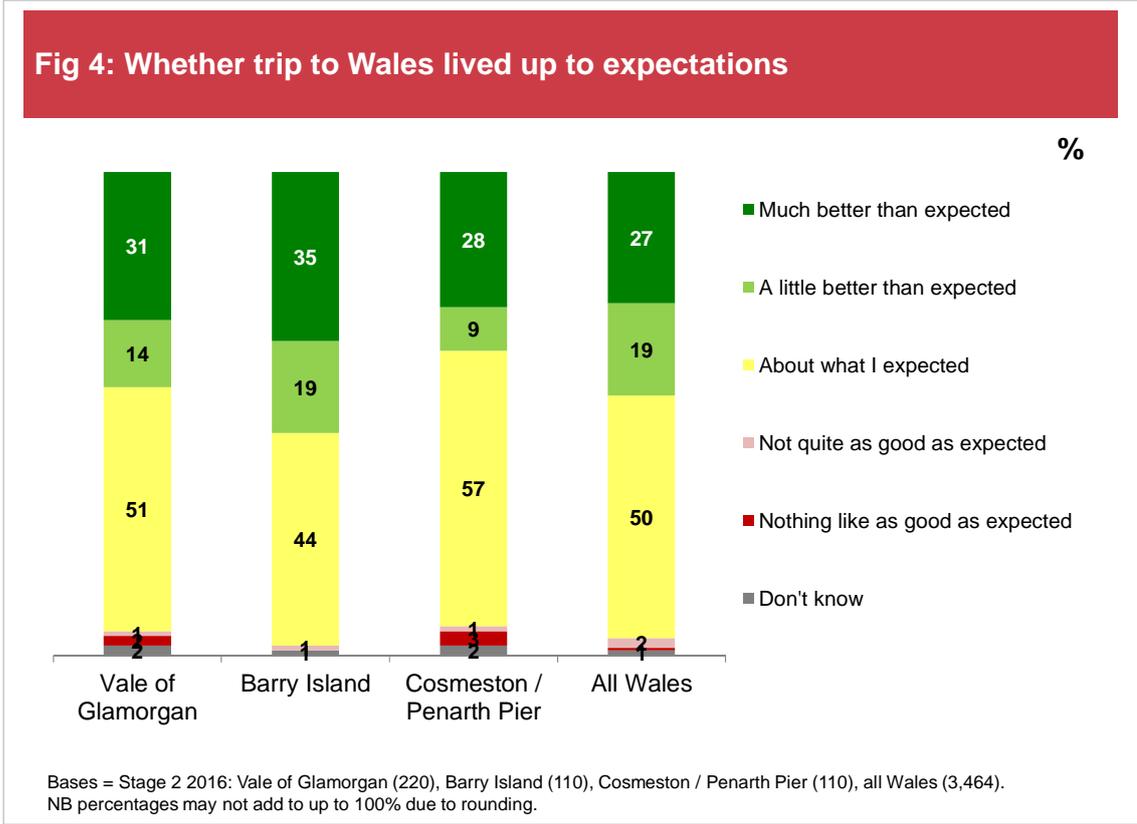
There were a few noticeable differences in satisfaction levels across different types of visitor; repeat visitors were more likely to give a ‘Very satisfied’ score than new visitors (56% cf. 38%), with the same being said of visitors aged 16-54 (61%), compared to those aged 55+ (49%).

4.4.2 Expectations

Wales exceeded expectations for almost half of visitors to the Vale of Glamorgan, with 45% saying that their trip was better than expected; this rose to 54% amongst visitors to Barry Island, but declined to 37% amongst visitors to Cosmeston / Penarth Pier.

Around half felt that their expectations had been met (51%); this rose to 57% amongst visitors to Cosmeston / Penarth Pier, locations where the frequency of repeat visits is high, and presumably visitors are aware of what is on offer in the area. Only 3% of visitors to the region said that their trip was not as good as expected.

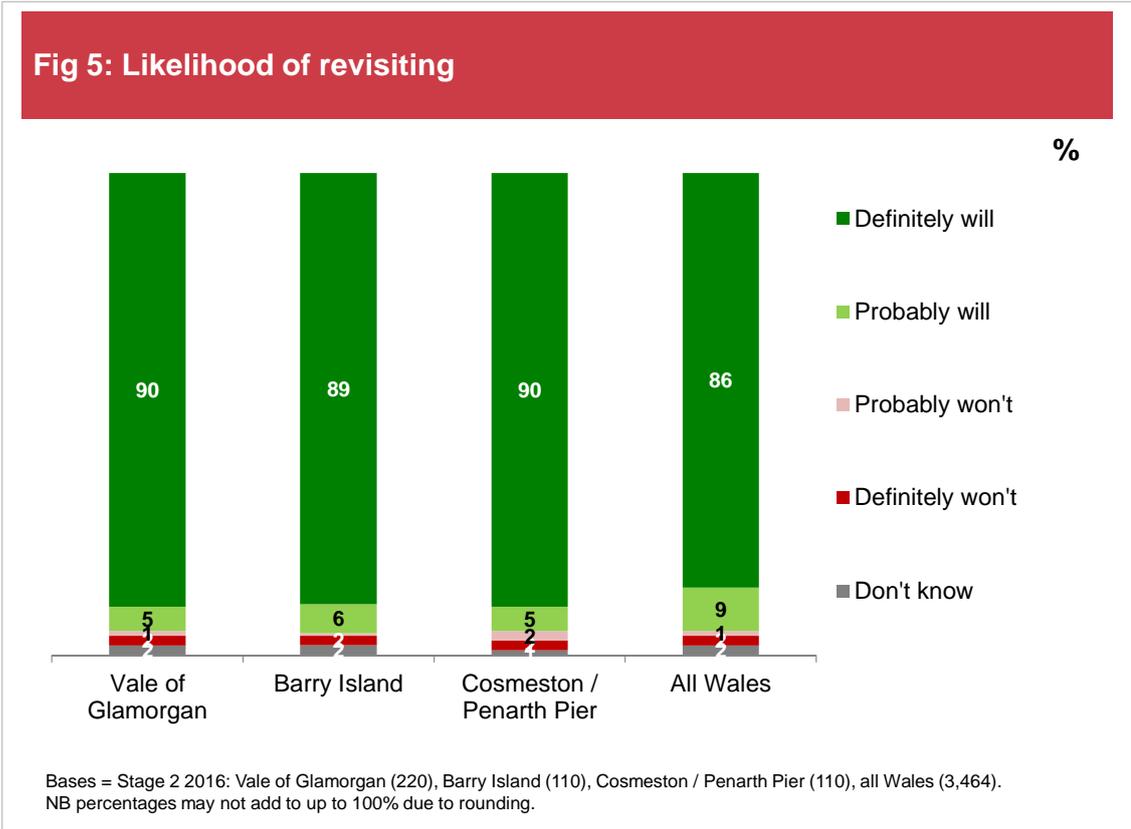
Comparing results for the Vale of Glamorgan to Wales as a whole; a higher proportion of visitors to the Vale felt that their trip was much better than expected than was said across the whole of Wales (31% cf. 27%); this is primarily driven by findings from Barry Island, where 35% of visitors felt that their expectations had been greatly exceeded - see Figure 4 below.



4.4.3 Returning to Wales in future

Virtually all visitors to the Vale of Glamorgan said they were likely to return in future (95%); 90% said they would definitely visit again (higher than the all Wales average of 86%), while 5% would probably visit again (cf. 9% all Wales). These proportions reflect the findings at Barry Island and Cosmeston / Penarth Pier.

Only a very small proportion of visitors (3%) said they were not likely to make another visit to the region – see Figure 5 below.



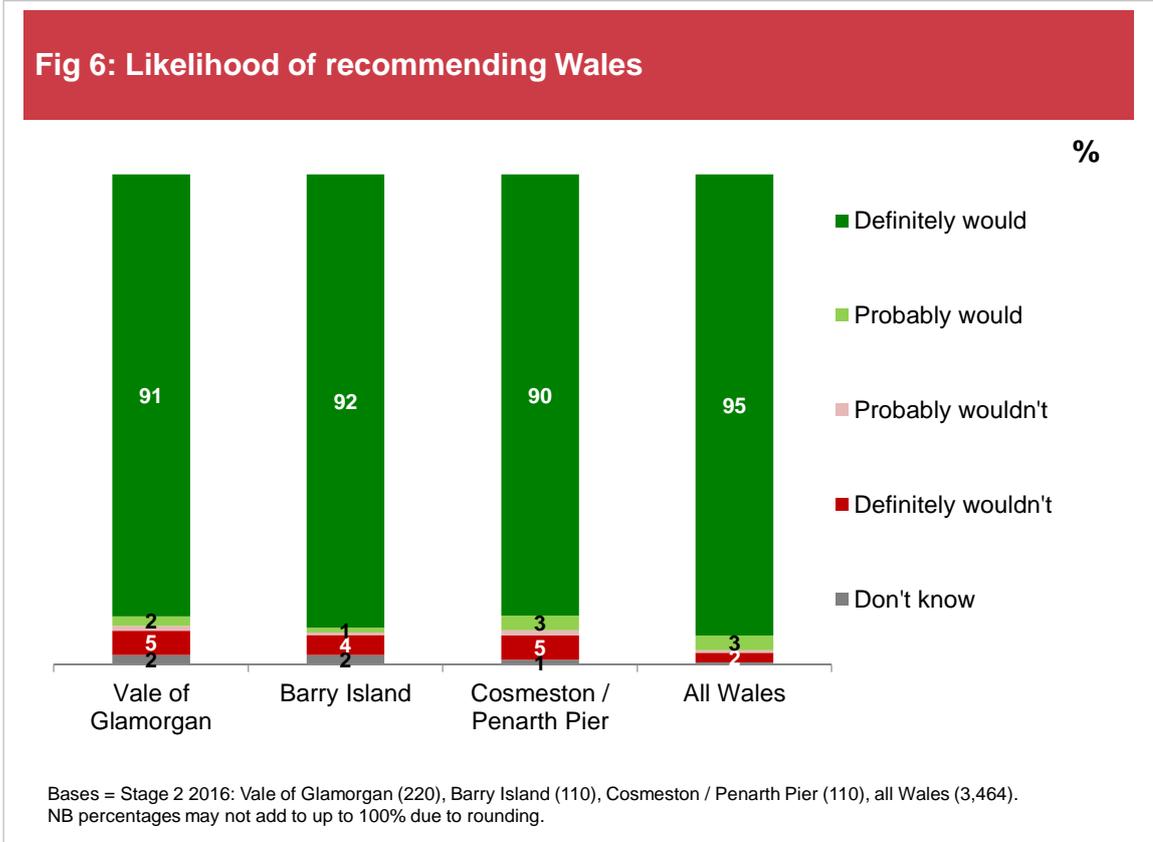
As might be expected, visitors who lived in Wales were most likely to say that they would definitely visit again (93%), although 74% of visitors from the rest of the UK said the same.

Similarly, 93% of repeat visitors said they would definitely visit again. However, 76% 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, over nine in ten visitors to the Vale of Glamorgan said that they would recommend it as a place to visit (93%); 91% would definitely recommend, and 2% would probably recommend the area to friends and family. However, 6% said that they would not recommend Wales as a place to visit.

The findings for the Vale of Glamorgan are, therefore, slightly less positive than was seen across the whole of Wales, where 97% would recommend Wales and only 2% would not – see Figure 6 below.



Visitors to Barry Island were slightly more likely to say they would definitely recommend a visit to others compared to Cosmeston / Penarth Pier (92% cf. 90%). Conversely, a slightly higher proportion of visitors to the latter locations would not recommend the area (6% cf. 4%).

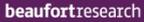
Visitors from Wales were more likely to say they would definitely recommend the area as a place to visit (92%) compared to visitors from the rest of the UK (87%), and repeat visitors were more likely to definitely recommend the area (92%) compared to new visitors (79%).

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	
	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 Barry Island Seafront Big Pit National Mining Museum Bike Park Wales 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 Dare Valley Country Park Festival Park Llancaiach Fawr Manor Millennium Centre / Bay Monmouth Town Centre National Museum Cardiff Newport City Centre Penarth Pier Porthcawl Promenade Rhondda Heritage Park Royal Mint Experience St Fagans National History Museum Tintern Abbey Tredegar House	Monmouthshire County Council South East Wales Tourism Group South East Wales Tourism Group South East Wales Tourism Group Monmouthshire County Council South East Wales Tourism Group South East Wales Tourism Group

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="130 1240 721 1352"> <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) (37)</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
REMINDEE 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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