

Research Report

Wales Visitor Survey 2016

Powys County Council



Prepared for:
Powys County Council

Prepared by:
Beaufort Research



Contact Details

Agency contact: Fiona McAllister/Sarah McDonough/Catrin Davies

Date: January 2017

Beaufort Research

2 Museum Place
Cardiff
CF10 3BG

Tel: (029) 2037 8565

Fax: (029) 2037 0600

E-mail: enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk



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1. Executive summary

1.1 Introduction

This report focuses on **visitors to sites in Powys**; **456** interviews were conducted at Stage 1 and a further **291** were conducted at Stage 2 with visitors to 8 locations in Powys: Brecon town centre, Elan Valley, Powis Castle, Storey Arms, Machynlleth, Lake Vyrnwy, Knighton and Rhayader.

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 proportion of visitors to Powys coming from England, Scotland and Northern Ireland was higher than the proportion of visitors who came from parts of Wales (55% and 42% respectively). Conversely, the majority of visitors to sites across Wales were from Wales but some of the interviewing locations in Powys were quite close to the border with England and so might explain the higher number of English visitors. Only 3% of visitors to the Powys sites were from overseas; however, this is similar to the average across the whole of Wales (only 4% of visitors are from overseas).

Most visitor groups to the Powys sites are either couples or families with young children (35% and 21% respectively). This broadly reflects the All Wales profile, although couples make up a higher proportion of visitors to the area than is the case for Wales overall, while families with young children, in contrast, make up a lower proportion than for Wales overall. The average number of people in each visiting party is 3.5 (2.9 adults and 0.6 children), which is slightly lower than the All Wales average of 3.7 (2.7 adults and 1.0 children).

Three in ten staying visitors to Powys were either first time visitors to Wales or new to this part of Wales (30%), which is slightly lower than the rest of Wales (at 36%). The average number of visits to Wales / this part of Wales was 4.9 in the last 3 years (slightly higher than the All Wales average at 4.2).

Trip profile:

Visitors to Powys are slightly more likely to be on a day trip than visitors to Wales as a whole (at 90% compared to 88% across Wales). The proportion of staying visitors to the area is slightly lower than that of Wales overall (10% compared to 12% overall). Staying visitors stayed an average of 5.8 nights in Wales.

Motivations for visiting and activities undertaken:

Visitors to Powys were most likely to have come to the area to enjoy the landscape / countryside (68%), higher than was the case among visitors to Wales as a whole (56%). This is probably higher across Powys than the All Wales average because of the interviewing locations selected in the county, for example Storey Arms. They were also more likely to mention taking part in outdoor or sporting activities as a reason for visiting (at 41% compared with 25% overall). Again this is because of the high number of interviews achieved at Storey Arms, Elan Valley and Lake Vyrnwy.

The most popular activities undertaken by visitors to Powys were: walking more than 2 miles (32%), visit country parks / forest parks (29%), general sightseeing or visit a wildlife attraction / nature reserve (21% for each). Mentions of walking more than 2 miles and visiting country parks / forest parks were higher than for Wales as a whole again because of Storey Arms, Elan Valley and Lake Vyrnwy.

Satisfaction with the overall experience, revisiting and recommending:

In general, visitors to Powys were highly satisfied with their visit, as over three quarters of visitors to Powys (76%) 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 four in ten visitors to Powys, with 38% saying that their trip was better than expected. Over half felt that their expectations had been met (58%), while only 1% of visitors to the region said that their trip was not as good as expected.

Virtually all visitors to Powys said they were likely to return in future (96%); 86% said they would definitely visit again, while 10% would probably visit again. 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, virtually all visitors to Powys said that they would recommend it as a place to visit (99%).

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 **County of Powys**, at the following locations:

- Brecon town centre
- Elan Valley
- Powis Castle
- Storey Arms
- Machynlleth
- Lake Vyrnwy
- Knighton
- Rhayader

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). **456** interviews were conducted at Stage 1 across **8 locations** within Powys.

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 **219** telephone interviews were conducted with visitors to Powys.

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 Powys

Table 2: Locations	Stage 1 Interviews	Stage 2 Interviews
Brecon town centre	27	17
Elan Valley	71	42
Knighton	15	9
Lake Vyrnwy	71	35
Machynlleth	38	20
Powis Castle	65	31
Rhayader	37	15
Storey Arms	132	50
TOTAL	456	219

4. Research findings

4.1 Visitor profile

The proportion of visitors to Powys coming from England, Scotland and Northern Ireland was higher than the proportion of visitors who came from parts of Wales (55% and 42% respectively). Conversely, the majority of visitors to sites across Wales were from Wales but some of the interviewing locations in Powys were quite close to the border with England and so might explain the higher number of English visitors. Storey Arms had a higher proportion of Welsh visitors (55% compared to 42% overall), while the majority of visitors to Lake Vyrnwy were from England (66%). Only 3% of visitors to the Powys sites were from overseas; however, this is similar to the average across the whole of Wales (only 4% of visitors are from overseas).

The split in the gender of visitors to the Powys sites is skewed more towards male visitors (59% male v 41% female); while on average in Wales overall it was the reverse (44% male v 56% female).

The age profile of visitors to Powys was, on the whole, similar to the average across all the sites in Wales. However, visitors to Powys were slightly younger, as almost a quarter of all the visitors to the sites in Powys were aged 16-34 (24%) compared to 22% on average across Wales and there was a slightly lower proportion of visitors aged 55+ in Powys (36% cf. 38% for Wales overall).

Of note is the high prevalence of ABC1¹ visitors: these make up nearly three quarters of the visitors to Powys (74%), while C2DE visitors account for just a quarter (25%). 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 Powys tend to come from outside Wales.

Reflecting the higher proportion of visitors coming from England, the proportion of visitors to Powys who can speak Welsh is lower (7% cf. 14% on average across 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	Powys %	ALL WALES %
Area of residence		
Wales	42	59
Rest of the UK	55	37
Overseas	3	4
Gender		
Male	59	44
Female	41	56
Age		
16 - 24 years	10	7
25 – 34 years	14	15
35 – 44 years	15	20
45 – 54 years	27	19
55 - 64 years	16	18
65+ years	19	20
Social grade		
AB	28	32
C1	46	36
C2	19	20
DE	6	13
Welsh speaking		
Fluent	2	7
Non-fluent	5	7
Non-Welsh speaker	93	85
Ethnicity		
White Welsh / British	86	89
White other	7	6
Non-white / other	7	4

Bases = Stage 1 2016: All Wales (6,652); Powys (456).

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

Most visitor groups to the Powys sites are either couples or families with young children (35% and 21% respectively). This broadly reflects the All Wales profile, although couples make up a higher proportion of visitors to the area than is the case for Wales overall, while families with young children, in contrast, make up a lower proportion than for Wales overall. A further 17% are visiting with friends (higher than for Wales as a whole), while 7% visit alone. The average number of people in each visiting party is 3.5 (2.9 adults and 0.6 children), which is slightly lower than the All Wales average of 3.7 (2.7 adults and 1.0 children).

Three in ten staying visitors to Powys were either first time visitors to Wales or new to this part of Wales (30%), which is slightly lower than the rest of Wales (at

36%). The average number of visits to Wales / this part of Wales was 4.9 in the last 3 years (slightly higher than the All Wales average at 4.2).

However, day visitors were much more likely to be frequent visitors, having taken on average 10.8 visits to Wales / this part of Wales in the last year. However, this is slightly lower than the average across Wales (13.1) – see Table 4 below.

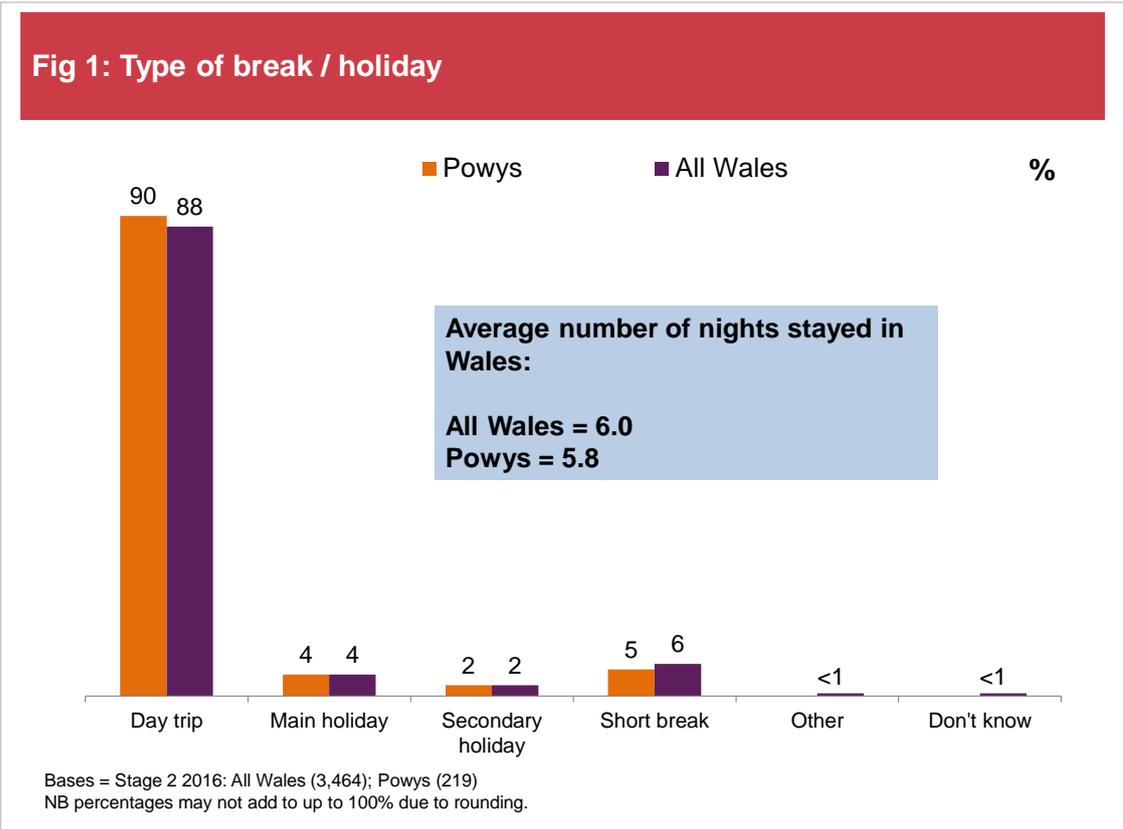
Table 4: Group type and frequency of visiting	Powys %	ALL WALES %
Type of visiting party		
Couple	35	28
Family with young children	21	32
Friends	17	12
Family with older children	8	5
Visiting alone	7	8
Family without children	7	7
Organised group / society	3	2
Family with younger and older children	1	3
Other	1	1
Refused	<1	1
Average size of party		
Average number of adults	2.9	2.7
Average number of children	0.6	1.0
Average total number of people	3.5	3.7
Frequency of visiting in last three years (Staying visitors)		
Stage 2 bases in brackets	(Base =135)	(Base = 1,937)
Once	30	36
2 – 3 times	31	29
4 – 6 times	16	16
7 – 10 times	7	6
More than 10 times	16	12
Don't know	-	<1
AVERAGE	4.9	4.2
Frequency of visiting in last year (Day visitors)		
Stage 2 bases in brackets	(Base = 84)	(Base = 1,527)
Once	13	13
2 – 3 times	19	12
4 – 6 times	15	15
7 – 10 times	10	10
11 – 20 times	19	13
More than 20 times	23	35
Don't know	1	2
AVERAGE	10.8	13.1

*Bases = Stage 1 2016: All Wales (6,652); Powys (456) Stage 2 2016: All Wales (3,464); Powys (219)
NB percentages may not add to up to 100% due to rounding.*

4.2 Trip profile

The vast majority of visitors to Powys were on a day trip when interviewed (90%); this was higher than the All Wales average of 88%. Over half of the day visitors lived in Wales (52%), while a slightly lower proportion (45%) of day visitors to Powys came from England, Scotland and Northern Ireland (England mainly). Only 3% of day visitors lived abroad.

The remaining 10% of visitors to Powys were staying in Wales, most commonly on a short break (5%). The proportion of staying visitors interviewed in Powys was slightly lower than among visitors to Wales as a whole (12%). In addition, visitors were staying in Powys for slightly short than across Wales as the average number of nights stayed in Powys was 5.8 (cf. 6.0 across Wales) – see Figure 1 below.

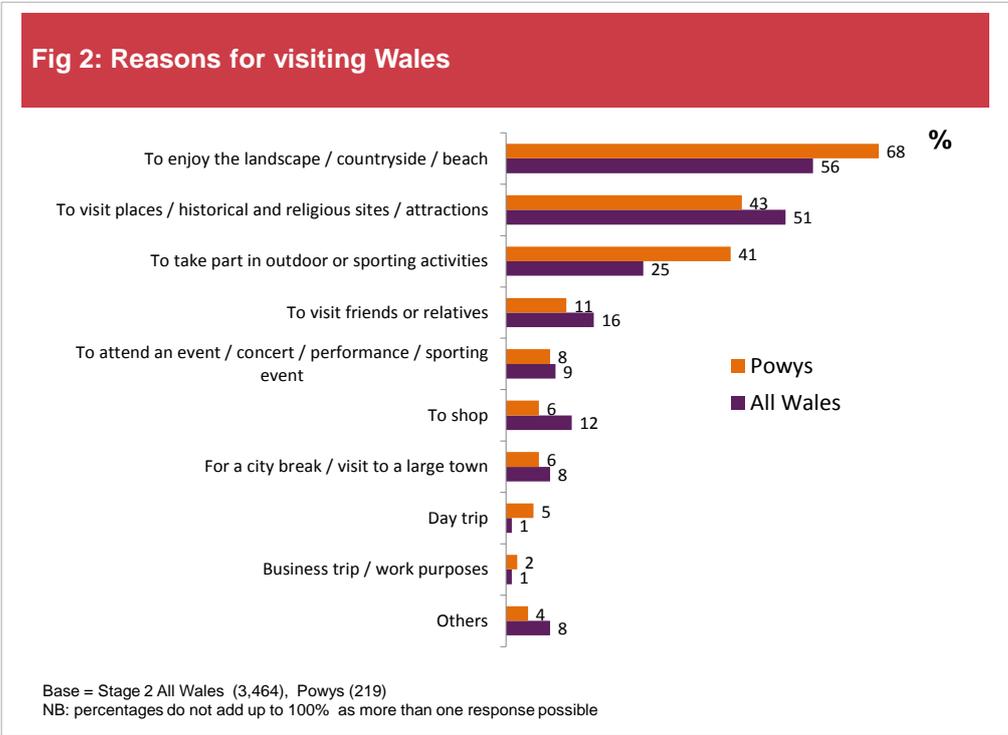


4.3 Motivations for visiting and activities undertaken

4.3.1 Reasons for visiting

Visitors to Powys were most likely to have come to the area to enjoy the landscape / countryside (68%), higher than was the case among visitors to Wales as a whole (56%). This is probably higher across Powys than the All Wales average because of the interviewing locations selected in the county, for example Story Arms. They were also more likely to mention taking part in outdoor or sporting activities as a reason for visiting (at 41% compared with 25% overall). Again this is because of the high number of interviews achieved at Storey Arms, Elan Valley and Lake Vyrnwy.

Conversely, Powys visitors were slightly less likely to say they had come to visit places/ historical religious attractions than was the case for Wales overall (43% of Powys visitors compared with 51% overall), visit friends or family (11% cf. 16% across all of Wales) or to shop (mentioned by 6% of Powys visitors compared with 12% 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 in Powys, the walking more than 2 miles (32%), visit country parks / forest parks (29%), general sightseeing or visit a wildlife attraction / nature reserve (21% for each). Mentions of walking more than 2 miles and visiting country parks / forest

parks were higher than for Wales as a whole again because of Storey Arms, Elan Valley and Lake Vyrnwy.

Almost a fifth of visitors (18%) said they had visited a castle or other historic attraction, which is due to the fact that Powis Castle was one of the interviewing locations in the survey. Despite this, the proportion of visitors saying they had been to a castle or other historic attraction is slightly lower than the All Wales average (18% cf. 24% overall across Wales).

Therefore, the most popular individual activities undertaken by visitors to Powys 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	Powys %	ALL WALES %
Walking more than 2 miles	32	14
Visit country parks / forest parks	29	22
General sightseeing	21	27
Visit a wildlife attraction / nature reserve	21	10
Castle or other historic attraction	18	24
Visit a nature-based attraction	15	13
Visit the beach	14	23
Visit a museum or heritage centre	13	19
Wildlife watching	13	7
Visit gardens	9	14
Walking less than 2 miles	8	6
Visit a religious site	6	7
Cycling	6	3
Visiting a scenic / steam / historic railway	5	5

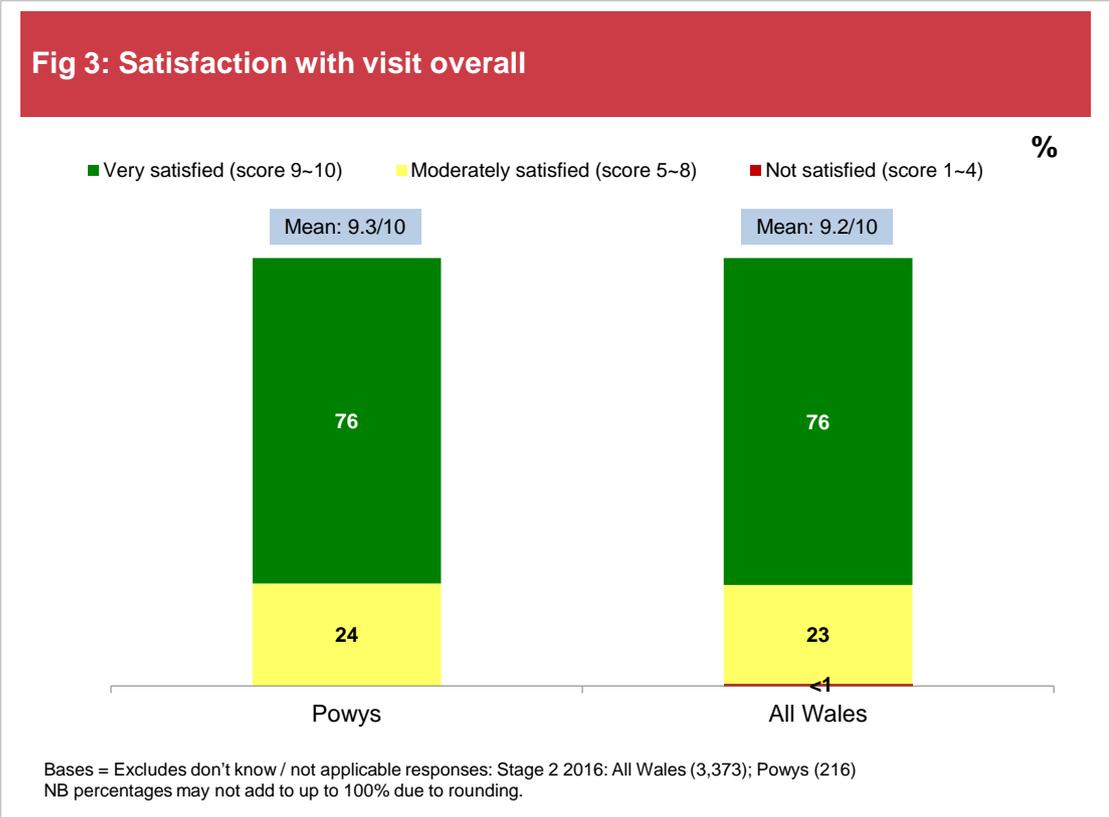
Bases = Stage 2 2016: All Wales (3,464); Powys (219)

4.4 Satisfaction with overall experience, revisiting and recommending

4.4.1 Satisfaction with Wales as a place to visit

Visitors to Powys 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 three quarters of visitors to Powys (76%) 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 24% gave more moderate scores of between 5 to 8 / 10, but none of the visitors to any of the sites in Powys were dissatisfied with their visit – see Figure 3 below.

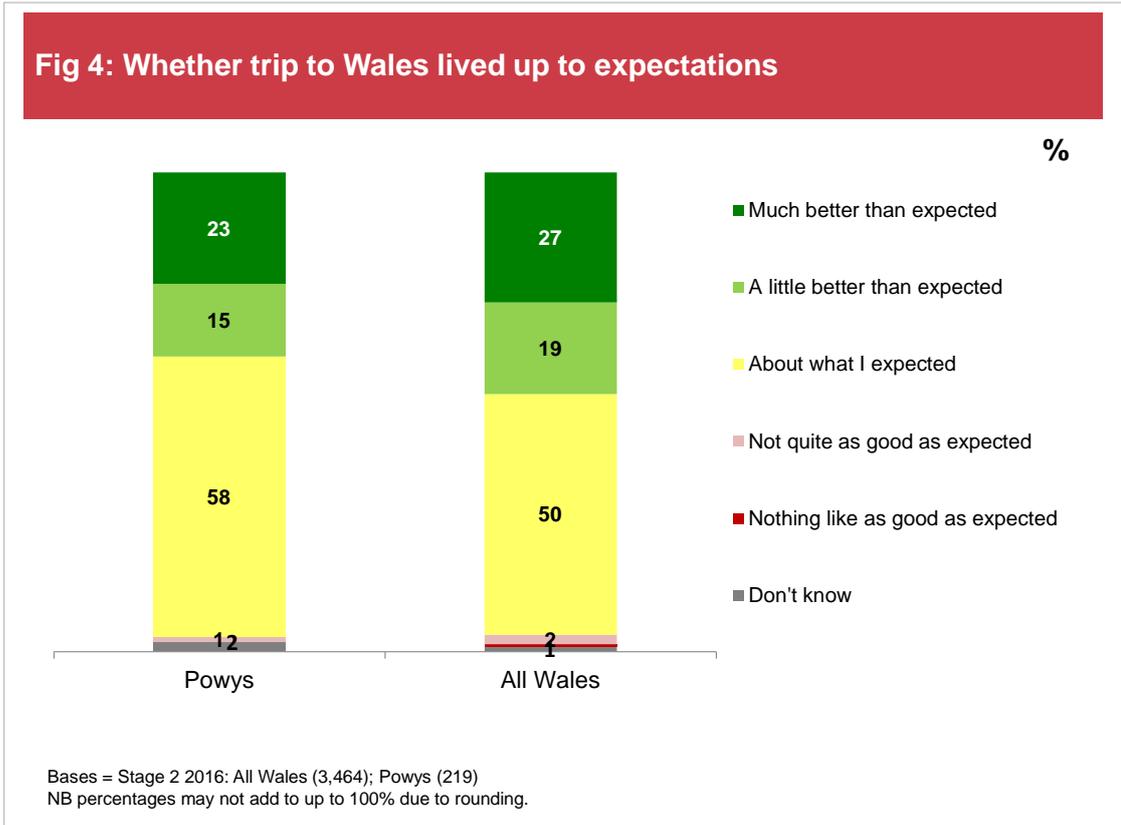


Repeat visitors were most likely to be very satisfied as over eight in ten visitors gave a score of 9 or 10 / 10 (80%). However, almost two thirds of New and Lapsed visitors also gave high scores of 9 or 10/10 (64% and 63% respectively).

4.4.2 Expectations

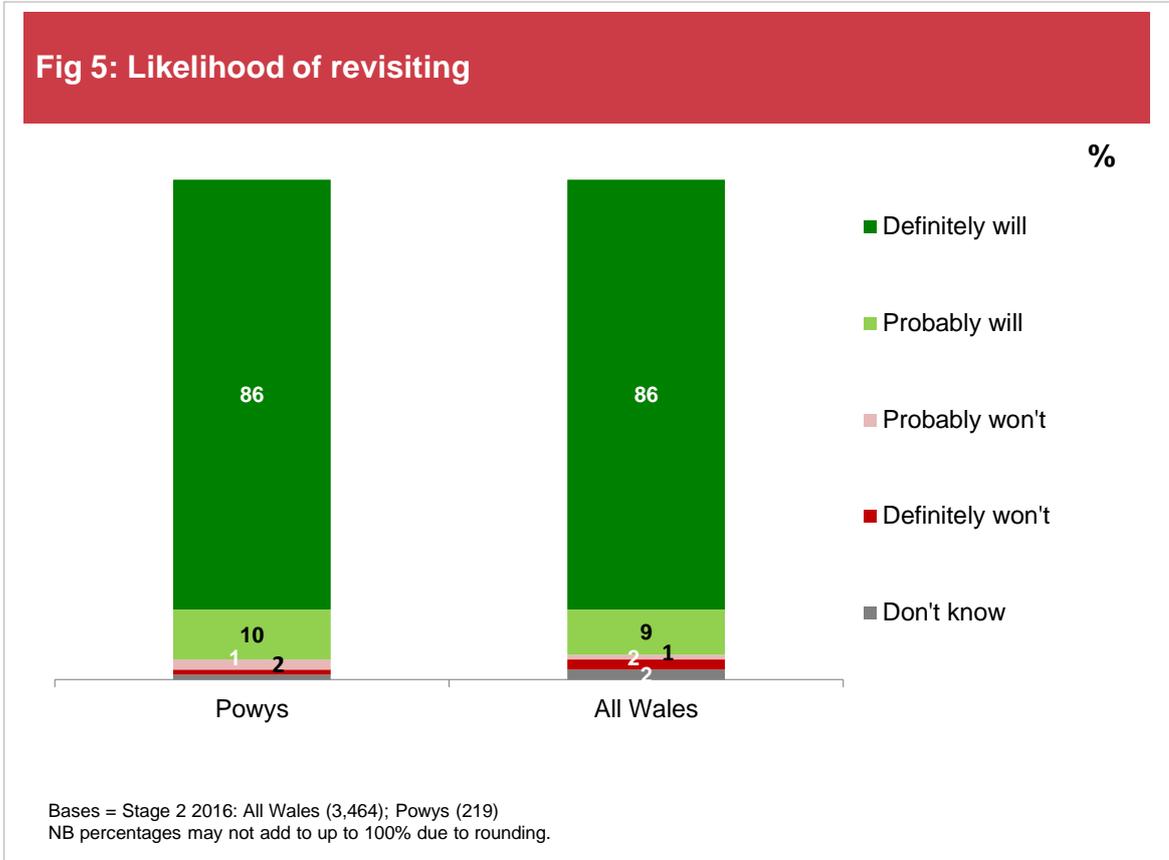
Wales exceeded expectations for almost four in ten visitors to Powys, with 38% saying that their trip was better than expected. Over half felt that their expectations had been met (58%); this rose to 71% amongst visitors to from other countries in the UK (mainly England). Only 1% of visitors to the region said that their trip was not as good as expected.

Expectations about their trip amongst visitors to Powys generally mirrored those of visitors across the whole of Wales, but slightly fewer said it was much better than expected in Powys (23% compared to 27% across Wales)- see Figure 4 below.



4.4.3 Returning to Wales in future

Virtually all visitors to Powys said they were likely to return in future (96%); 86% said they would definitely visit again, while 10% would probably visit again. These proportions reflect similar findings across the whole of Wales. Only a very small proportion of visitors (3%) said they were not likely to make another visit to the region – see Figure 5 below.



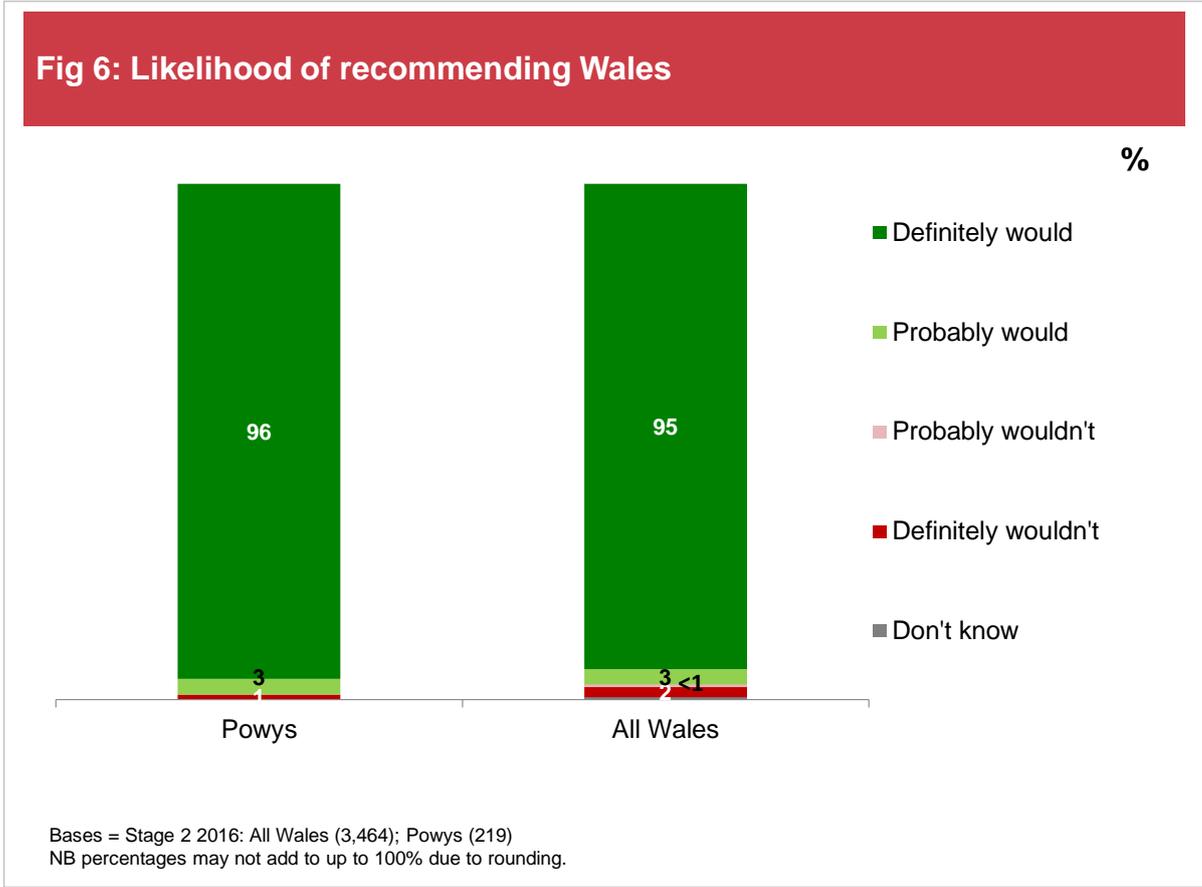
The majority of visitors who lived in Wales said that they would definitely visit again (87%), but a higher proportion of visitors from England, Scotland and Northern Ireland said the same (97%).

As might be expected, 90% of repeat visitors said they would definitely visit again. However, 70% 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 Powys said that they would recommend Wales as a place to visit (99%); 96% would definitely recommend, and 3% would probably recommend the country to friends and family. Only 1% said that they would not recommend Wales as a place to visit.

Again, the findings for Powys are very similar to those for the whole of Wales – see Figure 6 below.



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="132 1240 722 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.

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