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# Research Report

Wales Visitor Survey 2019

Gwynedd Council



Prepared for:  
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# 1. Executive summary

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## 1.1 Introduction

This report focuses on **visitors within the Gwynedd unitary authority area**. **667** interviews were conducted at Stage 1 and a further **345** were conducted at Stage 2 with visitors to the Gwynedd county area.

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

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

## 1.2 Key findings

### *Visitor profile:*

A little under half of visitors to Gwynedd are from Wales (46%) with exactly half (50%) visiting from elsewhere in the UK and a further 4% originating overseas. This is somewhat different to the picture across Wales on average, where the majority, 69%, are visiting from within in Wales whilst just 31% are visiting from outside of Wales (27% UK, 4% abroad).

The gender split of visitors to Gwynedd is skewed towards females at 58% with 42% of visitors therefore being male. This is very similar to visitors across Wales as a whole, where the split is 61% female and 39% male.

Overall, the age profile of Gwynedd visitors broadly matches that of all Wales visitors with 21% being under 35 (cf. 24% across Wales on average), 46% being 35-54 (cf. 39% across all Wales) and the remaining third (33%), being aged over 55 (cf. 37% across all Wales) – see Table 2 for full details.

Most visitors are in socio-economic groups ABC1\* (75%) whilst just a quarter (25%) are in C2DE\* which is similar to the all Wales visitor average of 70% ABC1, 30% C2DE, although Gwynedd visitors are slightly more upmarket than average, with 43% falling within the AB category compared with 35% across Wales on average.

*\*ABC1: professional and other non-manual occupations,*

*\*\*C2DE: manual occupations, semi and unskilled workers, non-working and state-pension-only retired.*

The ethnic origin profile of visitors to Gwynedd is very similar to the all Wales visitor average with the vast majority of visitors identifying as white British/Welsh (89% Gwynedd, 90% all Wales). Just 6% of Gwynedd visitors were from “white – other” (cf. 7% across all Wales visitors) and 5% identified as “non-white” (cf. 3% across all Wales visitors).

In terms of group make-up, like the all-Wales visitor average, most visitor groups to Gwynedd are either couples (29%) or family groups with young children (24%). There was a slightly higher proportion of family groups with older children visiting Gwynedd than average across Wales (19% of Gwynedd visitors had older children or a combination of older and younger, compared with 12% across all Wales). There were fewer Gwynedd visitors visiting alone than average (6% Gwynedd cf. 11% all Wales).

The average number of people in each visiting party is 4.3 (3.4 adults and 0.9 children), which is slightly higher than the all Wales average of 3.7 (2.8 adults and 0.9 children) and matches the group profile mentioned above, of fewer solo visitors to Gwynedd than average.

### ***Trip profile:***

Whilst the majority of visitors to Gwynedd were on a day trip (72%) this is a much lower proportion than across Wales on average, where 89% were on day trips. Staying visitors therefore account for a much higher proportion of Gwynedd visitors than average: 27% cf. 11%.

Of the Gwynedd visitors who were staying overnight (27% of the total sample), most were on a short break (13%), with 8% on their main annual holiday and 6% on a secondary/additional holiday.

Gwynedd attracts a high proportion of repeat staying visitors with almost two-thirds having visited the area more than once in the last three years (63%); over one in ten (13%) had visited over ten times in this time period. Across Wales on average, 70% of staying visitors were repeat visitors and 16% had visited over 10 times in the last three years.

Similarly, most of the day visitors to Gwynedd had been more than once in the last year (86%) including over four in ten (41%) who had been more than 20 times in

this time frame. This is very similar to across Wales on average: 91% of day visitors had been before including 42% who had visited an area more than 20 times.

### ***Motivations for visiting and activities undertaken:***

Visitors to Gwynedd were most likely to have come to the area to enjoy the landscape, countryside and beaches (63%), slightly more so than visitors to Wales as a whole (55%). The second main reason for visiting Gwynedd was to take part in outdoor or sporting activities, and this was mentioned by almost double the number of Gwynedd visitors than average across Wales (58% cf. 31%). The third most often cited reason for visiting Gwynedd was to visit historical/religious places and attractions, and at 39% this was very similar to the all Wales average (36%).

Looking at the specific activities undertaken by Gwynedd visitors shows the most popular activity was walking for more than two miles which 37% of Gwynedd visitors had taken part in, almost double the all Wales average of 19%. This was closely followed by visiting country/forest parks (33%), general sightseeing (29%) and visiting the beach (28%), all fairly similar/marginally more popular in Gwynedd than across Wales on average. Visiting a steam/scenic railway was much more likely to have been done in Gwynedd (15%) than average across Wales (4%).

Other notable differences in Gwynedd to Wales tended to be in taking part in active or adventurous sporting activities: 16% had taken part in mountain biking (cf. 3% across Wales on average), 12% had done adventure sports (cf. 2% all Wales), 10% had been swimming (3% all Wales) and 9% had been cycling (3% all Wales).

### ***Satisfaction with the overall experience, revisiting and recommending:***

In general, visitors to Gwynedd were highly satisfied with their visit: on a scale of 1 to 10, where 1 was 'very dissatisfied' and 10 was 'very satisfied', eight in ten visitors to Gwynedd (80%) gave a score of either 9 or 10 out of 10 for Wales overall as a place to visit with an average score was 9.3 out of 10 (identical to the all Wales mean score).

Their trip to or within Wales exceeded expectations for over half the Gwynedd visitors (51%) including 28% who said it was "much better" than expected. Just under half felt that the trip was "as" expected (49%) and only one visitor to the region said that their trip was "not quite as good" as expected (less than 1%). No-one said the trip was "nothing like as good" as expected. Overall, more Gwynedd visitors than average across Wales found their trip to have been better than anticipated: 51% cf. 41%.

Virtually all visitors to Gwynedd said they were likely to return in future (97%); 88% said they would *definitely* visit again while 8% would *probably* visit again (very similar to the all Wales average, 90% definitely, 7% probably).

Reflecting the high levels of visitor satisfaction and strong likelihood of returning to Wales in future, almost all visitors to Gwynedd said that they would recommend it as a place to visit (98%); 97% would definitely recommend, and 1% would probably recommend Wales to friends and family.

## Aims and objectives

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

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

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

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

This summary report focuses on interviews conducted within the Gwynedd county area.

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



## 2. Methodology

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### 3.1 Overview of approach

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

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

Interviews were conducted with adults aged 16+ who were on a non-routine trip to the area (day trip or staying visitor). General demographic information such as age, gender, social grade, 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). **667** interviews were conducted at Stage 1 across five sites in the Gwynedd unitary authority area.

#### 2. Stage 2: Follow-up telephone survey:

A longer, more in-depth interview was conducted by telephone with a sample of visitors interviewed at Stage 1, after their visit ended. This gathered feedback, post-visit, on their experience as a whole, including perceptions of Wales as a tourism destination, likelihood to revisit and whether they would recommend Wales to friends and relatives. A total of **345** telephone interviews were conducted with visitors to Gwynedd at Stage 2 of the survey.

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

Fieldwork took place between 4 May and 22 November 2019.

### 3.2 Samples achieved at Stages 1 and 2 in Gwynedd

Table 1: Locations	Stage 1 Interviews	Stage 2 Interviews
Caernarfon town centre	142	78
Coed y Brenin	173	107
Llanberis	123	49
Porthmadog town centre	84	45
Zip World / Llechwedd	145	66
<b>TOTAL Gwynedd Interviews</b>	<b>667</b>	<b>345</b>

### 3. Research findings

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#### 4.1 Visitor profile

A little under half of visitors to Gwynedd are from Wales (46%) with exactly half visiting from elsewhere in the UK (50%) and a further 4% originating overseas. This is somewhat different to the picture across Wales on average, where the majority, 69%, are visiting from within in Wales whilst just 31% are visiting from outside of Wales (27% UK, 4% abroad).

The gender split of visitors to Gwynedd is skewed towards females at 58% with 42% of visitors therefore being male. This is very similar to visitors across Wales as a whole, where the split is 61% female and 39% male.

Overall, the age profile of Gwynedd visitors broadly matches that of all Wales visitors with 21% being under 35 (cf. 24% across Wales on average), 46% being 35-54 (cf. 39% across all Wales) and the remaining third (33%), being aged over 55 (cf. 37% across all Wales) – see Table 2 for full details.

Most visitors are in socio-economic groups ABC1<sup>1</sup> (75%) whilst just a quarter (25%) are in C2DE<sup>2</sup> which is similar to the all Wales visitor average of 70% ABC1, 30% C2DE, although Gwynedd visitors are slightly more upmarket than average, with 43% falling within the AB category compared with 35% across Wales on average – see breakdown in Table 2.

The ethnic origin profile of visitors to Gwynedd is very similar to the all Wales visitor average with the vast majority of visitors identifying as white British/Welsh (89% Gwynedd, 90% all Wales). Just 6% of Gwynedd visitors were from “white – other” (cf. 7% across all Wales visitors) and 5% identified as “non-white” (cf. 3% across all Wales visitors).

In-line with visitors across the rest of the country, very few visitors to Gwynedd could speak Welsh (12% fluent, 10% not fluent) and with more visitors from elsewhere in the UK than from within Wales, this is understandably even lower than across Wales on average: 78% of Gwynedd visitors have no Welsh compared with 81% of visitors across Wales as a whole.

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<sup>1</sup> ABC1: professional and other non-manual occupations

<sup>2</sup> C2DE: manual occupations, semi and unskilled workers, non-working and state-pension-only retired

<b>Table 2: Demographic profile of visitors</b>	<b>Gwynedd Visitors %</b>	<b>ALL WALES %</b>
<b>Area of residence</b>		
Wales	46	69
Rest of the UK	50	27
Overseas	4	4
<b>Gender</b>		
Male	42	39
Female	58	61
<b>Age</b>		
16 - 24 years	3	7
25 – 34 years	18	17
35 – 44 years	22	20
45 – 54 years	24	19
55 - 64 years	18	16
65+ years	15	21
<b>Social grade</b>		
AB	43	35
C1	32	35
C2	16	18
DE	10	11
<b>Welsh speaking</b>		
Fluent	12	9
Non-fluent	10	10
Non-Welsh speaker	78	81
<b>Ethnicity</b>		
White Welsh / British	89	90
White other	6	7
Non-white / other	5	3

*Bases = Stage 1 2019: Gwynedd total (667), all Wales (7,683).  
NB percentages may not add to up to 100% due to rounding.*

In terms of group make-up, like the all-Wales visitor average, most visitor groups to Gwynedd are either couples (29%) or family groups with young children (24%). There was a slightly higher proportion of family groups with older children visiting than average across Wales (19% of Gwynedd visitors had older children or a combination of older and younger, compared with 12% across all Wales). There were fewer Gwynedd visitors visiting alone than average (6% Gwynedd cf. 11% all Wales) - see Table 3 overleaf for full details.

The average number of people in each visiting party is 4.3 (3.4 adults and 0.9 children), which is, given the higher proportion of family and non-solo visitors, understandably higher than the all Wales average of 3.7 (2.8 adults and 0.9 children).

Gwynedd attracts a high proportion of repeat staying visitors with almost two-thirds having visited the area more than once in the last three years (63%); over one in ten (13%) had visited over ten times in this time period. Across Wales on average,

70% of staying visitors were repeat visitors and 16% had visited over 10 times in the last three years.

Similarly, most of the day visitors to Gwynedd had been more than once in the last year (86%) including over four in ten (41%) who had been more than 20 times in this time frame. This is very similar to across Wales on average: 91% of day visitors had been before including 42% who had visited an area more than 20 times in the last year - see Table 3:

<b>Table 3: Group type and frequency of visiting</b>	<b>Gwynedd %</b>	<b>ALL WALES %</b>
<b>Type of visiting party</b>		
Alone	6	11
Couple	29	27
Family – young children	24	28
Family – older children	12	8
Family – young and old children	7	4
Family – no children	5	8
Friends	14	11
Organised group	3	2
Other	-	<1
Refused	-	1
<b>Average size of party</b>		
Average number of adults	3.4	2.8
Average number of children	0.9	0.9
Average total number of people	4.3	3.7
<b>Frequency of visiting in last three years (staying visitors)</b>		
Stage 2 bases in brackets	(Base =301)	(Base = 1,880)
Once	37	30
2 – 3 times	29	28
4 – 6 times	18	20
7 – 10 times	4	6
More than 10 times	13	16
Don't know	-	<1
<b>Frequency of visiting in last year (day visitors)</b>		
Stage 2 bases in brackets	(Base =44)	(Base = 2,029)
Once	14	9
2 – 3 times	16	11
4 – 6 times	9	13
7 – 10 times	7	10
11 – 20 times	14	14
More than 20 times	41	42
Don't know	-	1

Bases = Stage 1 2019: Gwynedd (667), all Wales (7,683).

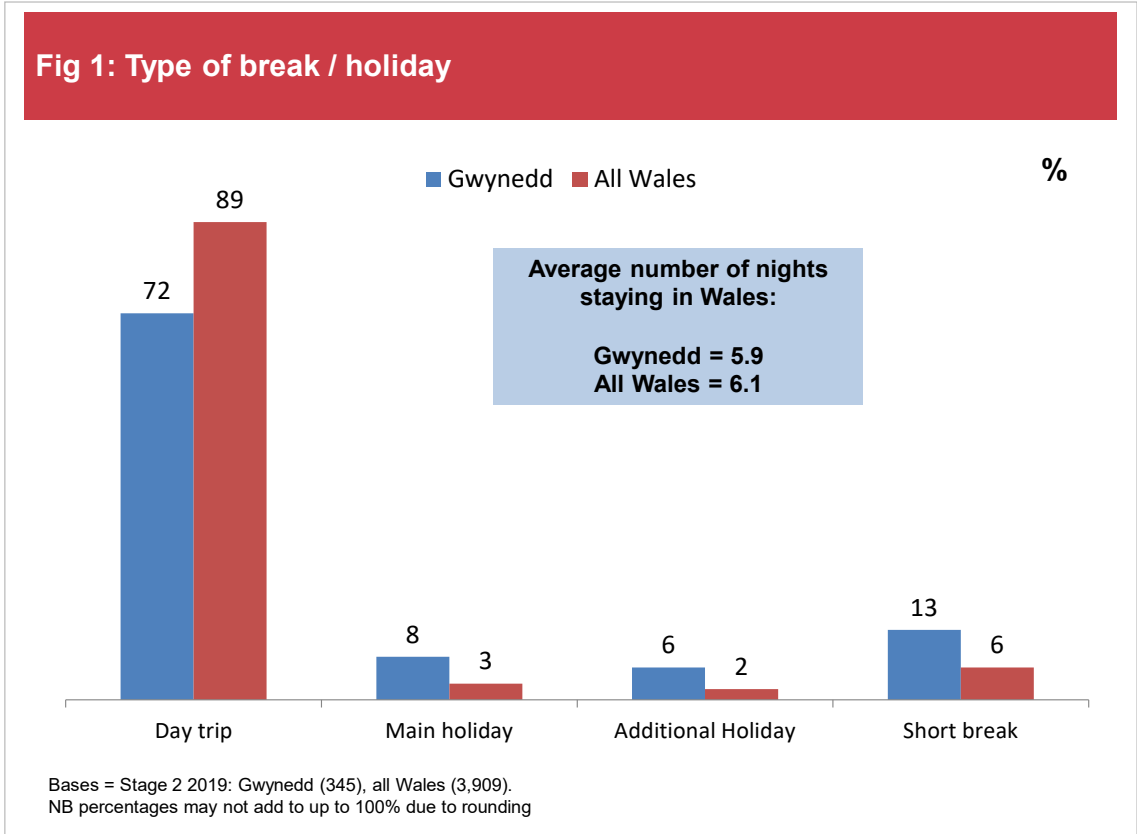
NB percentages may not add to up to 100% due to rounding. *Small base sizes in red*

## 4.2 Trip profile

Whilst the majority of visitors to Gwynedd were on a day trip (72%) this is a much lower proportion than across Wales on average, where 89% were on day trips. Staying visitors therefore account for a much higher proportion of Gwynedd visitors than average: 27% cf. 11%.

Of the Gwynedd visitors who were staying overnight (27% of the total sample), most were on a short break (13%), with 8% on their main annual holiday and 6% on a secondary/additional holiday.

Although the proportion of staying visitors interviewed in Gwynedd was much higher than among visitors to Wales as a whole, the average number of nights stayed was very similar, 5.9 nights in Gwynedd compared with 6.1 nights on average across all Wales. See Figure 1 below:

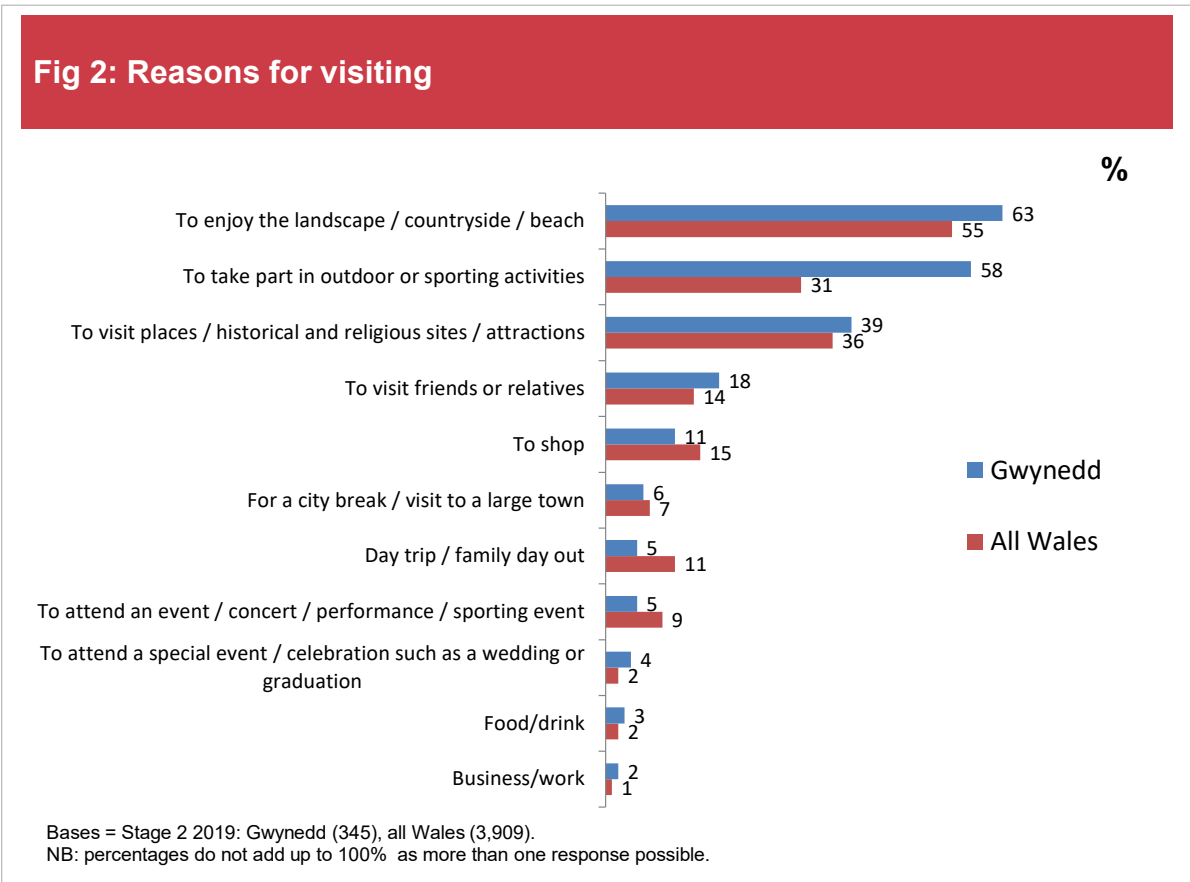


### 4.3 Motivations for visiting and activities undertaken

#### 4.3.1 Reasons for visiting

Visitors to Gwynedd were most likely to have come to the area to enjoy the landscape, countryside and beaches (63%), slightly more so than visitors to Wales as a whole (55%). The second main reason for visiting Gwynedd was to take part in outdoor or sporting activities, and this was mentioned by almost double the number of Gwynedd visitors than average across Wales (58% cf. 31%). The third most often cited reason for visiting Gwynedd was to visit historical/religious places and attractions, and at 39% this was very similar to the all Wales average (36%).

See Figure 2 below for the most often mentioned reasons for visiting mentioned, in order of popularity amongst Gwynedd visitors:



#### 4.3.2 Main activities undertaken while in Gwynedd

Looking in more detail at the specific activities undertaken by visitors interviewed in Gwynedd the most popular activity was walking more than two miles which 37% of Gwynedd visitors had taken part in, almost double the all Wales average of 19%. This was closely followed by visiting country/forest parks (33%), general sightseeing (29%) and visiting the beach (28%) which were all fairly similar/marginally more popular in Gwynedd than across Wales on average. Visiting a steam/scenic railway was much more likely to have been done in Gwynedd (15%) than average across Wales (4%).

Other notable differences in Gwynedd to Wales tended to be in taking part in active or adventurous sporting activities: 16% had taken part in mountain biking (cf. 3% across Wales on average), 12% had done adventure sports (cf. 2% all Wales), 10% had been swimming (3% all Wales) and 9% had been cycling (3% all Wales).

See Table 4 for further details of the main activities undertaken, ordered by popularity in Gwynedd:

<b>Table 4: Most popular individual activities undertaken</b>	<b>Gwynedd %</b>	<b>ALL WALES %</b>
Walking (more than 2 miles)	37	19
Visit country parks / forest parks	33	23
General sightseeing	29	23
Visit the beach	28	22
Wildlife watching	18	13
Visit a castle or other historic attraction	17	16
Mountain biking	16	3
Scenic/steam/historic railway	15	4
Nature based attraction	13	11
Museum or heritage centre	13	11
Adventure sports	12	2
Visit a wildlife attraction / nature reserve	10	11
Walking (less than 2 miles)	10	8
Swimming	10	3
Cycling	9	3
Visit gardens	8	13
Industrial heritage attraction	8	5
Specific attraction (castle, museum, zoo..)	7	1

*Bases = Stage 2 2019: Gwynedd (345), all Wales (3,909).*

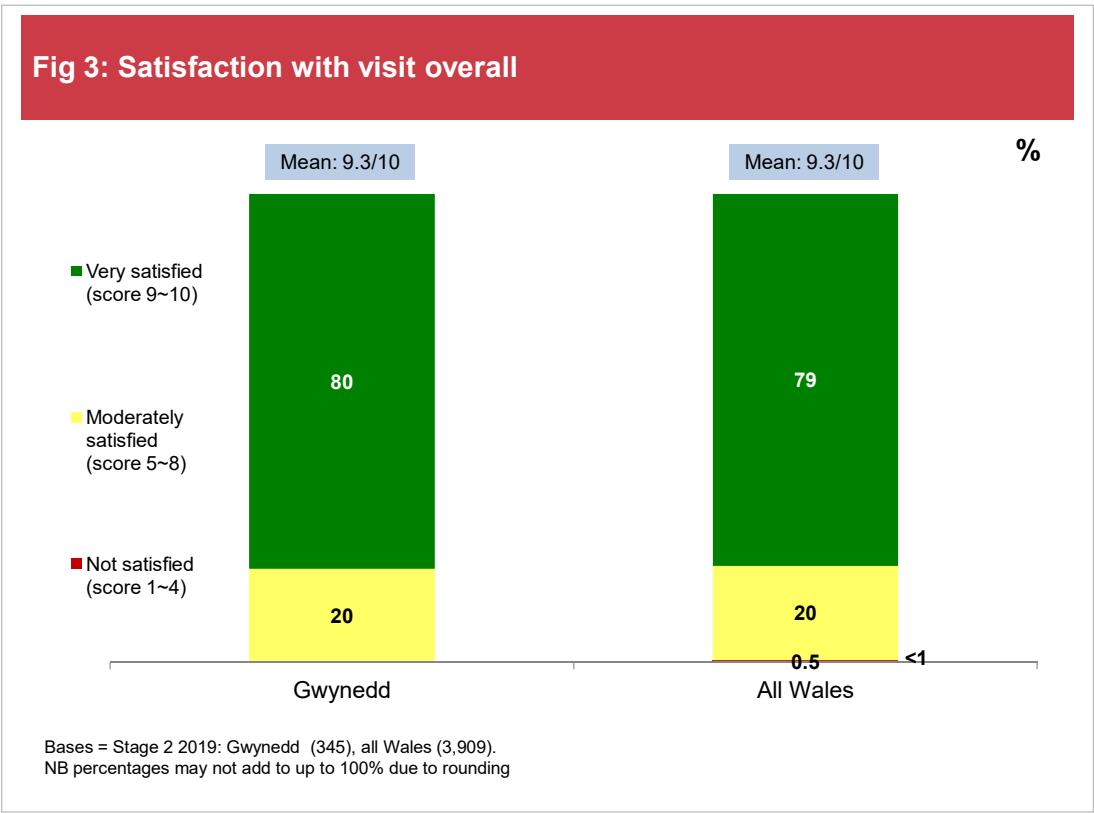
*NB percentages do not add to up to 100% as more than one response possible.*

## 4.4 Satisfaction with overall experience, revisiting and recommending

### 4.4.1 Satisfaction with Wales as a place to visit

In general, visitors to Gwynedd were highly satisfied with their visit: on a scale of 1 to 10, where 1 was 'very dissatisfied' and 10 was 'very satisfied', eight in ten visitors to Gwynedd (80%) gave a score of either 9 or 10 out of 10 for *Wales overall as a place to visit* with an average score was 9.3 out of 10 (identical to the all Wales mean score).

A further one-in-five (20% gave more moderate scores of between 5 to 8 out of 10, but no-one in Gwynedd was actively dissatisfied with their visit – see Figure 3 below:



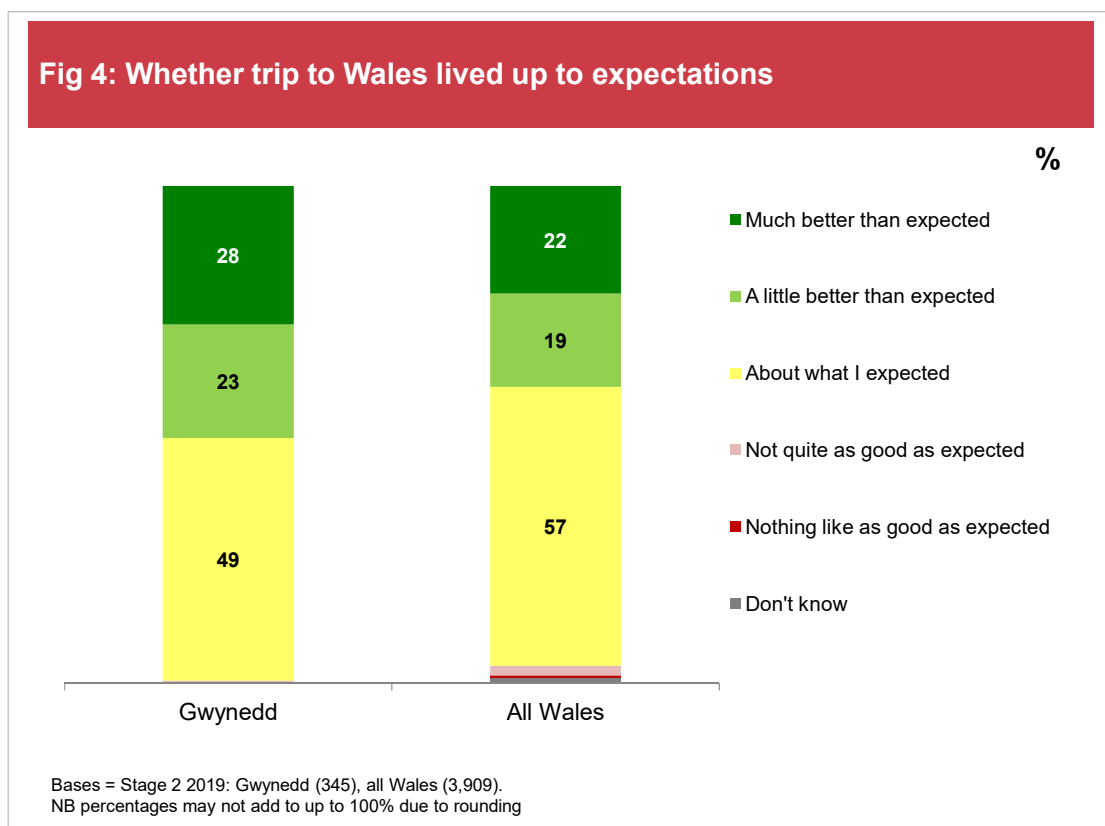
All the demographic sub groups looked at in the survey were satisfied with Wales overall, with none having an average score below 9 out of 10.



#### 4.4.2 Expectations

Their trip to or within Wales exceeded expectations for over half the Gwynedd visitors (51%) including 28% who said it was “much better” than expected. Just under half felt that the trip was “as” expected (49%) and only one visitor to the region said that their trip was “not quite as good” as expected (less than 1%). No-one said the trip was “nothing like as good” as expected.

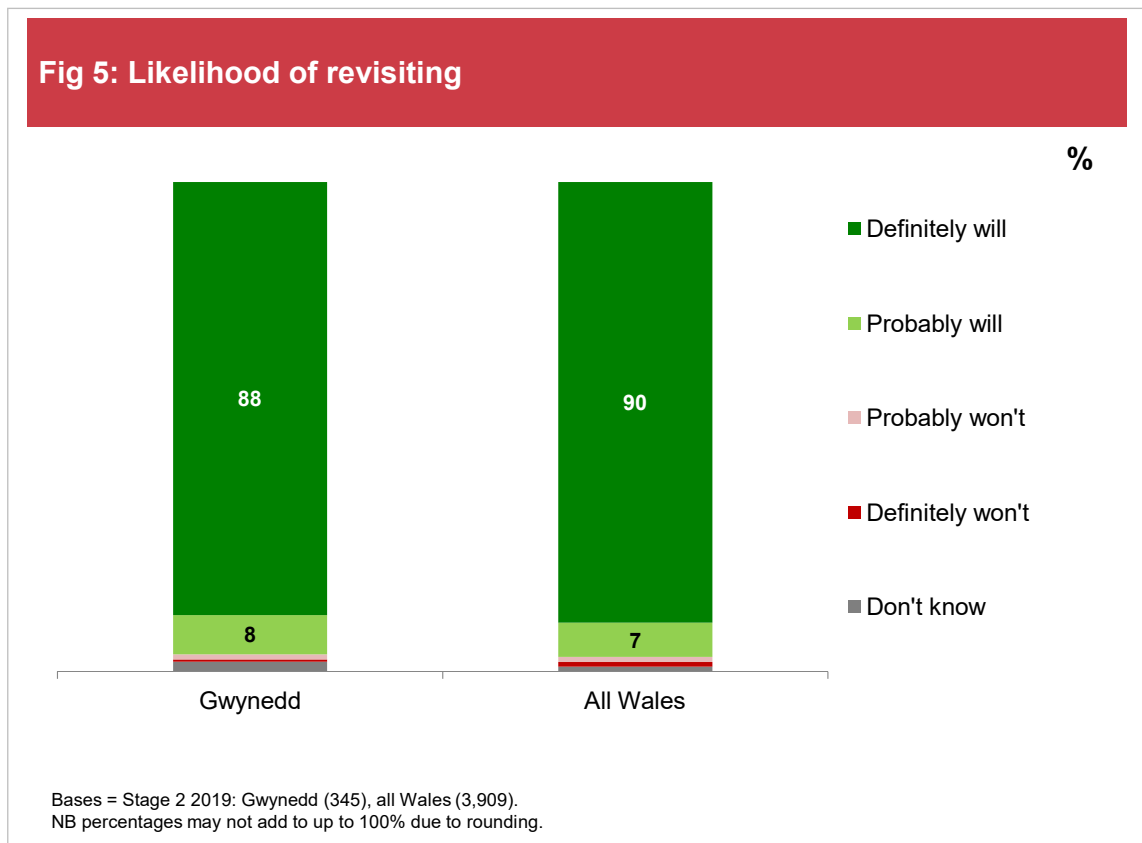
Comparing results for Gwynedd with Wales as a whole, more Gwynedd visitors than average found their trip to have been better than anticipated, 51% cf. 41%. Gwynedd visitors were both more likely to say it was “much better” than expected (28% cf. 22%) and “a little better” (23% cf. 19%). On average, visitors to Wales were more likely to find it ‘as expected’ (57%), compared with visitors to Gwynedd (49%) - see Figure 4 below:



#### 4.4.3 Returning to Wales in future

Virtually all visitors to Gwynedd said they were likely to return in future (97%); 88% said they would *definitely* visit again (very similar to the all Wales average, 90%), while 8% would *probably* visit again (cf. 7% all Wales).

Only a very small proportion of visitors (1%) said they were not likely to make another visit to the region, with the remaining few visitors saying “don’t know” – see Figure 5 below:



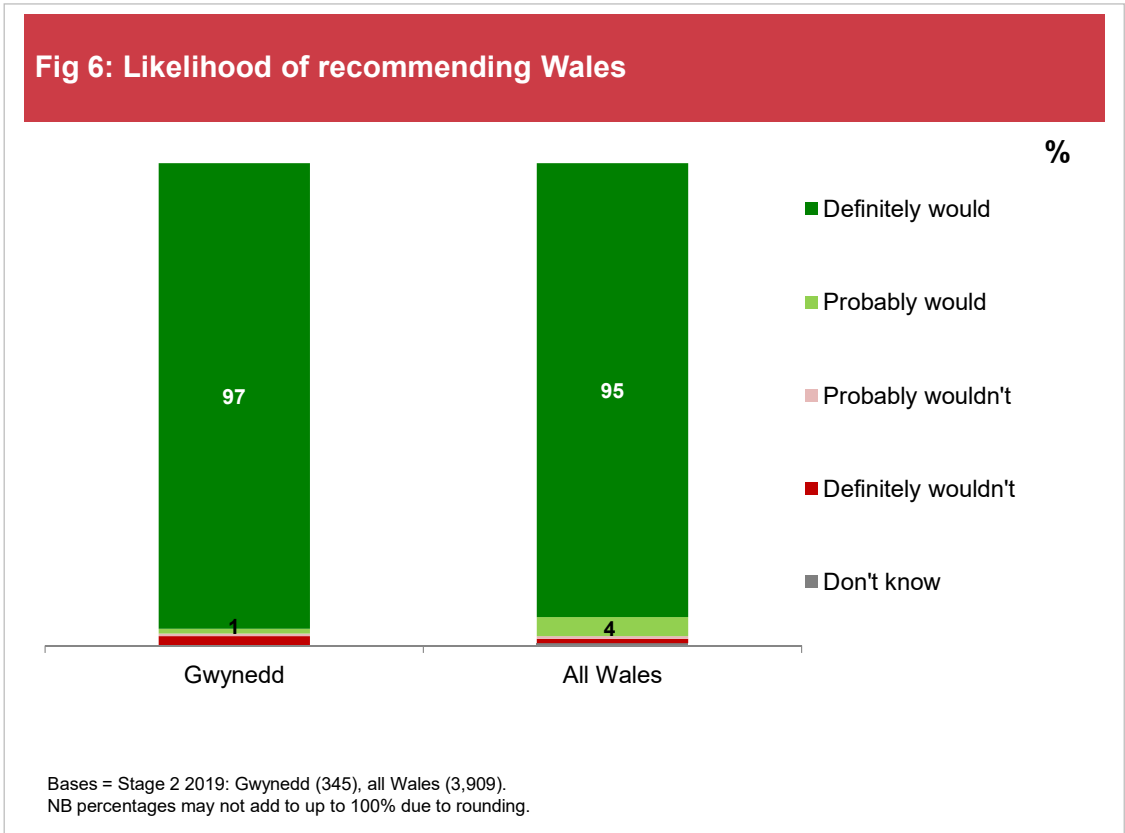
Visitors who lived in Wales were very likely to say that they would *definitely* visit again (97%), while 84% of UK visitors and just a third of overseas visitors (33%) said this. NB very small sample size of overseas visitors.

Similarly, 94% of repeat visitors said they would *definitely* visit again. Only 70% of new/lapsed visitors said that they would definitely return to the area for another visit although overall general likelihood of revisiting was high amongst all visiting frequency groups – 94% of new/lapsed visitors had some likelihood of revisiting, rising to 97% of repeat visitors.

4.4.4 Recommendation

Reflecting the high levels of visitor satisfaction and strong likelihood of returning to Wales in future, almost all visitors to Gwynedd said that they would recommend it as a place to visit (98%); 97% would *definitely* recommend, and 1% would *probably* recommend Wales to friends and family. 2% of Gwynedd visitors did say they would not recommend Wales, and interestingly almost all of these people lived in Wales themselves.

The overall positive findings for Gwynedd are in line with the findings across Wales on average, where 99% would recommend Wales and only 1% would not – see Figure 6 below.




## Appendix I: Detailed list of survey locations

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

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

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

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

**APPROACH ADULTS AGED 16+ - READ OUT**

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

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

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

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

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

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

<p><b>(IF LIVE OUTSIDE OF WALES)</b></p> <p><b>Q5</b> 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><b>Q11 Working status</b> (36)</p> <p>Working full time (30+ hrs per week)..... 1</p> <p>Working part time (&gt; 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><b>(IF LIVE IN WALES)</b></p> <p><b>Q6</b> 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><b>Q12 Status in household</b> (37)</p> <p><b>READ OUT - The Chief Income Earner</b> is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source.</p> <p>Chief income earner..... 1</p> <p>Other adult (aged 16+)..... 2</p>
<p><b>(ASK ALL) – SHOWCARD B</b></p> <p><b>Q7</b> Which of the following best describes your party on this visit? (24)</p> <p><b>SINGLE CODE</b></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><b>Q13 Occupation of Chief Income Earner</b> (last job if retired)</p> <p>Actual job</p> <p>_____</p> <p>Position / grade</p> <p>_____</p>
<p><b>Q8</b> How many people are in your visitor party today, including yourself? (24)</p> <p><b>WRITE IN NO. OF ADULTS &amp; CHILDREN</b></p> <p>Adults:</p> <p>Children:</p>	<p><b>Q14 Social grade</b> (38)</p> <p>AB..... 1</p> <p>C1..... 2</p> <p>C2..... 3</p> <p>DE..... 4</p>
<p><b>Q9 Gender</b> (31)</p> <p>Male..... 1</p> <p>Female..... 2</p> <p>Other ..... 3</p> <p>Prefer not to say..... 4</p>	<p><b>SHOWCARD C</b></p> <p><b>Q15</b> What is your ethnic group?</p> <p>White Welsh ..... 1</p> <p>White British/English/Scottish/Northern Irish ..... 2</p> <p>White Irish..... 3</p> <p>White Gypsy or Irish Traveller..... 4</p> <p>Other White..... 5</p> <p>White and Black Caribbean..... 6</p> <p>White and Black African..... 7</p> <p>White and Asian..... 8</p> <p>Other Mixed/Multiple ethnic background..... 9</p> <p>Indian..... 10</p> <p>Pakistani..... 11</p> <p>Bangladeshi..... 12</p> <p>Chinese..... 13</p> <p>Japanese..... 14</p> <p>Other Asian background..... 15</p> <p>African..... 16</p> <p>Caribbean..... 17</p> <p>Other Black/African/Caribbean background..... 18</p> <p>Arab..... 19</p> <p>Any other ethnic group..... 20</p>
<p><b>Q10 Age</b> (32)</p> <p><b>PLEASE WRITE IN EXACT AGE</b> _____</p> <p>IF REFUSE, PLEASE ASK FOR AGE BAND</p> <p>16-19..... 1    55-64..... 6</p> <p>20-24..... 2    65-74..... 7</p> <p>25-34..... 3    75-84..... 8</p> <p>35-44..... 4    85+..... 9</p> <p>45-54..... 5    Refused..... A</p>	



**SHOWCARD D**

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

**CAN MULTI-CODE**

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

**SHOWCARD E**

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

**CAN MULTICODE**

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

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

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

**SHOWCARD F  
IF YES TO Q18**

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

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

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

**RECORD CONTACT DETAILS BELOW - READ THESE BACK TO CHECK**

**RECORD CONTACT DETAILS WILL ONLY BE USED FOR PURPOSES OF RESEARCH**

Name: \_\_\_\_\_

Preferred telephone number: \_\_\_\_\_ Back-up telephone number \_\_\_\_\_

**IF USA – RECORD STATE THEY LIVE IN:** \_\_\_\_\_



## **Appendix III: Stage 2 survey questionnaire (telephone interviews)**

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

**CASE NUMBER (FROM STAGE 1)**

**CONTACT NAME:**

**TELEPHONE NUMBER:**

**WELSH SPEAKER:**

**SITE NAME (FOR QUESTION WORDING):**

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

**COUNTRY OF RESIDENCE (FOR QUESTION WORDING):**

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

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

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

English

Welsh

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

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

Yes – IF YES, CONTINUE

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

**SECTION 1 – VISITING WALES**

**ASK IF STAYING VISITOR**

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

Once in three years

2 – 3 times

4 – 6 times

7 – 10 times

More than 10 times

Don't know / can't remember

**ASK IF DAY VISITOR**

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

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

Don't know / can't remember

**ASK IF STAYING VISITOR**

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

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

Don't know / can't remember

**ASK IF STAYING VISITOR**

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

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

Don't know / can't remember

**ASK IF STAYING VISITOR**

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

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

Don't know / can't remember

**SECTION 2 – TRAVELLING IN AND AROUND WALES**

**ASK IF OVERSEAS VISITOR**

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

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

Don't know / can't remember

**ASK IF DAY OR STAYING VISITOR FROM OUTSIDE WALES**

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

**ASK ALL**

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

	<b>Q7</b>	<b>Q8</b>
	<b>Column A</b>	<b>Column B</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 ( <b>specify arrival airport</b> )		
_____		
Other ( <b>please specify how and where arrived</b> )		
_____		
Don't know / can't remember		

**SECTION 3 – ACTIVITIES UNDERTAKEN & MOTIVATIONS FOR VISITING****ASK ALL**

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

**IF MORE THAN ONE CODED AT Q9 ASK Q10**

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

To take part in outdoor or sporting activities (e.g. walking, cycling, fishing etc.) → **Q11**

To attend an event / concert / performance / sporting event → **Q12**

To enjoy the landscape / countryside / beach → **Q13a**

To visit places / historical sites / religious sites / specific attractions / go sightseeing → **Q14**

For a city break / visit to a large town → **Q14**

To shop

To visit friends or relatives

To attend a special event / celebration such as a wedding or graduation

To visit a spa or have a beauty or health treatment

For genealogy / to trace my ancestry

Other (**please specify**)

Don't know / can't remember

**ASK IF CODE 1 AT Q9**

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

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

**ASK IF CODE 2 AT Q9**

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

Sporting event  
Live concert  
Theatre or cinema performance  
Arts / cultural festival / Eisteddfod  
Music festival  
Food / drinks festival  
Activity event e.g. walking festival, cycle race, charity run  
Other (**please specify**)  
  
Don't know / can't remember

**ASK IF CODE 3 AT Q9**

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

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

**ASK IF VISITED A BEACH AT Q13a**

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

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

**ASK IF CODE 4 OR 5 AT Q9**

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

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

GO TO Q15

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

GO TO Q16

**ASK IF CODE 1-10 AT Q14**

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

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

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember



**ASK ALL**

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

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

Other (**please specify**)  
None of these  
Don't know

**ASK IF STAYING VISITOR**

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

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

Other (**please specify**)  
None of these  
Don't know

**SECTION 4 – EATING OUT**

**ASK ALL**

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

Yes → **Q19**  
No → **GO TO SECTION 5**  
Don't know / can't remember → **GO TO SECTION 5**

**ASK IF YES AT Q18**

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

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

**READ OUT**

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

**SECTION 5 – ACCOMMODATION**

**ASK IF STAYING VISITORS**

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

Hotel

B&B or Guesthouse

Farmhouse

Caravan (touring / campervan / motorhome)

In rented static caravan

In own static caravan

Camping

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

Serviced apartment

Friend's / relative's home

Someone else's home on a commercial basis

Own second home / time share

Holiday camp/village

Hostel

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

Boat

Cruise ship

University accommodation

Other (**please specify**)

Don't know / can't remember

### ASK IF STAYING VISITOR

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

#### SINGLE CODE

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

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

### ASK IF STAYING VISITOR AND STAYED IN COMMERCIAL ACCOMMODATION

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

- Quality
- Service
- Value for money
- Overall satisfaction

#### READ OUT

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

Don't know / can't remember  
Not applicable

### ASK IF STAYING VISITOR AND STAYED IN COMMERCIAL ACCOMMODATION

**Q23** How did you book your accommodation or package?  
**DO NOT PROMPT – SINGLE CODE**

- Directly with the provider (phone / email / the provider's website)
- Through a third party online accommodation site (e.g. booking.com, expedia, laterooms.com)
- Through a deals site (e.g. Groupon, kgb, etc.)
- Through a link on the VisitWales.com website
- Through a travel agent or tour operator
- Through a tourist information centre
- Through Airbnb
- Just turned up → **SKIP Q24**
- Other (please specify) → **SKIP Q24**

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

**ASK IF STAYING VISITOR AND BOOKED IN ADVANCE**

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

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

Don't know / can't remember

**ASK IF STAYING VISITOR AND STAYING IN COMMERCIAL ACCOMMODATION**

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

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

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

**SECTION 6 – SOURCES OF INFORMATION AND MARKETING**

**ASK ALL**

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

**ASK IF WEBSITE CODED AT Q27**

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

**ASK ALL**

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

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

Don't know / can't remember

**ASK IF CODED 1 OR 3 AT Q30**

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

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

Don't know / can't remember

**ASK IF CODED 2 OR 3 AT Q30**

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

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

Don't know / can't remember

**ASK ALL**

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

Yes  
No

Don't know / can't remember

**IF YES AT Q33**

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

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

9

10 – Only reason I visited

Don't know / can't remember

## **SECTION 7 – SUSTAINABILITY, SENSE OF PLACE AND OTHER ISSUES**

### **ASK ALL**

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

**READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS**

Strongly agree  
Slightly agree  
Slightly disagree  
Strongly disagree

Don't know

### **ASK ALL**

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

**READ OUT – CODE ALL MENTIONED – RANDOMISE LIST**

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

Any others **(please specify)**

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

### **ASK ALL**

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

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

**INVERT SCALE BETWEEN RESPONDENTS**

Very important  
Quite important  
Not very important  
Not at all important

Don't know

## SECTION 8 – SATISFACTION / OVERALL EXPERIENCE

### ASK ALL

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

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

### SINGLE CODE

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

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

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

### RECORD VERBATIM

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- Nothing  
Don't know

### ASK ALL

**Q40** Overall, would you say your trip to/in Wales was....?

### READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

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

Don't know



**ASK ALL**

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

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

Don't know

**ASK IF STAYING VISITOR**

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

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

Don't know

**ASK IF DAY VISITOR**

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

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

Don't know

**ASK ALL**

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

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

Don't know

**ASK IF OVERSEAS VISITOR**

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

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

**ANY PARTNER-SPECIFIC QUESTION TO BE ADDED HERE**

**ASK ALL**

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

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No other comments

**ASK ALL**

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

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

Yes - willing to be re-contacted - **RECORD NAME AND TELEPHONE NUMBER**  
No

**Thanks very much for your time.**

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

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

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

**Thanks again and goodbye.**

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