

# Wales Visitor Survey 2013

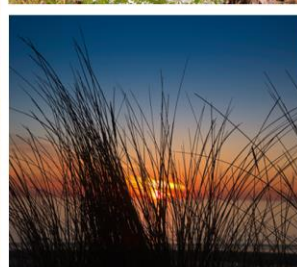
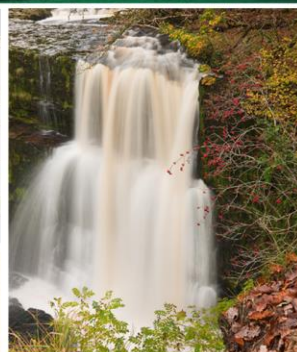
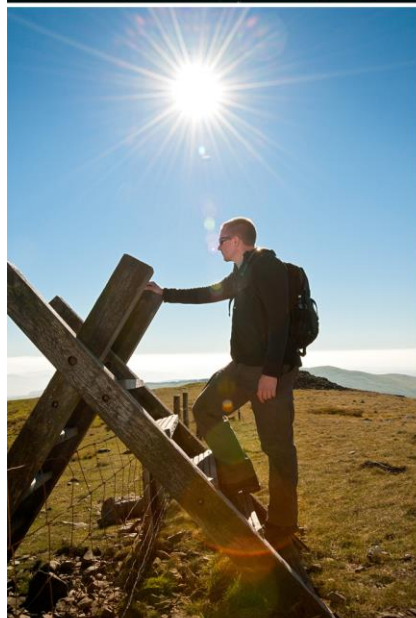
## REPORT – UK Staying Visitors



Llywodraeth Cymru  
Welsh Government

[www.cymru.gov.uk](http://www.cymru.gov.uk)

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# 1. Headline Findings

## **Satisfaction ratings are up**

- 1.1 Overall during-trip satisfaction with Wales is up slightly from 9.1 on average to 9.3. Satisfaction remains quite high post-trip, although it slips slightly to 8.9. Satisfaction among new visitors (9.3) is almost as high as it is for repeat visitors (9.4), showing that Wales makes an instant impression.
- 1.2 'Quality of the natural environment' (9.5 – up from 9.3 in 2011) and 'friendliness of people' (9.4 – up from 9.2 in 2011) remain the two highest aspects of satisfaction.
- 1.3 Attraction ratings have risen significantly since 2011, with overall satisfaction up to 9.2 from 8.5.

## **'I didn't think it would be that good!'**

- 1.4 There is a significant difference between what visitors expect before their trip, and what they end up experiencing. Most (71%) new/lapsed visitors and even half (50%) of repeat visitors say post-trip that their trip to/in Wales was better than they expected.

## **Significant increase in motivation to visit specific attractions / places, and to take part in outdoor activities**

- 1.5 The motivation to visit Wales 'to visit places / historical sites / specific attractions / sightseeing' has risen significantly from 38% in 2011 to 58% in 2013. Similarly 'to take part in outdoor activities' has risen significantly from 18% in 2011 to 35% in 2013.
- 1.6 It appears that whilst Wales' natural environment is still the biggest draw of all, visitors are more aware that there are also significant other things to do in Wales. It is also likely that the dry and sunny weather this summer compared to 2011 has played a significant part in this increase in outdoor activities.

## **Didn't need to go abroad to sunbathe this year**

- 1.7 The beach is the most frequently mentioned specific reason for visiting Wales in 2013 by quite a margin, featuring in some way in nearly half (46%) of trips. Visitors have enjoyed the warm sunny weather in the summer of 2013.
- 1.8 Visiting a castle or historic attraction is the second most frequently mentioned reason, featuring in a third (34%) of trips.

### **‘Active Family Explorers’ and ‘Pre-family Explorers’ most attracted to Wales**

- 1.9 The two *Explorer* market segments are by far the most likely segments to visit Wales in comparison to the proportion of the UK population that they represent.
- 1.10 One in six (17%) UK staying visitors to Wales are ‘Pre-family Explorers’, which compares to 8% of the UK population.
- 1.11 13% of UK staying visitors to Wales are ‘Active Family Explorers’, which compares to 6% of the UK population.

### **Opinions of Wales’ sustainability are highest among those to whom it matters the most**

- 1.12 Over half (55%) of visitors ‘strongly agree’ that Wales represents a sustainable tourism destination for breaks and holidays. The strongest agreement is among those to whom sustainability matters the most. Of those answering that it is ‘very important’ that a destination they choose to visit is managed sustainably, the vast majority (77%) ‘strongly agree’ that Wales meets that requirement.

### **New visitors will come back for more**

- 1.13 About two thirds (63%) of new/lapsed visitors say they will ‘definitely’ return to Wales in the near future, and about a third (34%) ‘probably’ will – the same result as in 2011.

### **‘I had a brilliant time in Wales. You should go!’**

- 1.14 An extremely high proportion (96%) of visitors say they would ‘definitely’ recommend Wales to a friend or relative.



## 2. Background and Methodology

### What is the Wales Visitor Survey?

- 2.1 Visit Wales conducts a survey of visitors to Wales during their trip approximately every two years. Surveys similar to the 2013 survey have been conducted since 2000. Visitors are categorised into three specific markets: UK Staying, Day and Overseas.
- 2.2 The main objectives of the Survey are to understand in more detail:
  - Profile of visitors to Wales
  - Satisfaction with visit – during-trip and post-trip
  - Motivation for visiting
  - Accommodation and transport used
  - Attitudes towards sustainability of Wales as a destination
- 2.3 In 2013 the topic of ‘information needs of visitors’ has been researched in detail during the Visitor Survey and in supplementary focus groups; this whole topic is covered separately in a stand-alone report.

### How was the 2013 Survey conducted?

- 2.4 Visit Wales commissioned Strategic Marketing to undertake the Wales Visitor Survey in 2013. The Survey was conducted using three methods:
  - 3,323 face to face interviews during trip
  - 750 follow-up telephone interviews post-trip with a representative sample of visitors from the face to face survey
  - 5 focus groups with visitors (*to explore the subject of information needs; reported separately*)

#### Face to face interviews

- 2.5 Face to face interviews took place at 55 sampling locations around Wales, consistent with previous Visitor Surveys. A full list of the locations is included as an appendix.
- 2.6 Sampling quotas were set by local authority area (i.e. where the interview took place) in proportion to the universe of visitors to Wales taken from data in the Great Britain Tourism Survey, the Great British Day Visitors Survey and the International Passenger Survey.
- 2.7 The breakdown in number of face to face interviews by local authority area and region of Wales (i.e. where the interview took place) is shown below:

Region	No. of face to face interviews	Local authority area (where the interview took place)	No. of face to face interviews
North	993	Anglesey	162
		Conwy	227
		Denbighshire	162
		Flintshire	69
		Gwynedd*	289
		Wrexham	84
Mid	343	Ceredigion	178
		Powys	165
South West	677	Carmarthenshire	157
		Neath Port Talbot	65
		Pembrokeshire	255
		Swansea	200
South East	1,310	Blaenau Gwent	52
		Bridgend	75
		Caerphilly	156
		Cardiff	402
		Merthyr Tydfil	40
		Monmouthshire	111
		Newport	148
		Rhondda Cynon Taff	130
		Torfaen	102
		Vale of Glamorgan	94
<b>Total</b>	<b>3,323</b>		<b>3,323</b>

\*Interview sites in Gwynedd are located in North Wales

2.8 Filter questions in the questionnaire ensured that respondents met the criteria for either a Staying or Day Visitor to Wales:

- Aged 16 or over
- Purpose of visiting not routine shopping, routine appointment, business or study
- Day Visitors must have spent three or more hours away from home (including travel)
- Staying Visitors must have spent at least two nights in Wales at the point of interview if their total length of intended stay was four

or more nights; or at least one night in Wales if the total length of intended stay was fewer than four nights

- 2.9 All interviews were conducted by trained face to face interviews working to MRS and IQCS standards. Interviews were conducted between late March and September 2013 on a mixture of weekdays and weekends, inside and outside of school holidays.

Telephone follow-up interviews

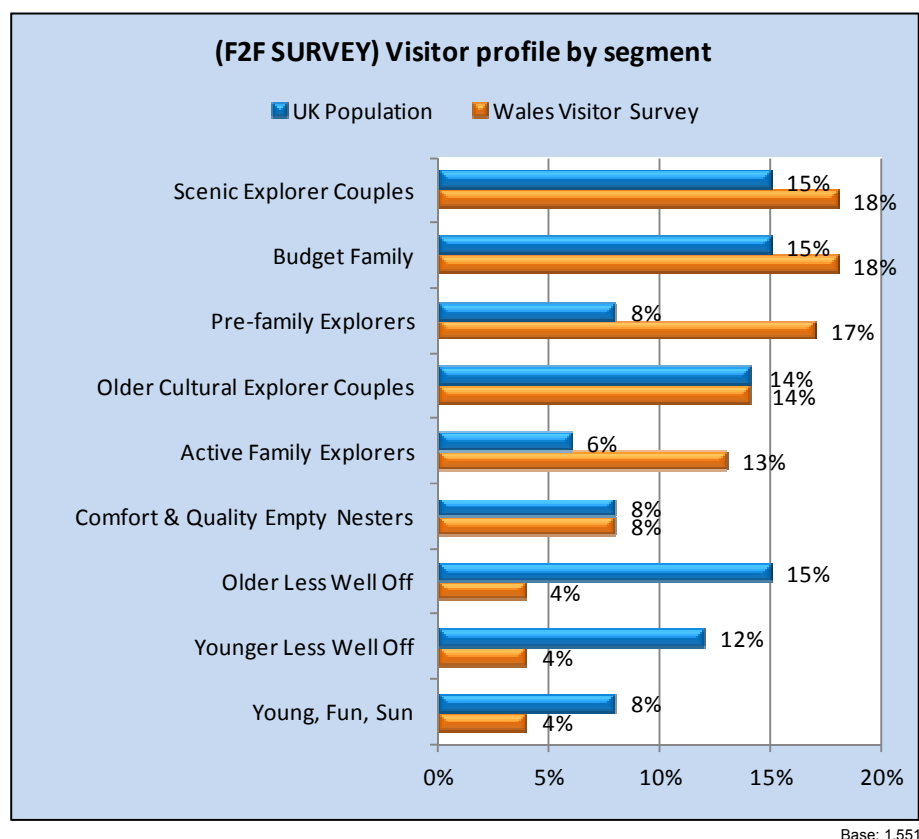
- 2.10 We conducted 750 follow-up interviews by telephone with a representative sample of visitors participating in the face to face survey. In previous years the follow-up surveys were conducted online, meaning that the sample was self-selecting. The advantage of the telephone method is that the follow-up sample reflects the sample of the main face to face survey.

**What does this report cover?**

- 2.11 This report covers the UK Staying visitor market; Day visitors and Overseas visitors are discussed in separate reports.
- 2.12 The report covers the main face to face survey (1,618 interviews with UK staying visitors), and the telephone follow-up survey (406 interviews with UK staying visitors) with the exception of questions relating to visitor information needs. All aspects of information needs are also discussed in a separate report.
- 2.13 In the interests of keeping this report reasonably concise and reader-friendly, we focus on the most significant findings and differences between respondent groups. Full sets of cross-tabulations for each question broken down by different respondent groups are provided separately.

### 3. Visitor Profile

#### Market Segmentation

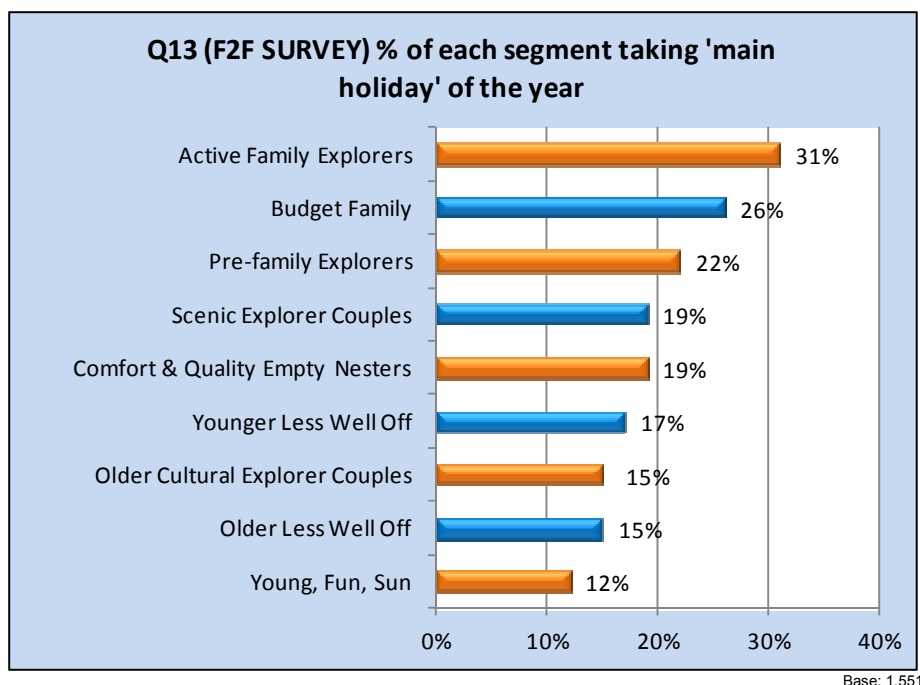


#### **‘Active Family Explorers’ and ‘Pre-family Explorers’ most attracted to Wales**

- 2.14 The two *Explorer* market segments are by far the most likely segments to visit Wales in comparison to the proportion of the UK population that they represent. These are priority target segments for Visit Wales.
- 2.15 ‘Scenic Explorer Couples’ is also a priority target segment, and its proportion of the Wales UK staying visitor sample (18%) is slightly above the UK population (15%).
- 2.16 ‘Older Cultural Explorer Couples’ is a priority target segment; its proportion of the Wales UK staying visitor sample (14%) is the same as the UK population.
- 2.17 The ‘Older Less Well Off’, ‘Younger Less Well Off’ and ‘Young, Fun, Sun’ segments all make up a much smaller proportion of Wales’ visitors than of the UK population.



## Wales as a main holiday by market segment



### Segments more attracted to Wales are more likely to be on their main holiday

- 2.18 Segments which are better represented in the Wales visitor profile compared to the UK population are more likely to spend their main holiday in Wales, especially 'Active Family Explorers'.
- 2.19 Segments under-represented in Wales are more likely to be found taking a short break.

## Origin of visitors – overall

Origin of visitors (Face to face survey)	Overall		Region of Wales visited			
	2013	2011	North	Mid	South West	South East
Wales	17%	17%	7%	28%	19%	26%
England – North	26%	26%	48%	13%	13%	14%
England – Midlands	24%	24%	27%	29%	23%	20%
England – South West	11%	9%	3%	10%	17%	15%
England – South East	19%	21%	12%	19%	26%	24%
UK Other	2%	3%	3%	1%	2%	1%
Sample size	1,475	2,504	564	172	341	398

### 2013 staying visitor profile almost identical to 2011 profile

- 3.1 The profile of staying visitors to Wales in 2013 by origin is almost identical to how it was in 2011, with about one in six (17%) staying visitors being Welsh residents, and English visitors split fairly equally between North (26%), Midlands (24%) and South (30%).
- 3.2 The movement of visitors between the various regions of England and Wales is also very similar to how it was in 2011, with English visitors for obvious reasons travelling more to the part of Wales which is most accessible for them. North Wales is noticeably reliant on visitors from northern England – about half (48%) of its staying visitor market.

## Movement of Welsh residents

Region visited	Origin of Welsh Residents			
	North	Mid	South West	South East
North	40%	39%	4%	6%
Mid	18%	26%	24%	17%
South West	5%	13%	24%	34%
South East	36%	22%	48%	43%
Sample size	55	23	54	125

### Some North Wales residents head to South East Wales, but South Wales residents tend not to travel to North Wales

- 3.3 Over a third (36%) of North Wales residents interviewed have made their visit to South East Wales. However, these visits southwards are not reciprocated, as only a minority (6%) of South East Wales residents and a smaller proportion (4%) of South West Wales residents have stayed in North Wales. South Wales residents instead prefer to travel east-west or west-east along the M4 if they leave their own region.

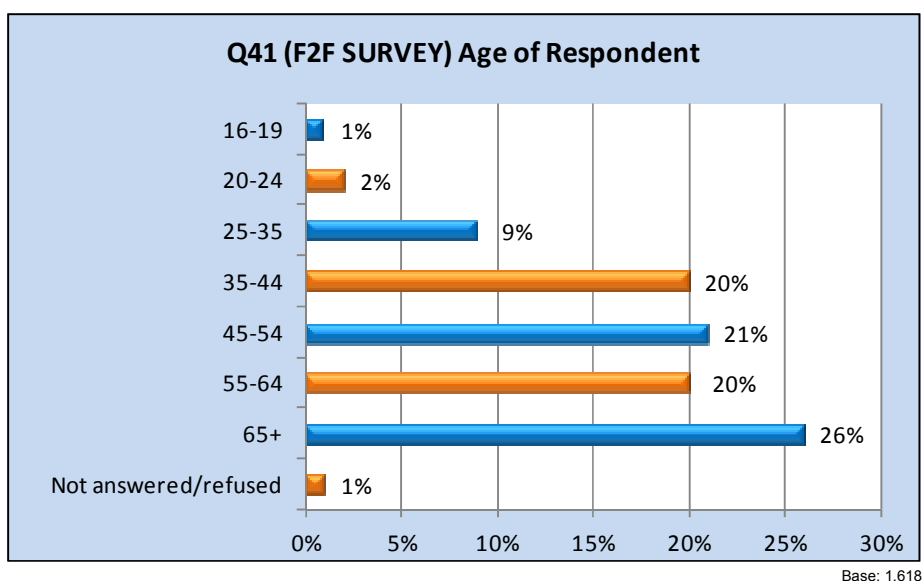
### Why is that?

- 3.4 We have taken the opportunity to explore this in the Cardiff focus group as part of the accompanying *Information Needs* research. The general opinion is that the roads between North and South Wales mean the journey time is too long to be worthwhile. Destinations outside of Wales of similar journey time are perceived to offer an experience which is more different to the norm than what another part of Wales offers. There is also a perceived cultural barrier with Welsh-speaking North West Wales.

*“Down here we seem to have everything within close proximity”*  
Female, Cardiff

- 3.5 The group also believed that North Wales residents have more reason to travel to South East Wales because it contains the capital city with its various potential draws such a major university and rugby internationals.
- 3.6 This view appears to be supported by the figures in the survey, whereby about half of North Wales residents staying in the South East have stayed in Cardiff, and of the 41% making the effort to travel to the South, only 5% visited the South West.

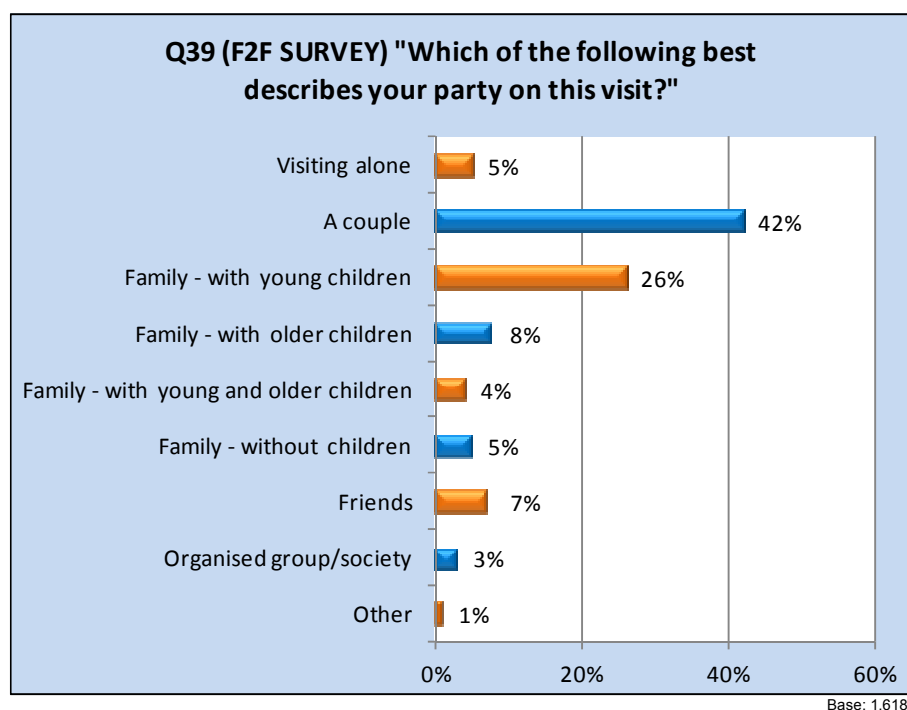
## Age of visitors



### Age profile nearly identical to 2011

- 3.7 The age profile of staying visitors to Wales in 2013 is very similar to the 2011 profile. Between the ages of 35 and 64, the percentage of visitors reflects the UK population very closely, but the age group which is very much lacking is the under 35's, which make up one third (33%) of the UK adult population, but just 12% of staying visitors to Wales.
- 3.8 Differences between region of Wales visited are not significant – unlike in 2011, when South West Wales attracted a slightly higher age profile than the other regions.

## Type of visiting party



### Wales attracts families with young children and older couples

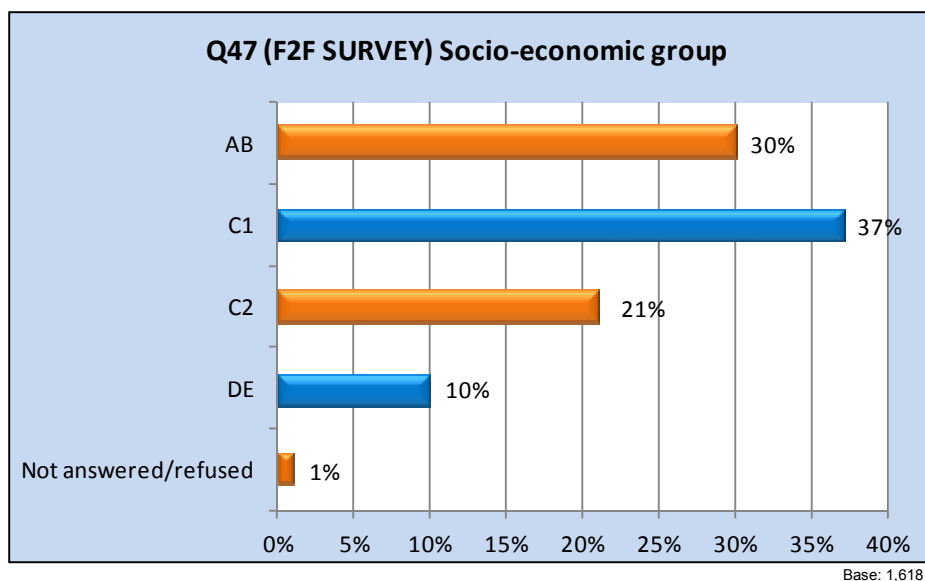
- 3.9 Wales is an attractive staying destination for older couples (especially over 45's) and families with young children.

*"With everything for the kids being free it's great!"*  
Welsh resident

*"Wales is good for children. Clean, friendly, such a lovely place to visit. We love Wales"*  
UK visitor, West Midlands

- 3.10 Groups which appear to be lacking slightly in the staying visitor profile are families with older children, and young couples. This would suggest that Wales is not generally perceived as a 'young person's place'.

## Socio-economic group



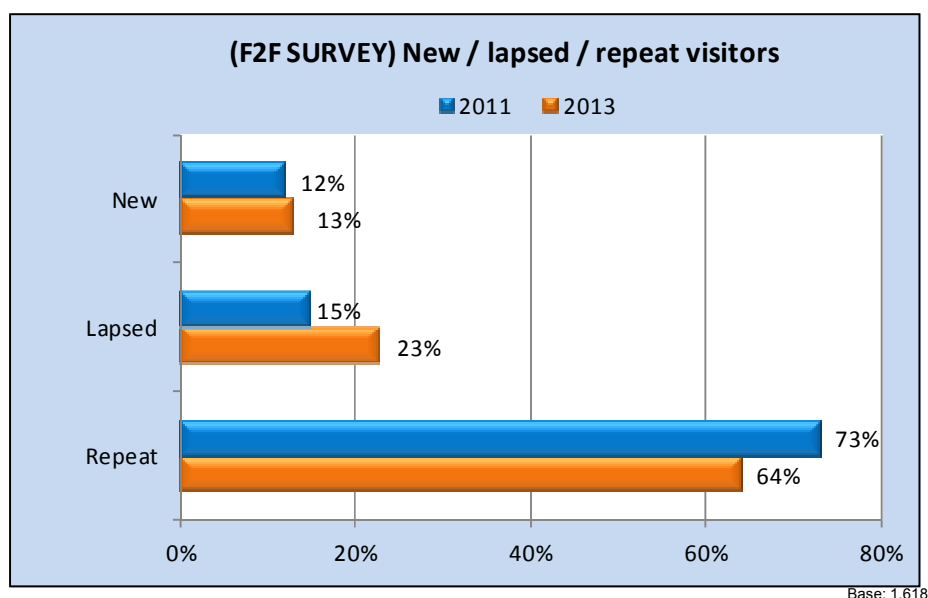
### ABC1 proportion remains high

3.11 Wales has for a long time attracted a higher proportion of ABC1s than the UK population, and this year the profile remains the same (two thirds (67%) of staying visitors).

*"It is a very cultural experience, family-orientated and family-friendly"*  
UK visitor, East Midlands



## New / lapsed / repeat visitors

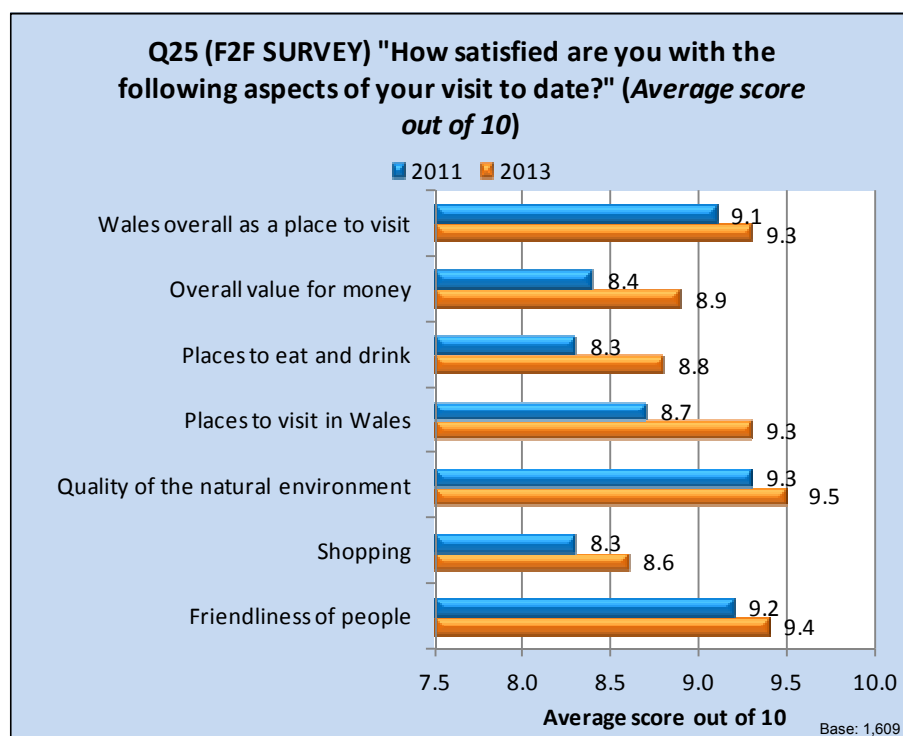


### Lapsed visitors on the increase

- 3.12 The proportion of lapsed visitors (23%) in the sample is significantly higher than in 2011 (15%). Without knowing the universe of new, lapsed and repeat visitors to Wales, this could mean one of two things: either visitors are waiting longer before they return to Wales, or more lapsed visitors are being attracted back to Wales.
- 3.13 Given that the vast majority (80%) of visitors say they will 'definitely' return to Wales 'within the next few years', it appears that repeat visitors are being maintained, whilst more lapsed visitors are being attracted back.
- 3.14 South East Wales has attracted more new and lapsed visitors (43% of its staying profile) compared to the other regions of Wales (33% of the profile).
- 3.15 Nearly a quarter (22%) of the 'Young, Fun, Sun' market segment are new visitors to Wales – a higher proportion than in the other segments.

## 4. Satisfaction Ratings

### Satisfaction ratings – during trip



### Nature and people – Wales' key strengths

- 4.1 Nature and people are two of Wales' key strengths, shown in both the satisfaction ratings and in the comments given on what comes to mind when people think of Wales.

*"I think I take it too much for granted. When friends come to stay they are always blown away"*  
Welsh resident

- 4.2 'Quality of the natural environment' scores an extremely high 9.5 average, even higher than in 2011.

*"Lovely mountains – good walks"*  
UK visitor, North West

*"It is the most breathtaking countryside in the UK"*  
Welsh resident

*"I wish it was closer to Sheffield. It is such a wonderful place"*  
UK visitor, Yorkshire

- 4.3 'Friendliness of people' also scores very highly at 9.4, higher than in 2011 (9.2). The comments back this up. The friendliness rating is high in each region of Wales visited.

*"Wales is very, very friendly and I always enjoy it"*  
UK visitor, West Midlands

*"Friendliness has improved over the years"*  
UK visitor, South West

*"I didn't want to come home, fell in love with the place. The people were friendly and helpful, I want to move there."*  
UK visitor, Yorkshire

- 4.4 Satisfaction with Wales is very high overall – an average rating of 9.3, higher than in 2011 average (9.1).

*"I absolutely love Wales"*  
UK visitor, South West

*"Never had a bad trip to Wales"*  
UK visitor, South West

### **Satisfaction is high across most market segments**

- 4.5 Overall satisfaction is consistently very high across the market segments but slightly lower among 'Young, Fun, Sun' (8.9) and 'Younger Less Well Off' (8.9)

### **Wales makes an instant impression**

- 4.6 Overall satisfaction is almost as high among new visitors (9.3 average) as it is among repeat visitors (9.4).

*"Well I just want to go again. I can't wait. They cater for all needs"*  
UK visitor, North East

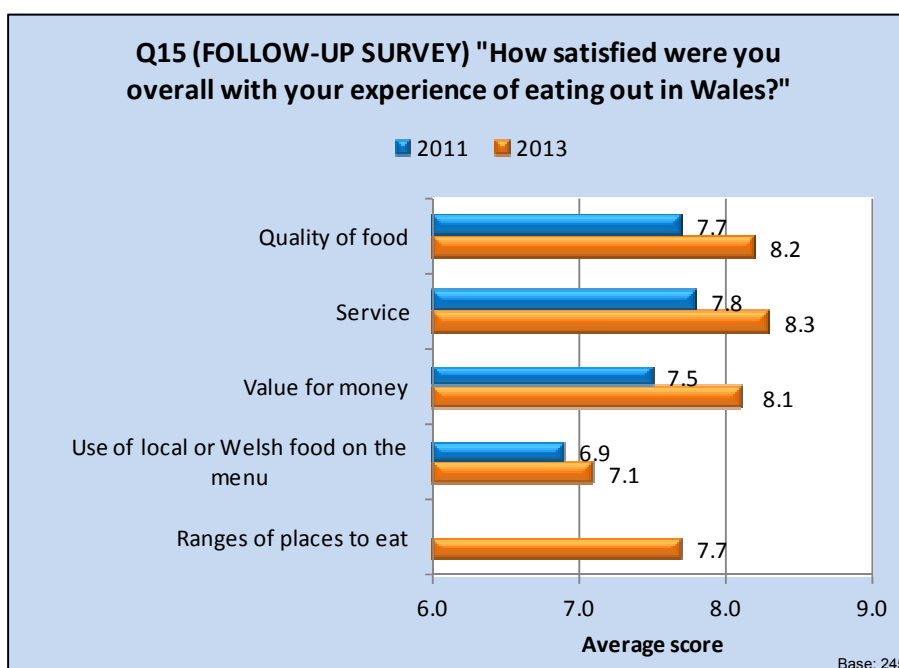
*"It's my first time – very friendly people and I thoroughly enjoyed myself. I'll be back soon!"*  
UK visitor, North West

## Commercial aspects of Wales are not as strong

- 4.7 Commercial aspects of the Wales tourism offering such as shopping and places to eat and drink are not as strong.

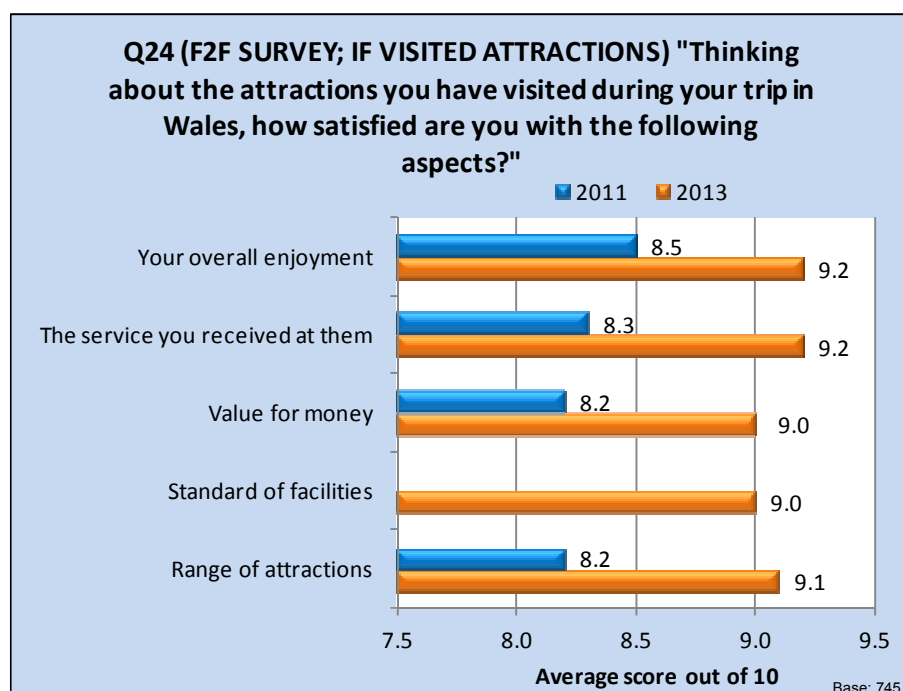
*“\*\*\* doesn’t have any proper shopping areas and what it does have is grimy”*  
Welsh resident

- 4.8 Visitors don’t necessarily need to shop, and going by the high proportion of ‘not applicables’ for shopping (28%), many do not.
- 4.9 They do however need to eat, and so it important that ‘places to eat and drink’ has risen significantly from 8.3 to 8.8 since 2011. The ratings for eating out in Wales (shown below) are not as high as for other elements of the trip, but they have at least risen since 2011.



*'Ranges of places to eat' was not asked in 2011*

## Attraction ratings



N.B. In 2013 this question was asked during trip, whereas in 2011 it was asked post-trip and so the results are not directly comparable, but are shown side by side for reference

### Attraction ratings are high

4.10 Visitors to attractions in Wales in 2013 have enjoyed themselves greatly, with the overall average enjoyment score at 9.2.

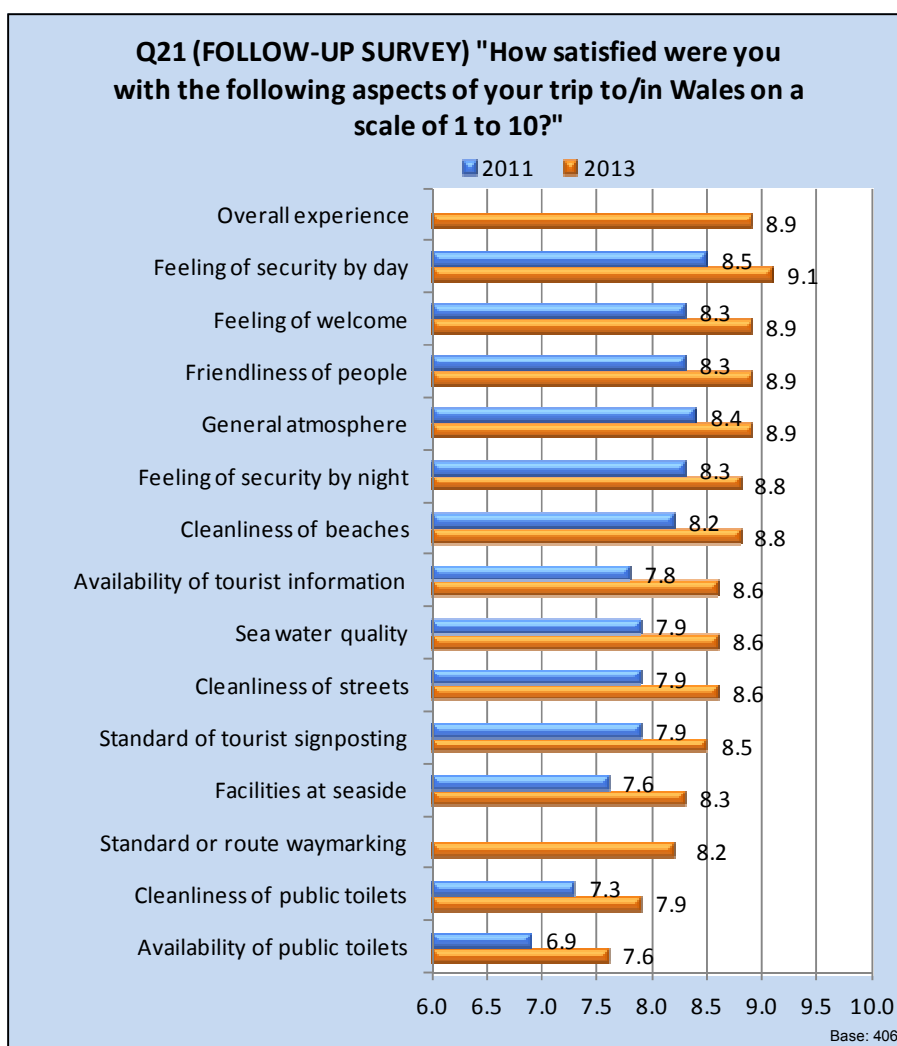
*"I think Anglesey Sea Zoo is a good site. It has a good amount to offer and it isn't very crowded like some other places"*  
Welsh resident

*"One thing that's very good is the National Slate Museum and the fact that it's free is a big pull for organising a large school trip deciding to visit Wales"*  
UK visitor, South West

*"Chepstow is a lovely place. The castle is very good and we all had a jolly time"*  
UK visitor, West Midlands

*"St Fagans shows what Wales was and is all about – unique to Wales – brilliant"*  
Welsh resident

## Overall satisfaction ratings – post-trip



*The above satisfaction rating question was asked in the telephone follow-up survey. On average respondents were interviewed around two months after their trip.*

*'Overall experience' and 'standard of route waymarking' were not asked in 2011*

### **Trips to Wales remain high on the satisfaction scale after time, but not as high as during trip**

- 4.11 After visiting Wales and having a great time, visitors return home to get on with their everyday life. The feeling of satisfaction remains at a high level, although not quite as high as during the trip. The overall satisfaction rating post-trip is 8.9 - compared to the average rating during-trip of 9.3.

*"Can't fault the place [Wales]. Loads to do, definitely going back"*  
UK visitor, South West



*“We had a great time and enjoyed ourselves immensely”*  
UK visitor, North West

- 4.12 The friendly welcome that visitors experience is remembered post-trip; however the average rating of ‘friendliness of people’ does drop from 9.4 during-trip to 8.9 post-trip.
- 4.13 All of the ratings have risen significantly since 2011. However, some caution needs to be taken as the methodology used in 2011 was self-completion (online), and answers to lengthy grid questions can vary significantly between self-completion and telephone.

#### **Most aspects are very well rated**

- 4.14 Wales is generally well rated as a tourist destination in terms of a number of aspects relating to cleanliness, security and welcome.
- 4.15 Across the ratings there are very few significant differences by region of Wales visited, origin of visitor (Wales / UK other), or new / lapsed / repeat visitor. It appears that Wales offers a consistent standard of tourism product which achieves satisfaction among a range of its visitors.

#### **South West Wales scores highest for beach ratings**

- 4.16 The beach has been the highest single reason for visiting Wales this year (discussed later) and it is South West Wales which offers its visitors the best standards of cleanliness, with an average rating of 9.2, and the best seaside facilities (8.6 average). Mid Wales scores lowest on cleanliness with 8.1, and South East Wales scores lowest on facilities (7.9).

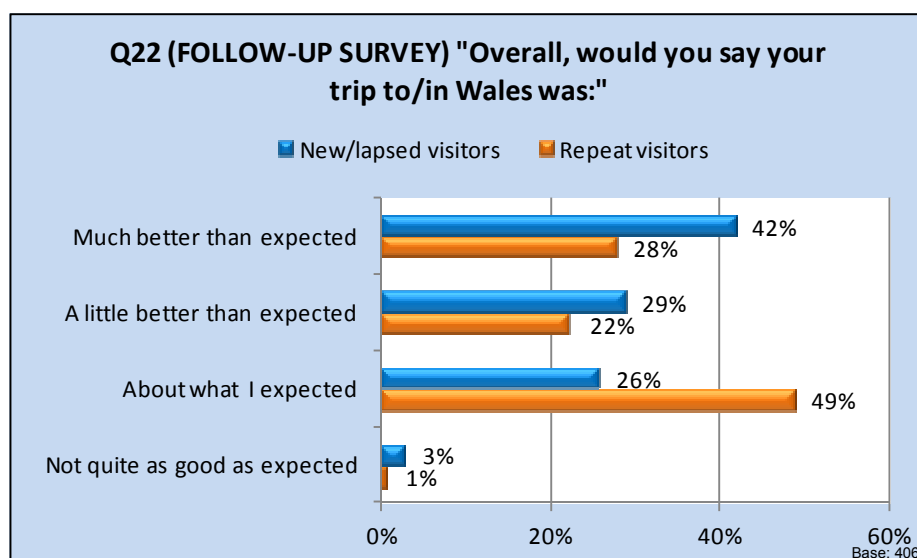
#### **In need of relief**

- 4.17 Public toilets – availability and cleanliness – are the lowest rated aspect of the destination. About a third (34%) of respondents answered ‘not applicable’, indicating that they did not use one.

*“Must have more ladies loos at St David’s Hall”*  
UK visitor, South West

- 4.18 It is more difficult to find relief in North and Mid Wales, where availability of public toilets averages 7.3, compared to South Wales (8.0).

## Experience compared to expectations



### 'I didn't think it would be as good as that!'

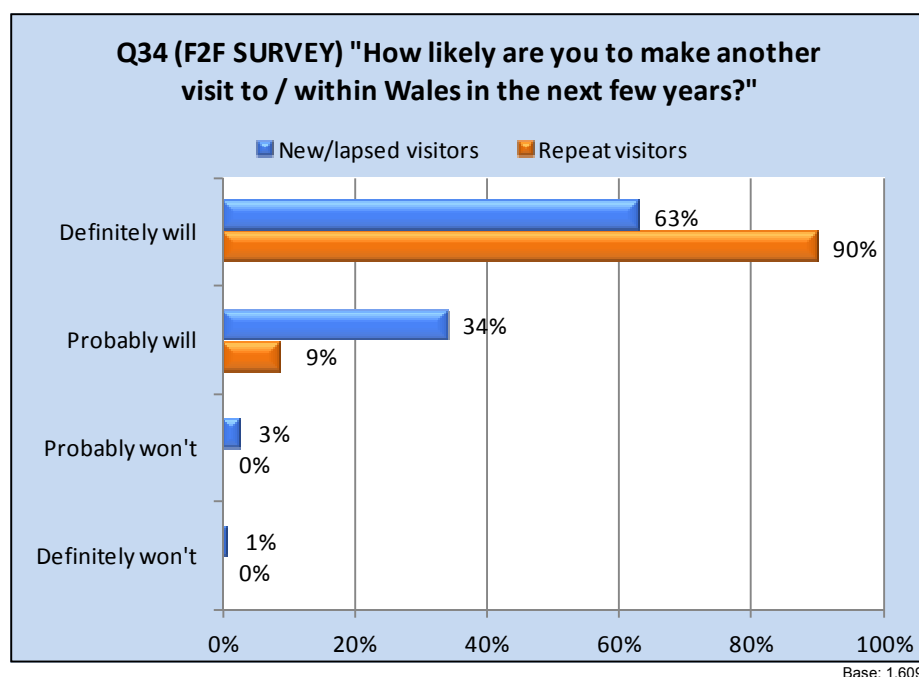
- 4.19 There is a significant difference between what visitors expect before their trip, and what they end up experiencing. It appears that those who are willing to come are pleasantly surprised by what they find.

*"The trip was even more enjoyable than I thought it would be"*  
UK visitor, West Midlands

*"We thought that because the area we were visiting was an old mining community, it would be run down, but we were really pleasantly surprised"*  
UK visitor, East of England

*"Wales is an undiscovered gem. I can't believe more people don't go there"*  
UK visitor, North West

## Likelihood of returning



### Perennial returners

- 4.20 Wales has a large and very loyal base of visitors who return year after year. These faithful returners are crucial to the tourism industry in Wales, especially when the economy is challenging.

*"I always look forward to returning to Wales"*  
UK visitor, Yorkshire

- 4.21 Wales appears to have done well in encouraging the new and lapsed visitors from this year to consider visiting again in the next few years. Of these, about two thirds (63%) say they will 'definitely' return, and about a third (34%) 'probably' will - exactly the same result as in 2011.

*"I enjoyed the trip very much and would love to go back in the future and explore other areas"*  
UK visitor, South East

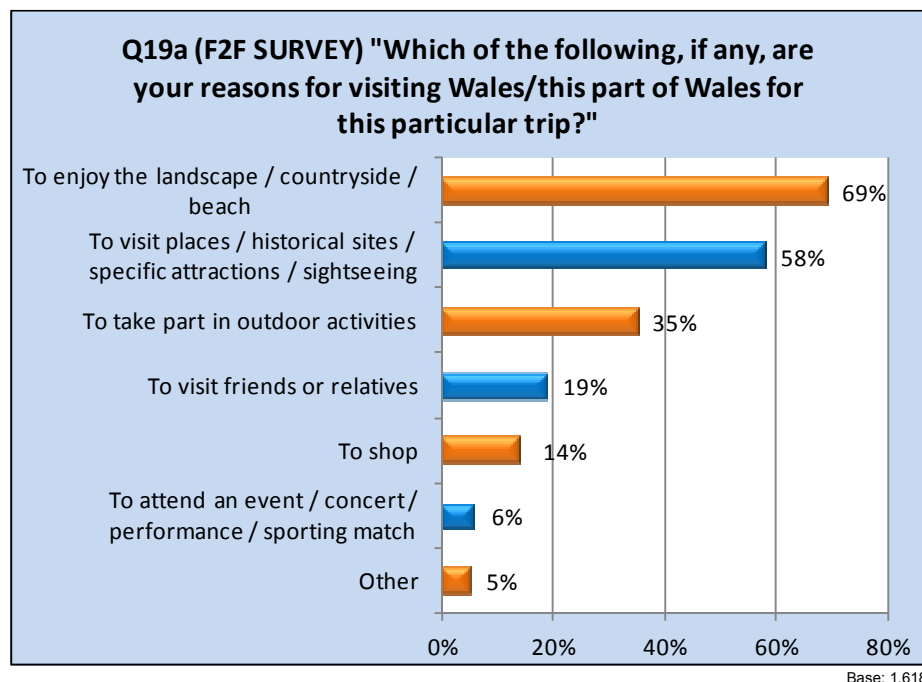
- 4.22 Follow-up with the few answering they won't return soon shows that they are mostly old and live quite far away, and so the lack of intention to return soon is down to practicalities rather than desire.

## **Likelihood of recommending**

- 4.23 The *Information Needs* research has confirmed that recommendations from friends / relatives / colleagues are a very powerful influence on people's decisions to visit a new destination. For some people it's the most powerful influence of all. This makes it all the more important that visitors to Wales share their experience with others - especially as their satisfaction is so high.
- 4.24 Fortunately, nearly all (96%) staying visitors would 'definitely' recommend Wales to a friend or relative. This is a significant support to the marketing that Visit Wales undertakes.

## 5. Motivation for Visiting

### Overview of motivation



### Significant increase in motivation to visit specific attractions / places, and to take part in outdoor activities

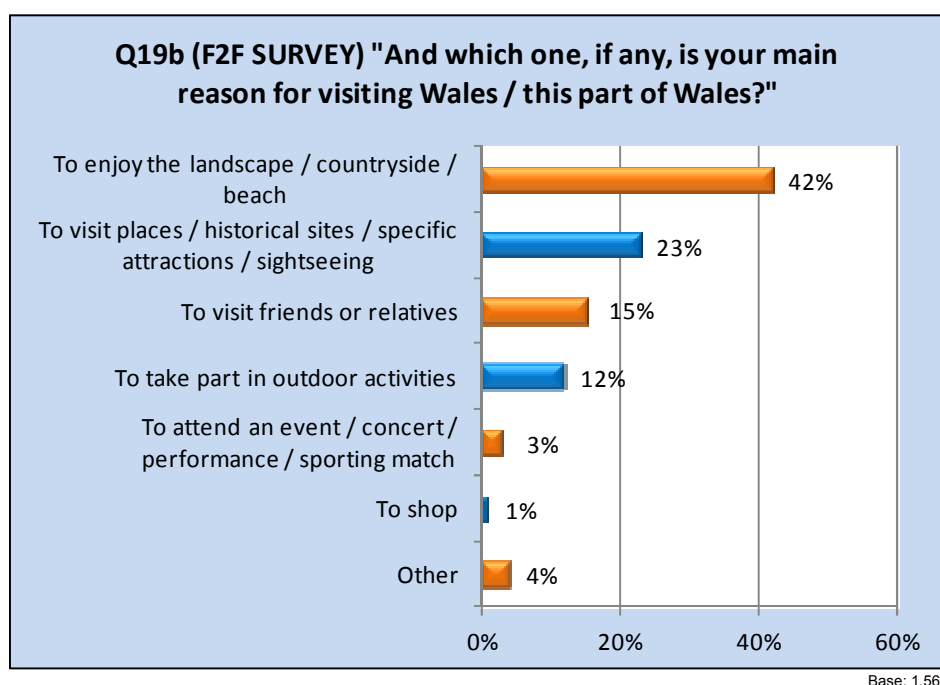
- 5.1 The reason 'to visit places / historical sites / specific attractions / sightseeing' has risen significantly from 38% in 2011 to 58% in 2013. Similarly 'to take part in outdoor activities' has risen significantly from 18% in 2011 to 35% in 2013.
- 5.2 It appears that whilst Wales' natural environment is still the biggest draw of all, visitors are realising that there other things to do in Wales. It is also likely that the dry and sunny weather this summer compared to 2011 has played a significant part in this increase in outdoor activities.

*"We normally don't venture much further than Llandudno but this time we went on a bus trip to Conwy and enjoyed it very much"*  
UK visitor, North West

## South East Wales differs greatly from the other three regions

- 5.3 South East Wales is very different from the other three regions in terms of motivations to visit. VFR (motivation for 30% of visitors), shopping (20%) and 'attending events / concerts / sporting matches' (12%) are much more significant than in the rest of Wales, but on the other hand 'enjoying landscape / countryside / beach' (45%) is much lower than the rest of Wales (79%). The 2011 survey produced a similar finding.

## Main reason for visiting



## Significant increase in visiting specific places / attractions

- 5.4 'To visit places / historical sites etc' has risen significantly as the main reason for visiting Wales from 14% in 2011 to 23% of respondents in 2013. During the same time, 'to enjoy landscape / countryside / beach' has come down a little from 48% in 2011 to 42% in 2013.

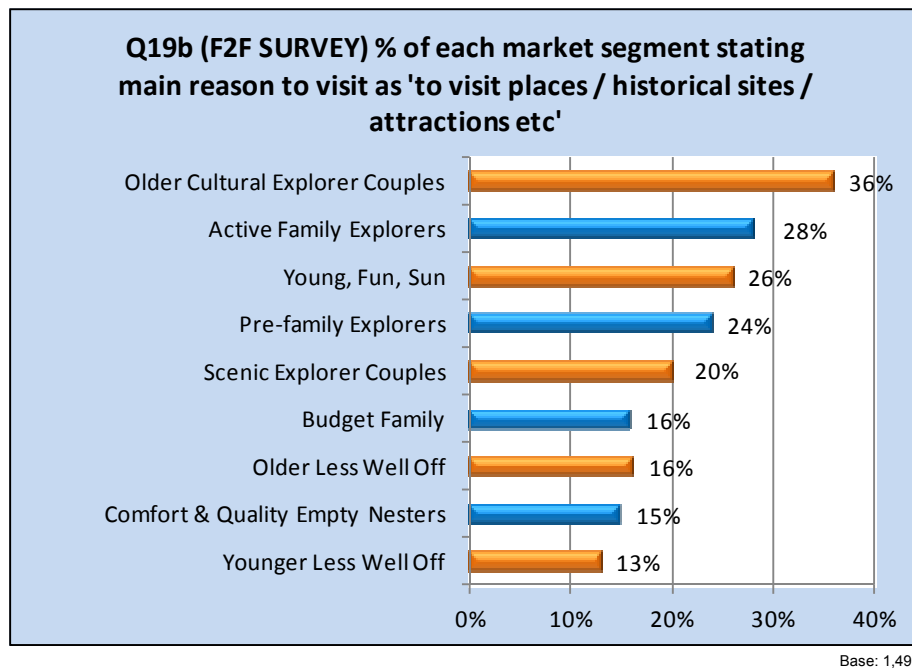
## South East Wales differs greatly from the rest of Wales

- 5.5 As before, South East Wales differs greatly from the other regions in terms of the main motivation from visiting. In the South East, VFR (23% of respondents) and 'attending events / concerts / sports matches' (8%) are more significant than in the



rest of Wales, as is 'visiting places / historical sites etc' (37% say the main reason in SE Wales compared to 17% elsewhere).

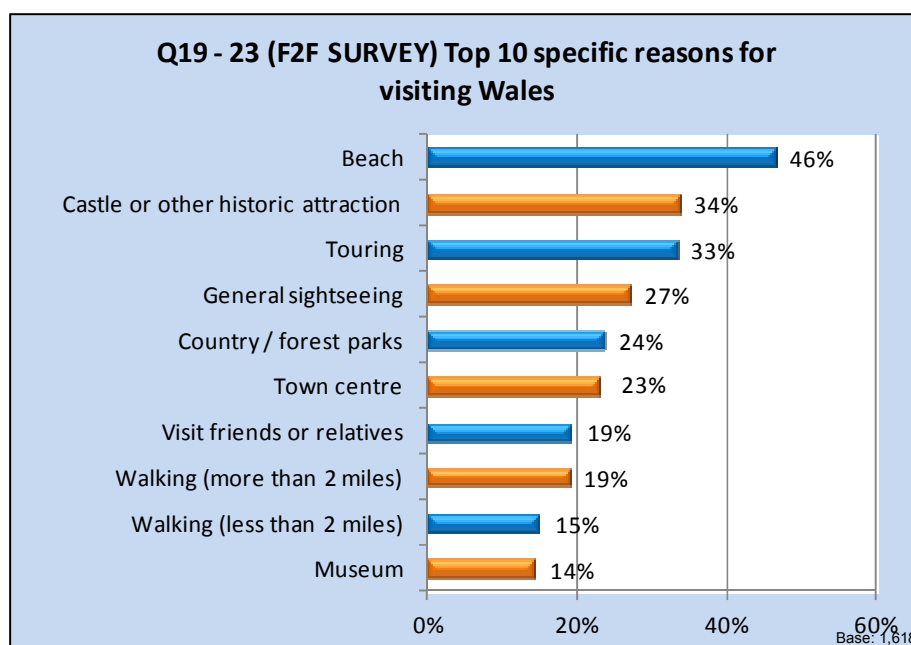
- 5.6 On the other hand, a minority (16%) of visitors to SE Wales state the 'landscape / countryside / beach' as the main reason to visit, compared to a much larger proportion (51%) of those visiting the other parts of Wales. The 2011 research produced a similar finding.



### Differences in main reason to visit Wales by market segment

- 5.7 'Older Cultural Explorer Couples' are the most likely segment to visit Wales 'to visit places / historical sites / attractions' (*shown on the above chart*). Just over a third (36%) state this as their main reason to visit Wales.
- 5.8 The most likely segments to take part in outdoor activities are 'Younger Less Well Off' (20% of visitors state this as their main reason), Active Family Explorers (17%) and Pre-family Explorers (17%).
- 5.9 The 'Young, Fun, Sun' segment is by far the most likely segment to shop as the main reason for visiting (19% of visitors in this segment).

## More detailed reasons for visiting



*In the questionnaire, respondents were asked further questions (Q20 – Q23) relating to broad motivation categories answered in Q19 previously. The above chart brings together the top ten specific reasons for visiting. Full details can be viewed in the cross-tabulations.*

### Didn't need to go abroad to sunbathe this year

5.10 Wales has an impressive coastline of unspoilt beaches, allowing children to play, adults to stroll, and in the fine weather experienced throughout the summer of 2013, even sunbathe. The beach is the most frequently mentioned specific reason for visiting Wales in 2013 by quite a margin.

### Holding the fort

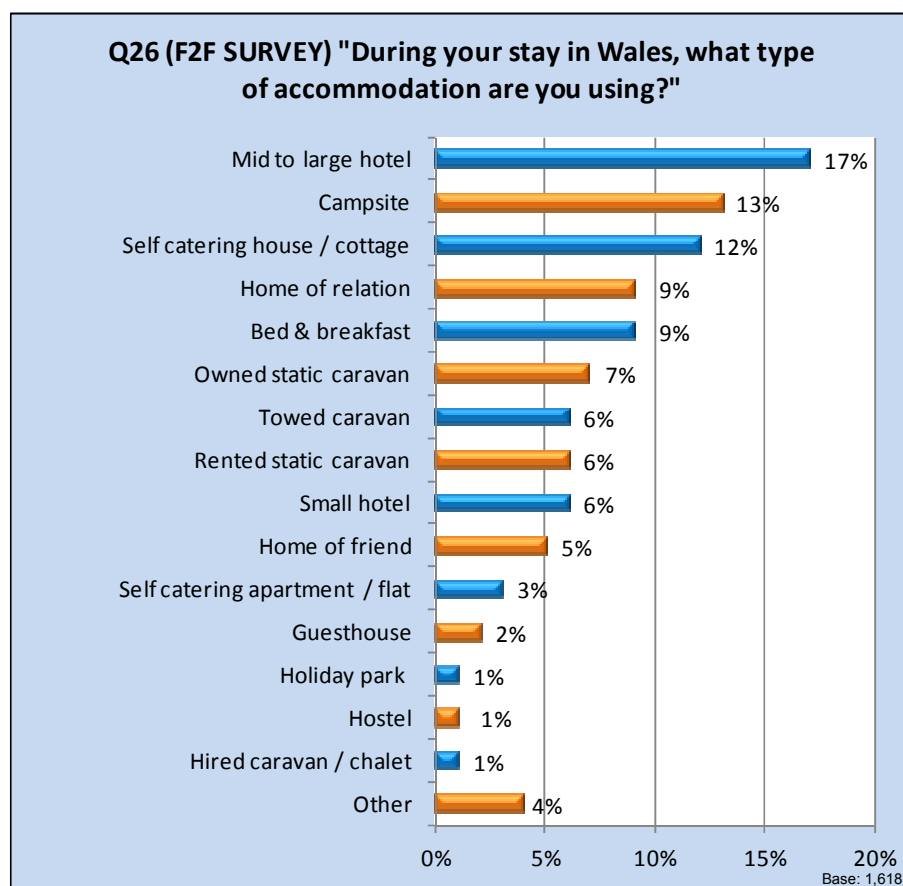
5.11 A significant proportion (34%) of total visitors have visited one of the many castles or historic attractions during their trip.

### Walking by far the most common physical activity

5.12 About one in five (19%) staying visitors have 'walked more than 2 miles' and a further 15% have engaged in walking, but less than 2 miles. Walking is by the far the most common physical activity – the next highest is cycling at 4% of total staying respondents.

## 6. Accommodation and Transport Used

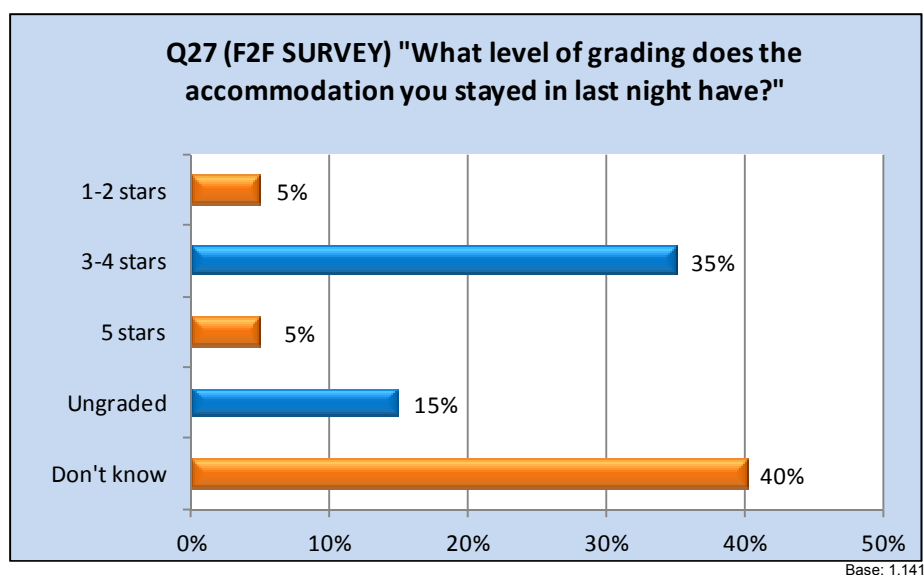
### Accommodation Used



### English visitors more likely to go for cosy options

- 6.1 Wales offers a very diverse range of accommodation options to its visitors, ranging from luxury hotels to sleeping in a field.
- 6.2 UK visitors from outside Wales have a greater preference for the more homely options such as serviced accommodation and self-catering cottages, whereas Welsh residents have a preference for being more adventurous by sleeping in tents and caravans – well over half (56%) of Welsh resident visitors.
- 6.3 Mid to large hotels are more likely the choice of the 'Older Less Well Off' segment (34% of the segment) and 'Older Cultural Explorer Couples' (28% of the segment).
- 6.4 Campsites are more likely the choice of the 'Budget Family' (21% of the segment).

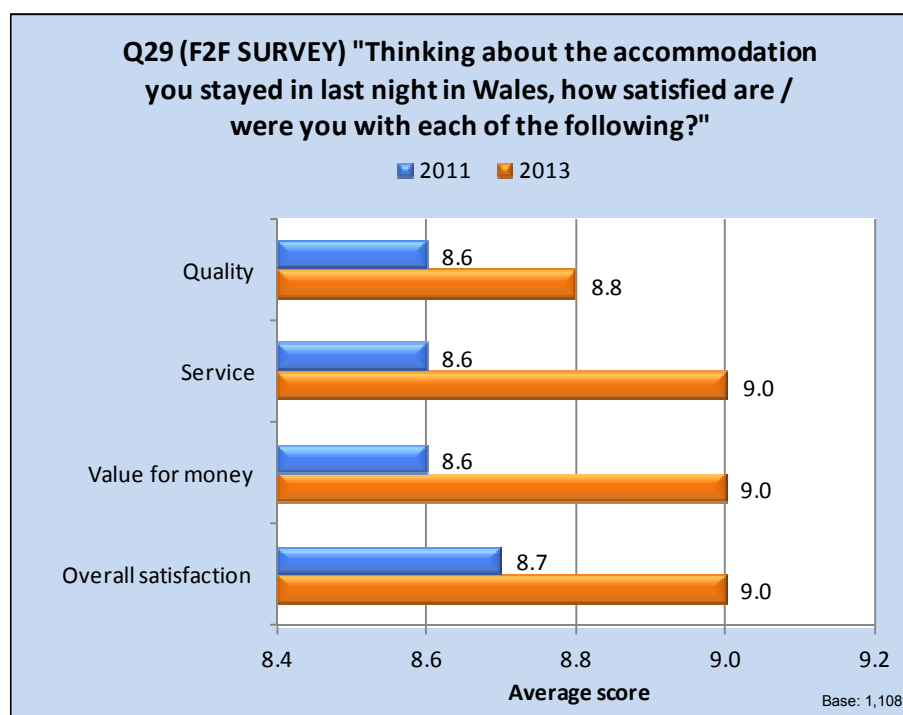
## Star grading of accommodation used



### Mixed awareness of star grading

- 6.5 In 2012 Visit Wales commissioned research into the relative roles of star grading and user-generated content (UGC) sites (e.g. TripAdvisor) in making decisions on accommodation. One of the main findings was that star gradings are still valued by the majority in spite of the rise in UGC usage as they give a reliable benchmark of standard and price. Another finding was that consumers tend to associate star grading with hotels, but much less so with other types of accommodation.
- 6.6 In this survey, a significant proportion (40%) of respondents did not know what level of grading their accommodation had, and a further 15% stayed in ungraded accommodation. However, these respondents are more likely to be found staying in types of accommodation other than hotels.
- 6.7 The spread of visitors by star rating staying in graded accommodation reflects the accommodation stock in Wales quite closely.

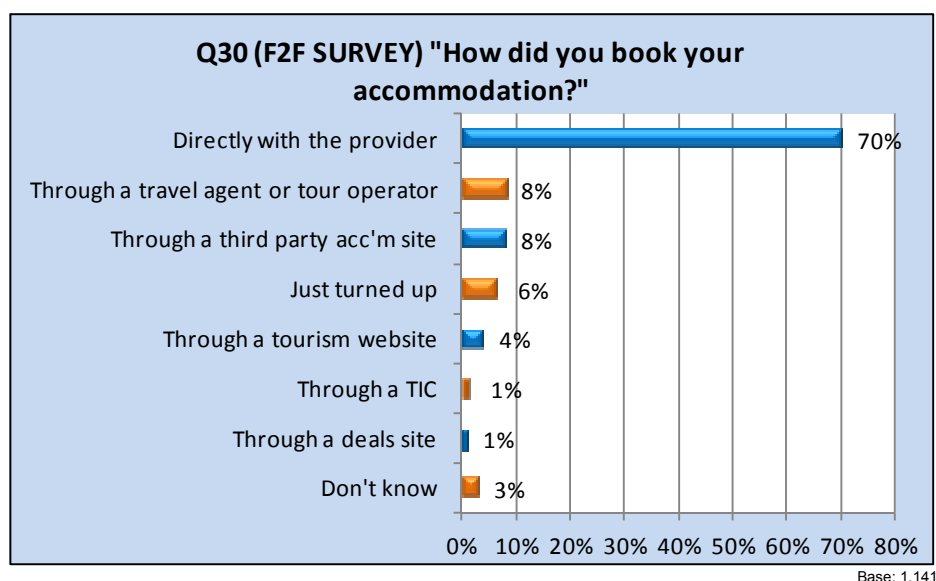
## Satisfaction with accommodation



### Improved satisfaction with accommodation

- 6.8 Visitors rate their accommodation highly on the whole. The average scores are all up on 2011.
- 6.9 Ratings on all aspects are significantly higher in South West Wales (9.3 overall satisfaction) compared to the other regions of Wales (8.9 overall satisfaction).
- 6.10 Differences in overall satisfaction by higher grade (3-5 star), lower grade (1-2 star) and ungraded accommodation are not significant. Differences by type of accommodation and origin of visitors (Wales / UK other) are also not significantly different.
- 6.11 Satisfaction is high across most market segments, but lower among 'Young, Fun, Sun' (8.5 average overall satisfaction).

## Booking accommodation

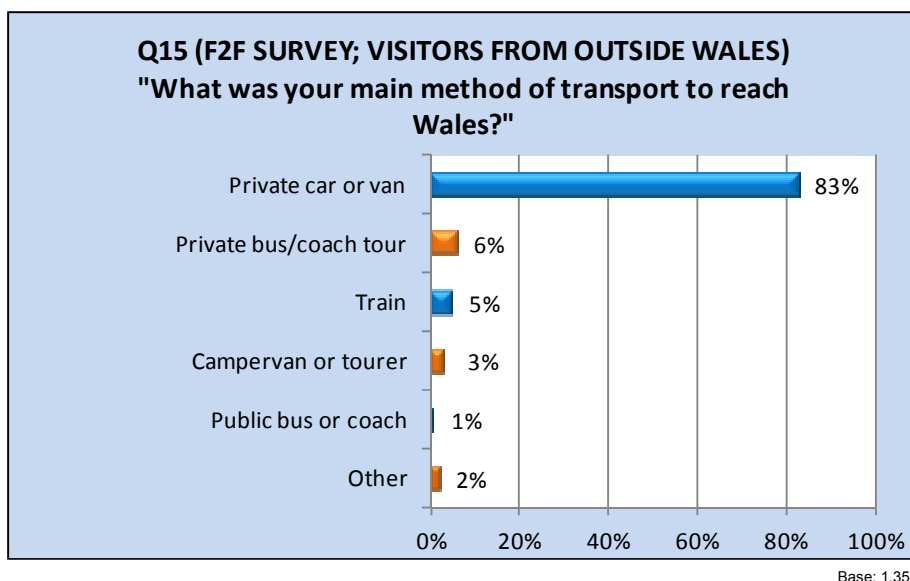


### Wales doesn't do Groupon

- 6.12 Visit Wales' marketing has previously asserted that Wales does 'proper holidays' not package holidays. It seems that it doesn't do Groupon either. Only 1% of respondents booked their accommodation through a deals site.
- 6.13 Whilst other parts of the UK continue to attract deal lovers, it appears from the research that visitors to Wales are perhaps coming for other reasons.
- 6.14 Booking directly with the provider is by far the most popular method of booking accommodation, and this applies to all respondent groups – new/repeat, Wales/UK, region visited etc. A noticeably low proportion (8%) of respondents booked through a third party accommodation site, in spite of the prevalence of such sites in the UK marketplace.



## Transport used to get to Wales

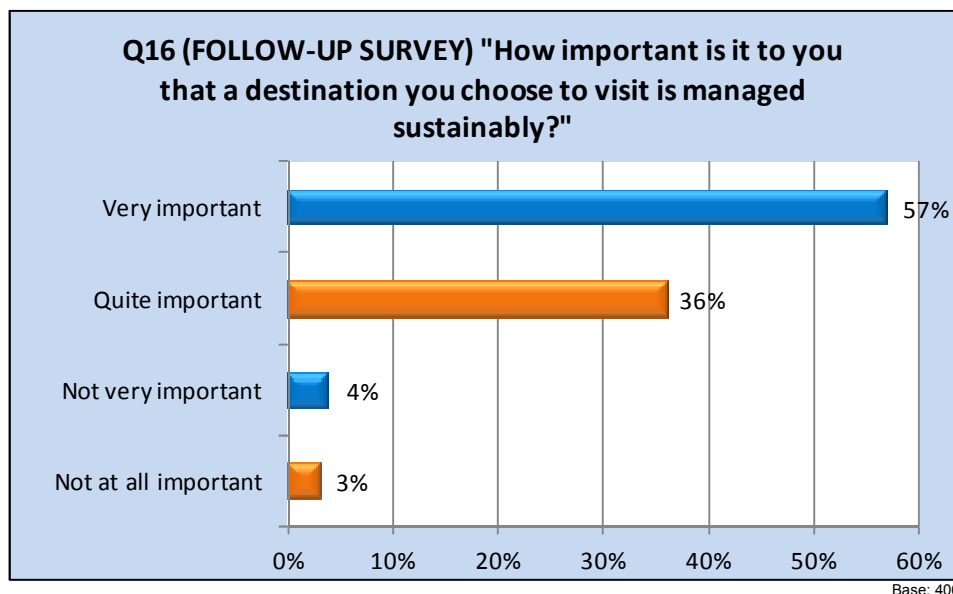


### No significant changes in transport used to reach Wales

- 6.15 The vast majority (83%) of staying visitors coming from outside Wales have used their own car/van to get to Wales. This is very similar to in 2011 (84%).
- 6.16 There are also no significant changes in how visitors have travelled around Wales, with private car/van (84%) still very popular (same as in 2011). Public/bus (4%) and train (3%) are not significantly different from in 2011.
- 6.17 Satisfaction with public transport among those who have used it to get around Wales is unchanged from 2011 at an average of 8.2. The sample is too small to break down further.

## 7. Sustainability

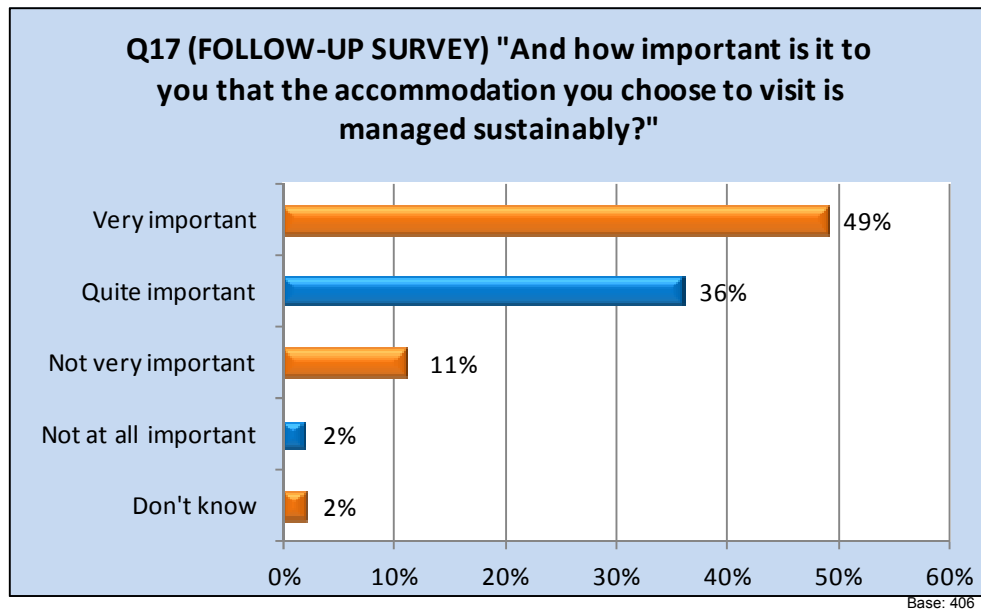
### Attitudes towards sustainable destinations



### Sustainable destination management is important to visitors to Wales

- 7.1 Over half (57%) of staying visitors to Wales believe it is 'very important' that destinations they choose to visit are managed sustainably.
- 7.2 Among Welsh residents, sustainability is particularly important in the mostly rural region of Mid Wales (although the sample size is very low).
- 7.3 Sustainability becomes progressively more important through the age range of visitors, with the over 65's most concerned (71% consider it 'very important'), which compares to a lower proportion (42%) of under 35's considering sustainability to be very important.

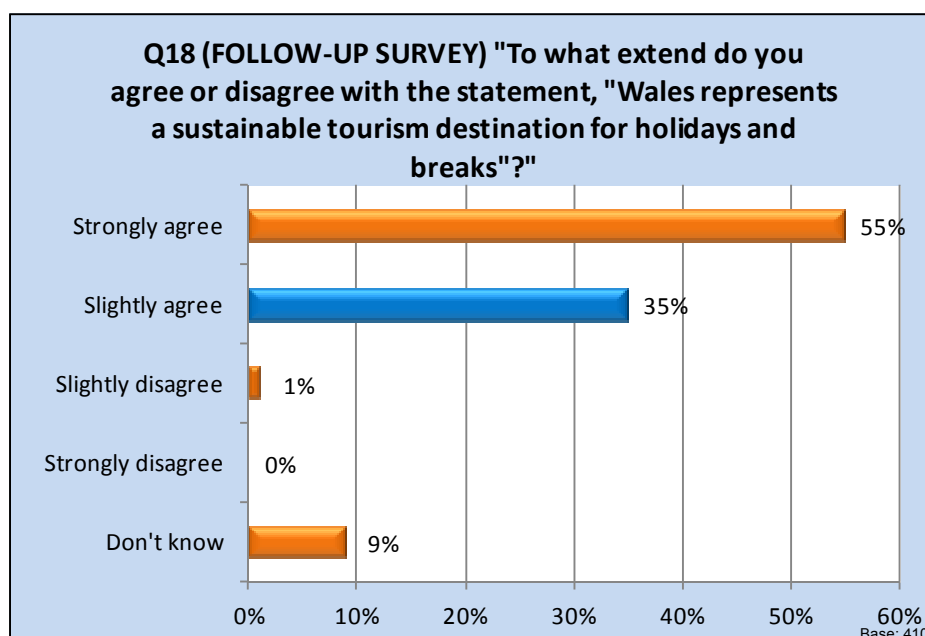
## Sustainable accommodation



### Attitudes correlate closely with age

- 7.4 Sustainable management of accommodation becomes increasingly important with age. Two in three (67%) over 65's consider the issue to be 'very important', compared to a lower proportion (35%) of under 35's.

## Opinions of Wales' sustainability as a destination



### Opinions of Wales' sustainability are highest among those to whom it matters the most

- 7.5 Wales is seen by most as a sustainable destination. Most importantly, the strongest agreement is among those to whom sustainability matters the most. Of those answering it is 'very important' that a destination they choose to visit is managed sustainably, the vast majority (77%) 'strongly agree' that Wales meets that requirement.
- 7.6 About two thirds (64%) of over 65's 'strongly agree' with the above statement, compared to around half (47%) of under 35's.

## 8. Implications for Visit Wales

- 8.1 What is the UK Staying Visitor Survey telling us? Below we conclude with the main implications for Visit Wales and partners.

### Attracting new and lapsed visitors to Wales

#### Advocacy is key

- 8.2 Satisfaction with trips to Wales is extremely high – demonstrated both in the quantified ratings and in the enthusiastic way in which people talk about Wales when being interviewed. At the same time, the *Information Needs* research has confirmed that recommendations and shared experiences from friends / relatives / colleagues are one of the most powerful influences on new destination choice, and for some, it is the most powerful influence.
- 8.3 Anything which Visit Wales can do to encourage advocacy among visitors will have a significant impact on attracting new and lapsed visitors to Wales. Photos are very influential; visitors now tend to share photos and experiences either on their phone or on social networking sites during and post-trip – this now appears to be more common than sending postcards and passing around a wallet of printed photos.

#### Quality of the natural environment and friendly people are the USPs

- 8.4 The quality of Wales' natural environment and the friendliness of the people are, from visitors' ratings and comments, clearly the two outstanding reasons to visit Wales.

#### Older couples and families with young children are most easily attracted to Wales

- 8.5 Older couples and families with young children remain the Welsh tourism industry's 'bread and butter' markets. These two markets may well be the easiest to explore in terms of attracting new visitors because the destination holds a natural appeal.
- 8.6 Whether to actively promote to younger couples and families with older children is a decision for the marketing team, but these groups are probably less easily converted into visitors unless the product changes.

## **Wales does not need to cheapen itself**

- 8.7 Whilst other parts of the UK have gone a bit 'deal mad' over the past few years, Wales appears not to be attracting visitors through third party deals. With improvements in accommodation satisfaction ratings, the Welsh tourism industry does not need to go down the route of 'giving away' a high quality experience.

## **Product development and visitor experience**

### **Commercial aspects need improving**

- 8.8 The commercial aspects of the Wales tourism product need improving, as long as that does not compromise the 'getting away from it all' feeling that many visitors to Wales seek.

### **Sustainability is hitting the mark**

- 8.9 Opinions of Wales' sustainability are highest among those to whom it matters the most. The sustainable development work being undertaken Wales is being recognised and appreciated by visitors.

### **Motivations for visiting have become more varied**

- 8.10 The significant increases in visitors coming to visit places / attractions or to take part in outdoor activities show that people have become more aware of what Wales to offer. At the same time, trip satisfaction has risen and so there are strong prospects of these visitors returning to do more.

## **Welsh residents**

### **North Wales residents head south but not vice versa**

- 8.11 Some North Wales residents are making the effort to travel to the South East, but this is not reciprocated. Encouraging visitor flow from South to North would mean improved roads, overcoming a perceived cultural barrier, and conviction that the journey is more worthwhile than to easily reached parts of southern England.

## Appendix 1 - Sampling Locations for Face to Face Survey

### **NORTH WALES**

#### **Anglesey**

Beaumaris town  
centre  
Anglesey Sea Zoo

#### **Conwy**

Conwy town centre  
Betws-y-Coed  
Llandudno  
Promenade

#### **Denbighshire**

Llangollen town  
centre  
Rhyl Promenade

#### **Flintshire**

Wepre Country Park

#### **Gwynedd**

Caernarfon town  
centre  
Porthmadog town  
centre  
Llanberis

#### **Wrexham**

Erddig  
Wrexham town  
centre  
Pontcysyllte  
Aqueduct

### **MID WALES**

#### **Ceredigion**

Aberystwyth  
Promenade  
Aberaeron  
New Quay  
Devil's Bridge  
Cardigan town centre

#### **Powys**

Welshpool town  
centre  
Storey Arms  
Brecon town centre  
Elan Valley Visitor

Centre

Powis Castle

### **SOUTH WALES**

#### **Blaenau Gwent**

Bryn Bach Park

#### **Bridgend**

Porthcawl  
Promenade

#### **Caerphilly**

Caerphilly Castle  
Cwmcarn  
Llancaiach Fawr

#### **Cardiff**

Cardiff Castle  
Millennium Centre/  
Bay  
St Fagans: National  
History Museum  
National Museum  
Cardiff

#### **Merthyr Tydfil**

Brecon Mountain  
Railway

#### **Monmouthshire**

Tintern Abbey  
Chepstow town  
centre

#### **Newport**

Tredegar House  
Caerleon Roman  
Baths

#### **Rhondda Cynon**

##### **Taff**

Rhondda Heritage  
Park  
Dare Valley

#### **Torfaen**

Blaenafon Iron  
Works  
Big Pit

#### **Vale of Glamorgan**

Cosmeston Country  
Park  
Barry Island Seafront

### **WEST WALES**

#### **Carmarthenshire**

National Botanic  
Gardens of Wales  
Pembrey Country  
Park  
Newton House,  
Dinefwr

#### **Neath Port Talbot**

Aberdulais Falls  
Afan Forest Park  
Margam Park

#### **Pembrokeshire**

St Davids town  
centre  
Fishguard town  
centre  
Tenby town centre

#### **Swansea**

Waterfront Museum  
Rhossili, Gower

# Visit Wales 2013 Visitor Survey (Main)

## Main face to face survey

Good morning/afternoon. My name is ... from Strategic Marketing, an independent research agency working on behalf of Visit Wales. We are conducting a short survey of visitors here today. Could you spare me a few minutes to answer some quick questions about your visit? Everything you say will be kept confidential.

### INTERVIEWER QUESTIONS

#### A Day of interview

Monday ..... ☐      Wednesday ..... ☐      Friday ..... ☐      Sunday ..... ☐  
Tuesday ..... ☐      Thursday ..... ☐      Saturday ..... ☐

#### B Location of Interview (If you are at an attraction, please specify attraction or if you are interviewing in a town centre, please specify name of town)

#### C Start time of interview (Please record exact time)

### FILTER QUESTIONS

(IF 'CLOSE INTERVIEW' - THIS DOES NOT COUNT AS A COMPLETED SURVEY)

#### Q1 First of all, would you like to take part in this survey in English or Welsh? (Tick one box only)

English ..... ☐      Welsh ..... ☐

#### Q2 SHOWCARD A

Which of these best describes the reason for your trip here today? (Tick one box only)

Part of a holiday, **staying** in Wales away from home ..... ☐ Go to Q4  
Part of a holiday to visit friends or relatives, **staying** in Wales away from home ..... ☐ Go to Q4  
**Day** visit to/in Wales - for day trip / outing or non-routine shopping ..... ☐ Go to Q3  
Day visit to / in Wales - for routine appointment or routine shopping ..... ☐ Thank and close interview  
On business ..... ☐ Thank and close interview  
For study ..... ☐ Thank and close interview  
Other ..... ☐ Thank and close interview

#### Q3 (DAY VISITORS) Can I just check, will you be spending three hours or more away from home or your accommodation as part of your visit today - including travel? (Tick one box only)

Yes ..... ☐ Go to Q7      No ..... ☐ Thank and close interview



**Q4 (STAYING VISITORS) How many nights in total will you be staying in Wales away from home as part of your trip? (Tick one box only)**

- |         |                                   |                   |                                   |
|---------|-----------------------------------|-------------------|-----------------------------------|
| 1 ..... | <input type="checkbox"/> Go to Q5 | 5 .....           | <input type="checkbox"/> Go to Q6 |
| 2 ..... | <input type="checkbox"/> Go to Q5 | 6 .....           | <input type="checkbox"/> Go to Q6 |
| 3 ..... | <input type="checkbox"/> Go to Q5 | 7 .....           | <input type="checkbox"/> Go to Q6 |
| 4 ..... | <input type="checkbox"/> Go to Q6 | More than 7 ..... | <input type="checkbox"/> Go to Q6 |
- (If more than 7) Please specify how many nights

**Q5 (STAYING FEWER THAN 4 NIGHTS) How many nights have you stayed in Wales away from home so far? (Tick one box only)**

- |            |  |         |                                   |
|------------|--|---------|-----------------------------------|
| None ..... | <input type="checkbox"/> Thank and close interview | 2 ..... | <input type="checkbox"/> Go to Q7 |
| 1 .....    | <input type="checkbox"/> Go to Q7                  | 3 ..... | <input type="checkbox"/> Go to Q7 |

**Q6 (STAYING 4 OR MORE NIGHTS) How many nights have you stayed in Wales away from home so far? (Tick one box only)**

- |            |  |                 |                                   |
|------------|--|-----------------|-----------------------------------|
| None ..... | <input type="checkbox"/> Thank and close interview | 2 or more ..... | <input type="checkbox"/> Go to Q7 |
| 1 .....    | <input type="checkbox"/> Thank and close interview |                 |                                   |

## MAIN SURVEY

**Q7 (ALL RESPONDENTS) What is your main country of residence? (Tick one box only)**

- |                          |                          |                   |                          |                            |                          |
|--------------------------|--------------------------|-------------------|--------------------------|----------------------------|--------------------------|
| Wales.....               | <input type="checkbox"/> | Netherlands ..... | <input type="checkbox"/> | Canada .....               | <input type="checkbox"/> |
| UK outside Wales .....   | <input type="checkbox"/> | Belgium.....      | <input type="checkbox"/> | Australia.....             | <input type="checkbox"/> |
| Republic of Ireland..... | <input type="checkbox"/> | Spain .....       | <input type="checkbox"/> | Europe other.....          | <input type="checkbox"/> |
| France .....             | <input type="checkbox"/> | Italy.....        | <input type="checkbox"/> | Outside Europe other ..... | <input type="checkbox"/> |
| Germany.....             | <input type="checkbox"/> | USA .....         | <input type="checkbox"/> |                            |                          |

Please specify other country in Europe

Please specify other country outside Europe

**Q8 (IF WALES, i.e. Q7= Wales) In which local authority area do you live? (Tick one box only)**

- |                      |                          |                         |                          |                          |                          |
|----------------------|--------------------------|-------------------------|--------------------------|--------------------------|--------------------------|
| Anglesey.....        | <input type="checkbox"/> | Denbighshire .....      | <input type="checkbox"/> | Powys.....               | <input type="checkbox"/> |
| Blaenau Gwent .....  | <input type="checkbox"/> | Flintshire .....        | <input type="checkbox"/> | Rhondda Cynon Taff ..... | <input type="checkbox"/> |
| Bridgend .....       | <input type="checkbox"/> | Gwynedd .....           | <input type="checkbox"/> | Swansea.....             | <input type="checkbox"/> |
| Caerphilly.....      | <input type="checkbox"/> | Merthyr Tydfil.....     | <input type="checkbox"/> | Torfaen .....            | <input type="checkbox"/> |
| Cardiff.....         | <input type="checkbox"/> | Monmouthshire.....      | <input type="checkbox"/> | Vale of Glamorgan.....   | <input type="checkbox"/> |
| Ceredigion .....     | <input type="checkbox"/> | Neath Port Talbot ..... | <input type="checkbox"/> | Wrexham .....            | <input type="checkbox"/> |
| Carmarthenshire..... | <input type="checkbox"/> | Newport .....           | <input type="checkbox"/> | Don't know .....         | <input type="checkbox"/> |
| Conwy.....           | <input type="checkbox"/> | Pembrokeshire .....     | <input type="checkbox"/> |                          |                          |

(If don't know) Please write in postcode or name of town/village

**Q9** (VISITORS FROM OUTSIDE WALES, i.e. Q7 not Wales) Is this your first visit to Wales?  
(Tick one box only)

Yes ..... ☐ Don't know / can't remember ..... ☐  
No ..... ☐

**Q10** (VISITORS FROM WALES, i.e. Q7= Wales) Is this your first visit to this part of Wales?  
(Tick one box only)

Yes ..... ☐ Don't know / can't remember ..... ☐  
No ..... ☐

**Q11** (STAYING VISITORS, i.e. Q2=code 1 or 2) Including this visit, how many times in the last three years have you taken a leisure break or holiday in Wales? (Tick one box only)

First time in three years ..... ☐ 7 - 10 times ..... ☐  
2 - 3 times ..... ☐ More than 10 times ..... ☐  
4 - 6 times ..... ☐ Don't know / can't remember ..... ☐

**Q12** (DAY VISITORS, i.e. Q2=code 3) Including this visit, how many times in the last year have you taken a day trip in/to Wales? (Tick one box only)

First time in three years ..... ☐ 11 - 20 times ..... ☐  
2 - 3 times ..... ☐ More than 20 times ..... ☐  
4 - 6 times ..... ☐ Don't know / can't remember ..... ☐  
7 - 10 times ..... ☐ N/A - live in Wales ..... ☐

**Q13** SHOWCARD B

(STAYING VISITORS, i.e. Q2=code 1 or 2) What type of trip are you on? (Tick one box only)

Main holiday of the year ..... ☐ Other ..... ☐  
Secondary / additional holiday ..... ☐ Don't know ..... ☐  
Short break ..... ☐

**Q14** (OVERSEAS VISITORS ONLY, i.e. Q7 not UK or Wales) What was your main method of transport to reach Britain? (Please specify transport)

Train (incl. Channel Tunnel) .....	
Ferry - car passenger (specify arrival port).....	
Ferry - foot passenger (specify arrival port).....	
Plane (specify arrival airport).....	
Other (please specify) .....	

**Q15**

**What was your main method of transport to reach Wales? (Tick one box only)**

**What method(s) of transport have you used to get around Wales during your trip / to get here today? (Tick all that apply)**

*Travel to Wales*  
(TICK ONE BOX ONLY)

*Travel around Wales*  
(TICK ALL THAT APPLY)

Private car or van ☐Hired car or van ☐

Train (if 'Travel around Wales' please ask Q18)

Public bus or coach (if **'Travel around Wales'** please ask Q18)

Private bus/coach excursion/tour ☐Bike ☐Motorbike ☐On foot ☐Taxi ☐

Water taxi or bus	
-------------------	--

Boat or yacht ☐

Campervan or tourer ☐

Plane (please specify at Q16) 

Other (please specify at Q17) ☐

**Q16 (IF PLANE AT Q15) Please specify arrival airport**

--

**Q17 (IF OTHER TRANSPORT METHOD USED AT Q15) Please specify other transport method**

--

**Q18 (ALL WHO USED TRAIN, PUBLIC BUS OR PUBLIC COACH AROUND WALES AT Q15)**

**Overall how satisfied are you with the public transport you've used, taking into account availability and choice, service provided, value for money, and information availability? Please use a scale of 1 - 10 where 1 = very dissatisfied and 10 = very satisfied. (Tick one box only)**

Overall satisfaction

Q19

**SHOWCARD C (ALL RESPONDENTS)**

Which of the following, if any, are your reasons for visiting Wales / this part of Wales for this particular trip? *(Tick all that apply)*

And which one, if any, is your main reason for visiting Wales / this part of Wales? *(Tick one box only)*

	<i>All reasons (TICK ALL THAT APPLY)</i>	<i>Main reason (TICK ONE BOX ONLY)</i>
To take part in outdoor activities (e.g. walking, cycling, fishing etc) <b>(follow up question at Q20)</b>	<input type="checkbox"/>	<input type="checkbox"/>
To attend an event / concert / performance / sporting match <b>(follow up question at Q21)</b>	<input type="checkbox"/>	<input type="checkbox"/>
To enjoy the landscape / countryside / beach <b>(follow up question at Q22)</b>	<input type="checkbox"/>	<input type="checkbox"/>
To visit places / historical sites / specific attractions / sightseeing <b>(follow up question at Q23)</b>	<input type="checkbox"/>	<input type="checkbox"/>
To shop	<input type="checkbox"/>	<input type="checkbox"/>
To visit friend or relatives (including also special events such as weddings)	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

Q20

**SHOWCARD D**

**(IF ANY REASON IS TO TAKE PART IN OUTDOOR ACTIVITIES AT Q19)**

Which of the following, if any, have you or will you take part in? *(Tick all that apply)*

Walking (less than 2 miles).....	<input type="checkbox"/>	Golf .....	<input type="checkbox"/>
Walking (more than 2 miles).....	<input type="checkbox"/>	Horse riding / pony trekking.....	<input type="checkbox"/>
Cycling .....	<input type="checkbox"/>	Adventure sports .....	<input type="checkbox"/>
Mountain biking .....	<input type="checkbox"/>	Water sports .....	<input type="checkbox"/>
Fishing - sea .....	<input type="checkbox"/>	Canal / boating trip .....	<input type="checkbox"/>
Fishing - course / game .....	<input type="checkbox"/>	Other.....	<input type="checkbox"/>
Please specify other			

Q21

**SHOWCARD E**

**(IF ANY REASON IS TO ATTEND AN EVENT / CONCERT / PERFORMANCE / SPORTING MATCH AT Q19)**

Which of the following have you or will you attend? *(Tick all that apply)*

Sports match .....	<input type="checkbox"/>	Music festival .....	<input type="checkbox"/>
Concert .....	<input type="checkbox"/>	Food fair .....	<input type="checkbox"/>
Theatre performance .....	<input type="checkbox"/>	Other.....	<input type="checkbox"/>
Arts / cultural festival .....	<input type="checkbox"/>		
Please specify other			

## SHOWCARD F

**Which of the following, if any, have you done or will you do? (Tick all that apply)**

<i>Touring</i> .....	<input type="text"/>
<i>Wildlife watching</i> .....	<input type="text"/>
<i>Other</i> .....	<input type="text"/>

## SHOWCARD G

**Which of the following, if any, have you or will you visit? (Tick all that apply)**

7) <i>Nature-based attraction (e.g. gardens)</i> .....	<input type="checkbox"/>
8) <i>Science/technology centre</i> .....	<input type="checkbox"/>
9) <i>Steam/heritage railway</i> .....	<input type="checkbox"/>
10) <i>Theme park</i> .....	<input type="checkbox"/>
<i>Town centre</i> .....	<input type="checkbox"/>
<i>General sightseeing</i> .....	<input type="checkbox"/>
<i>Other</i> .....	<input type="checkbox"/>

(IF VISITED ANY ATTRACTION, i.e. Q23=code 1 to 10) Thinking about the attractions you have visited during your trip in Wales, how satisfied are you with the following aspects? Please use a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied. (Tick one box only)

[illegible]

**(ALL RESPONDENTS) How satisfied are you with the following aspects of your visit to date?**  
Please use a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied. *(Tick one box only)*

[illegible]

Q26

## SHOWCARD H

**(STAYING VISITORS, i.e. Q2=code 1 or 2) During your stay in Wales, what type of accommodation are you using? (If more than one type, please tick the one stayed in last night) (Tick one box only)**

- |   |                          |           |
|---|--------------------------|-----------|
| Mid to large hotel (more than 10 rooms) ..... | <input type="checkbox"/> | Go to Q27 |
| Small hotel (10 rooms or smaller) .....       | <input type="checkbox"/> | Go to Q27 |
| Guesthouse .....                              | <input type="checkbox"/> | Go to Q27 |
| Bed & breakfast .....                         | <input type="checkbox"/> | Go to Q27 |
| Farmhouse .....                               | <input type="checkbox"/> | Go to Q27 |
| Self catering apartment/flat .....            | <input type="checkbox"/> | Go to Q27 |
| Self catering house/cottage .....             | <input type="checkbox"/> | Go to Q27 |
| Hired caravan/chalet .....                    | <input type="checkbox"/> | Go to Q27 |
| Campsite .....                                | <input type="checkbox"/> | Go to Q27 |
| Hostel .....                                  | <input type="checkbox"/> | Go to Q27 |
| University accommodation .....                | <input type="checkbox"/> | Go to Q27 |
| Holiday park (not in a caravan) .....         | <input type="checkbox"/> | Go to Q27 |
| Rented static caravan .....                   | <input type="checkbox"/> | Go to Q27 |
| Owned static caravan .....                    | <input type="checkbox"/> | Go to Q32 |
| Towed caravan .....                           | <input type="checkbox"/> | Go to Q32 |
| Home of friend .....                          | <input type="checkbox"/> | Go to Q32 |
| Home of relation .....                        | <input type="checkbox"/> | Go to Q32 |
| Other .....                                   | <input type="checkbox"/> | Go to Q32 |

Q27

## SHOWCARD I

**(STAYING VISITORS i.e. Q2=code 1 or 2 AND Q26=codes 1 to 13) What level of grading does the accommodation you stayed in last night have? (Tick one box only)**

- |                   |                          |                  |                          |
|-------------------|--------------------------|------------------|--------------------------|
| 1 - 2 stars ..... | <input type="checkbox"/> | Ungraded .....   | <input type="checkbox"/> |
| 3 - 4 stars ..... | <input type="checkbox"/> | Don't know ..... | <input type="checkbox"/> |
| 5 stars .....     | <input type="checkbox"/> |                  |                          |

Q28

**(STAYING VISITORS i.e. Q2=code 1 or 2 AND Q26=codes 1 to 13) Where did you stay last night? (Help to code the answer below; if the local authority is not known, please write the name of the town or village) (Tick one box only)**

- |   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| Anglesey .....  | <input type="checkbox"/> | Monmouthshire .....      | <input type="checkbox"/> |
| Blaenau Gwent .....                                     | <input type="checkbox"/> | Neath Port Talbot .....  | <input type="checkbox"/> |
| Bridgend .....  | <input type="checkbox"/> | Newport .....            | <input type="checkbox"/> |
| Caerphilly .....  | <input type="checkbox"/> | Pembrokeshire .....      | <input type="checkbox"/> |
| Cardiff .....   | <input type="checkbox"/> | Powys .....              | <input type="checkbox"/> |
| Ceredigion .....  | <input type="checkbox"/> | Rhondda Cynon Taff ..... | <input type="checkbox"/> |
| Carmarthenshire .....                                   | <input type="checkbox"/> | Swansea .....            | <input type="checkbox"/> |
| Conwy .....   | <input type="checkbox"/> | Torfaen .....            | <input type="checkbox"/> |
| Denbighshire .....                                      | <input type="checkbox"/> | Vale of Glamorgan .....  | <input type="checkbox"/> |
| Flintshire .....  | <input type="checkbox"/> | Wrexham .....            | <input type="checkbox"/> |
| Gwynedd .....   | <input type="checkbox"/> | Don't know .....         | <input type="checkbox"/> |
| Merthyr Tydfil .....                                    | <input type="checkbox"/> |                          |                          |
| (If don't know) Please write in name of town or village |                          | <input type="text"/>     |                          |

**Q29 (STAYING VISITORS i.e. Q2=code 1 or 2 AND Q26=codes 1 to 13) Thinking about the accommodation you stayed in last night in Wales, how satisfied are/were you with each of the following? Please use a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied. (Tick one box only)**

	1	2	3	4	5	6	7	8	9	10	n/a
Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q30 (STAYING VISITORS i.e. Q2=code 1 or 2 AND Q26=codes 1 to 13) How did you book your accommodation? (Tick one box only)**

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

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

Through a deals site (e.g. groupon, kgb)..... ☐

Through a tourism website..... ☐

Through a travel agent or tour operator..... ☐

Through a tourist information centre..... ☐

Just turned up..... ☐

Don't know..... ☐

**Q31 (ALL RESPONDENTS) In planning your trip in / to Wales, did you use online information sources, offline, or both? (Tick one box only)**

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..... ☐

**Q32 (ALL RESPONDENTS) Do you or any members of your party have access to the internet via a mobile phone or other handheld device while on your trip in Wales? (Tick one box only)**

Yes..... ☐ Go to Q33

No..... ☐ Go to Q34

Don't know..... ☐ Go to Q34

**Q33 (IF INTERNET ACCESS, i.e. Q32=yes) And have you accessed the internet via your mobile / handheld device to find things out during this trip? (Tick one box only)**

Yes..... ☐

No..... ☐

Don't know..... ☐

**Q34 (ALL RESPONDENTS) How likely are you to make another visit to / within Wales in the next few years? (Tick one box only)**

Definitely will .....	<input type="checkbox"/>
Probably will .....	<input type="checkbox"/>
Probably won't .....	<input type="checkbox"/>
Definitely won't .....	<input type="checkbox"/>

**Q35 SHOWCARD J**

**(ALL RESPONDENTS) Thinking about your typical domestic holiday and/or short break destination, please select the top 5 most important considerations: (Tick MAXIMUM of 5 boxes only)**

Ease of getting there .....	<input type="checkbox"/>	Beautiful coastline / beaches .....	<input type="checkbox"/>
Ease of getting around when there .....	<input type="checkbox"/>	Beautiful unspoilt countryside .....	<input type="checkbox"/>
Short travel time .....	<input type="checkbox"/>	A large range of activities .....	<input type="checkbox"/>
Safety and security .....	<input type="checkbox"/>	Good nightlife .....	<input type="checkbox"/>
Good value for money when there .....	<input type="checkbox"/>	Must see' attractions .....	<input type="checkbox"/>
Good value for money getting there .....	<input type="checkbox"/>	Ideal for families .....	<input type="checkbox"/>
Offers good promotions/special deals .....	<input type="checkbox"/>	Trendy destination .....	<input type="checkbox"/>
Good weather .....	<input type="checkbox"/>	Provides entertainment for everyone in your party .....	<input type="checkbox"/>
Good quality accommodation .....	<input type="checkbox"/>	Good for shopping .....	<input type="checkbox"/>
Good range of accommodation .....	<input type="checkbox"/>	Good range of historical attractions .....	<input type="checkbox"/>
Good deals on accommodation .....	<input type="checkbox"/>	People are friendly and welcoming .....	<input type="checkbox"/>
Good quality food .....	<input type="checkbox"/>	Good range of events and festivals .....	<input type="checkbox"/>
Good range of food .....	<input type="checkbox"/>	Lots of things to do in all weather .....	<input type="checkbox"/>
Beautiful scenery .....	<input type="checkbox"/>	It has interesting towns and cities .....	<input type="checkbox"/>

**Q36 (ALL RESPONDENTS) Now we are going to show you two general statements that other people have mentioned about their attitude to life in general. Please tell me how much you agree or disagree with them, using a scale of 1 - 7 where 1 means completely disagree and 7 is strongly agree. (Tick one box only)**

	1	2	3	4	5	6	7	n/a
I like to learn about the local way of life and culture of the places I visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When I go on holiday I only want to eat, drink and lie in the sun	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q37 (ALL RESPONDENTS) How frequently do you typically go on a camping / caravanning holiday and/or short break? (Tick one box only)**

At least once every five years .....	<input type="checkbox"/>
Less often than every five years or not at all .....	<input type="checkbox"/>

**Q38 (ALL RESPONDENTS) We would like to contact a sample of visitors we've interviewed to ask some further questions relating to the trip. There will be a prize draw of a luxury hamper to the value of £100 for taking part. Would it be ok for us to contact you by telephone at some point during the next month? (Tick one box only)**

Yes .....	<input type="checkbox"/>
No .....	<input type="checkbox"/>



## DEMOGRAPHICS (ALL RESPONDENTS)

### Q39 SHOWCARD K

Which of the following best describes your party on this visit? (Tick one box only)

Visiting alone .....	<input type="checkbox"/>	Family - without children .....	<input type="checkbox"/>
A couple .....	<input type="checkbox"/>	Friends .....	<input type="checkbox"/>
Family - with young children .....	<input type="checkbox"/>	Organised group / society .....	<input type="checkbox"/>
Family - with older children .....	<input type="checkbox"/>	Other .....	<input type="checkbox"/>
Family - with young and older children .....	<input type="checkbox"/>		

### Q40 Gender (Tick one box only)

Male .....	<input type="checkbox"/>	Female .....	<input type="checkbox"/>
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### Q41 Age (Tick one box only)

16 - 19 .....	<input type="checkbox"/>	25 - 34 .....	<input type="checkbox"/>	45 - 54 .....	<input type="checkbox"/>	65+ .....	<input type="checkbox"/>
20 - 24 .....	<input type="checkbox"/>	35 - 44 .....	<input type="checkbox"/>	55 - 64 .....	<input type="checkbox"/>		

### Q42 Marital status (Tick one box only)

Married or equivalent .....	<input type="checkbox"/>	Widowed, divorced or separated .....	<input type="checkbox"/>
Single, never married .....	<input type="checkbox"/>		

### Q43 Are there any children under the age of 15 in your household who you are responsible for (parent, legal guardian)? (Tick one box only)

Yes .....	<input type="checkbox"/>	No .....	<input type="checkbox"/>
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### Q44 Status in household (Tick one box only)

Chief income earner .....	<input type="checkbox"/>	Other adult (aged 16+) .....	<input type="checkbox"/>
---------------------------	--------------------------	------------------------------	--------------------------

### Q45 Working status of respondent (Tick one box only)

Working full time (30+ hours per week) .....	<input type="checkbox"/>	Looking after the home .....	<input type="checkbox"/>
Working part time (up to 29 hours per week) .....	<input type="checkbox"/>	Full time carer .....	<input type="checkbox"/>
Full time education .....	<input type="checkbox"/>	In training .....	<input type="checkbox"/>
Retired .....	<input type="checkbox"/>	Other .....	<input type="checkbox"/>

### Q46 Occupation of chief income earner (last job if retired)

Actual job .....	
Position / grade .....	

### Q47 Social class (Interviewer: please code) (Tick one box only)

AB .....	<input type="checkbox"/>	C1 .....	<input type="checkbox"/>	C2 .....	<input type="checkbox"/>	DE .....	<input type="checkbox"/>
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### Q48 Do you speak Welsh? (Tick one box only)

Yes, fluently .....	<input type="checkbox"/>	Yes, but not fluently .....	<input type="checkbox"/>	No .....	<input type="checkbox"/>
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**Q49 SHOWCARD K**

**What is your ethnic group? (Tick one box only)**

White British .....	<input type="checkbox"/>	Other mixed .....	<input type="checkbox"/>	African .....	<input type="checkbox"/>
White Welsh .....	<input type="checkbox"/>	Indian .....	<input type="checkbox"/>	Other black .....	<input type="checkbox"/>
Other white .....	<input type="checkbox"/>	Pakistani .....	<input type="checkbox"/>	Chinese .....	<input type="checkbox"/>
White & black Caribbean .....	<input type="checkbox"/>	Bangladeshi .....	<input type="checkbox"/>	Other .....	<input type="checkbox"/>
White & black African .....	<input type="checkbox"/>	Other Asian .....	<input type="checkbox"/>		
White & Asian .....	<input type="checkbox"/>	Caribbean .....	<input type="checkbox"/>		

**Q50 Do you or does anyone in your party have any of the following conditions or impairments?**  
(Tick all that apply, includes problems due to old age)

No conditions or impairments .....	<input type="checkbox"/>	Other .....	<input type="checkbox"/>
Mobility .....	<input type="checkbox"/>	Don't know .....	<input type="checkbox"/>
Sight .....	<input type="checkbox"/>	Refused .....	<input type="checkbox"/>
Hearing .....	<input type="checkbox"/>		

**Q51 PLEASE RECORD THE FOLLOWING INFORMATION**

**This information is for back checking purposes only and your details will not be passed to any third parties. A representative of Strategic Marketing may call you to confirm this interview took place and established whether this interview was conducted in a professional manner.**

Respondent name .....	<input type="text"/>
Address .....	<input type="text"/>
Full postcode .....	<input type="text"/>
Telephone number .....	<input type="text"/>
Best time to call .....	<input type="text"/>

**PLEASE THANK RESPONDENTS FOR TAKING PART & PROVIDE A THANK YOU LEAFLET**

**Interviewer Declaration: I declare that this interview was conducted in accordance with your instructions and within the code of conduct of the Market Research Society.**

**PLEASE COMPLETE THE FOLLOWING:**

Full name: .....	<input type="text"/>
End time of Interview - RECORD EXACT TIME .....	<input type="text"/>
Date of interview: .....	<input type="text"/>
OFFICE USE ONLY - Sequence Number .....	<input type="text"/>

# Wales Visitor Survey

## Telephone Follow-up

N.B. The first 13 questions in the telephone follow-up questionnaire are the subject of *Information Needs*. They are excluded here because the results are covered in a separate *Information Needs* report.

### EATING OUT

- Q14 Did you eat out during your trip?**
- Yes ..... ☐
- No ..... ☐
- Can't remember ..... ☐
- Q15 How satisfied were you overall with your experience of eating out in Wales on a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied?**
- |  | 1                        | 2                        | 3                        | 4                        | 5                        | 6                        | 7                        | 8                        | 9                        | 10                       | D/k                      |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Quality of food                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Value for money                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Use of local or Welsh food on the menu | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Range of places to eat                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### SUSTAINABILITY

- Q16 How important is it to you that a destination you choose to visit is managed sustainably? By 'sustainably' we mean preserving the environment and being fair-trade.**
- Very important ..... ☐
- Quite important ..... ☐
- Not very important ..... ☐
- Not at all important ..... ☐
- Don't know ..... ☐
- Q17 And how important is it to you that the accommodation you choose to visit is managed sustainably?**
- Very important ..... ☐
- Quite important ..... ☐
- Not very important ..... ☐
- Not at all important ..... ☐
- Don't know ..... ☐
- Q18 To what extent do you agree or disagree with the statement, "Wales represents a sustainable tourism destination for holidays and breaks"?**
- Strongly agree ..... ☐
- Slightly agree ..... ☐
- Slightly disagree ..... ☐
- Strongly disagree ..... ☐
- Don't know ..... ☐

- Q19 Which of the following, if any, have you heard of? (READ OUT)**
- Green Dragon* ..... ☐
- Green Tourism Business Scheme* ..... ☐
- David Bellamy Award*..... ☐
- None of them* ..... ☐

- Q20 Which of the following terms relating to coastal areas have you heard of, if any? (READ OUT)**
- Blue Flag award*..... ☐
- Green Coast Award*..... ☐
- Seaside Award* ..... ☐
- None of them* ..... ☐

## SATISFACTION

- Q21 How satisfied were you with the following aspects of your trip to/in Wales on a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied? Answer 'not applicable' if any are not applicable.**
- |                                     | 1                        | 2                        | 3                        | 4                        | 5                        | 6                        | 7                        | 8                        | 9                        | 10                       | n/a                      |
|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Overall experience                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Feeling of welcome                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleanliness of streets              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Feeling of security by day          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Feeling of security by night        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| General atmosphere                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleanliness of public toilets       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Availability of public toilets      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Friendliness of people              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Standard of tourist signposting     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleanliness of beaches              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Availability of tourist information | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Facilities at seaside               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Sea water quality                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Standard of route waymarking        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- Q22 Overall, would you say your trip to/in Wales was:**
- 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* ..... ☐

- Q23 (ASK ONLY TO THOSE WHOSE SAID UNLIKELY TO RETURN IN F2F SURVEY)**

**In the face to face interview you said that you are unlikely to make another visit to / within Wales in the next few years. Why is that? (UNPROMPTED)**

- Not asked*..... ☐
- Long way to travel*..... ☐
- Getting old*..... ☐
- Can't afford to* ..... ☐
- Nothing bad - just want to see other places* ..... ☐
- Lack of time* ..... ☐
- Lack of things to do in Wales*..... ☐
- General bad experience of Wales*..... ☐
- People not very friendly*..... ☐
- Bad weather* ..... ☐

Put off by Welsh language ..... ☐

Other..... ☐

Please specify other

---

**Q24** If you could describe Wales as a place to visit in a just few words, what would you say about it?

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**Q25** Would you recommend Wales as a place to visit to a friend or relative?

Definitely would ..... ☐

Probably would..... ☐

Probably wouldn't..... ☐

Definitely wouldn't ..... ☐

**Q26** How important, or not, is it to you that your trip in/to Wales gives you an experience that is distinct to Wales and that you couldn't have anywhere else?

Very important..... ☐

Somewhat important..... ☐

Not very important..... ☐

Not at all important ..... ☐

Don't know ..... ☐

**Q27** Finally, do you have any other comments you would like to make about your trip to/in Wales?

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