

Wales Visitor Survey 2013

REPORT – Overseas Visitors



Llywodraeth Cymru
Welsh Government

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1. Headline Findings

Satisfaction ratings are up on 2011

- 1.1 Overseas visitor satisfaction ratings with trips to Wales are up on 2011. The two highest ratings are 'quality of the natural environment' (9.5 – up from 9.2 in 2011) and 'friendliness of people' (9.5 – up from 9.3 in 2011). These are similar average scores to those given by UK visitors.
- 1.2 Commercial aspects of the destination, which were rated much lower than other attributes in 2011, have improved significantly. These include 'value of money' (8.8 – up from 8.1), 'places to eat and drink' (8.8 – up from 8.1) and 'shopping' (8.9 – up from 8.2).
- 1.3 Attraction ratings are all significantly higher than in 2011. 'Overall enjoyment' of attractions is up significantly from 8.7 to 9.2.

Trips to Wales meet or exceed expectations

- 1.4 Most (87%) new/lapsed visitors, and even the majority (57%) of repeat visitors say post-trip that their trip to Wales was better than expected. Wales offers a very pleasant surprise to many overseas visitors, especially its natural beauty.

Significant rise in outdoor activities

- 1.5 The motivation to take part in outdoor activities during a trip to Wales has risen significantly from 14% in 2011 to 31% in 2013. The dry and sunny weather this summer compared to 2011 may have played a part in this increase.

Motivation to visit South East Wales differs greatly from the other regions of Wales

- 1.6 South East Wales is different from the other three regions in terms of motivations to visit. 'To visit places / historical sites etc' (motivation for 85% of visitors) is much higher than in the rest of Wales (68%).
- 1.7 On the other hand 'to enjoy landscape / countryside / beach' (56%) is lower than the rest of Wales (71%), and 'to take part in outdoor activities' (19%) is much lower than the rest of Wales (46%).

Castles and historic attractions are particularly interesting to overseas visitors

- 1.8 Visiting a castle or historic attraction is by far the most frequently mentioned specific reason for visiting Wales, featuring in three out of five (61%) trips. Propensity to visit Wales' castles and historic attractions appears to be higher among nationalities which are not used to seeing such sites in their own country, especially Americans (68% have visited castles or historic attractions).

Self catering accommodation is rated particularly high

- 1.9 Accommodation in Wales is generally well rated by overseas visitors. The average overall satisfaction rating is 9.0.
- 1.10 Self catering accommodation is particularly well rated, averaging 9.5 for overall satisfaction.

Strong intentions to return

- 1.11 Almost all (99%) repeat visitors and most (77%) new/lapsed visitors say they will 'definitely' or 'probably' return to Wales in the next few years.
- 1.12 Intentions not to return soon are more likely to be related to circumstances (e.g. geographical distance from Wales) than satisfaction because during-trip and post-trip satisfaction ratings are so high.

Extremely high advocacy for Wales

- 1.13 All thirty (100%) respondents in the follow-up survey say they would 'definitely' recommend Wales to a friend or relative. Some are already doing it.

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
Total	3,323		3,323

*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 interviewers 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 Overseas visitor market; UK Staying visitors and UK Day visitors are discussed in separate reports.
- 2.12 The report covers the main face to face survey (395 interviews with Overseas visitors), and the telephone follow-up survey (30 interviews with Overseas 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 The telephone follow-up survey sample of 30 Overseas interviews is not as large as originally hoped, but this was the maximum number realistically achievable from a very limited number of Overseas visitors leaving their telephone number and consenting to further contact.
- 2.14 Section 8 of this report covers an additional element to the Visitor Survey – a self-completion survey of 279 passengers on a German cruise ship which docked in Holyhead on 19 May 2013.
- 2.15 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

Origin of visitors

Origin of visitors (F2F survey)		Overall	
Continent	Country or Region	2013	2011
Europe	Germany	12%	12%
	France	7%	9%
	Spain	6%	*
	Republic of Ireland	5%	5%
	Netherlands	5%	6%
	Switzerland & Austria	4%	*
	Italy	3%	*
	Scandinavia	2%	3%
	Western Europe other	2%	*
	Eastern Europe	5%	*
North America	USA	16%	20%
	Canada	4%	
Oceania	Australia	14%	15%
	New Zealand	2%	
Asia	Middle East	3%	1%
	China	2%	5%
	Asia other	5%	
Africa	South Africa	2%	2%
South America	South America	1%	1%
Sample size		395	601

* Some results were not split out in the same detail in 2011

Very diverse range of overseas visitors; however profile is not different from 2011

- 2.16 Visitors from all over the globe have come to Wales in 2013. The top three individual countries of origin are USA (16% of overseas visitors), Australia (14%) and Germany (12%). Australia is high in comparison to the proportion of overseas visitors that it contributes to the UK as a whole (3% in 2012 according to VisitBritain). Interviews were conducted in English, so this might have resulted in a respondent bias towards those confident enough to converse in the language.
- 2.17 The 2013 profile of overseas visitors to Wales is very similar to 2011.

Distribution of overseas visitors by region of Wales

Origin of visitors (F2F survey)	Region of Wales visited				
Country or Region	North Wales	Mid Wales	South West	South East	Sample size
USA	11%	2%	12%	75%	65
Australia	21%	5%	11%	63%	56
Germany	24%	4%	24%	48%	46
Europe other	25%	12%	16%	47%	154
Rest of world other	9%	11%	19%	61%	74
All	19%	8%	16%	57%	395

N.B. The percentages in the above table add up to 100% horizontally not vertically in order to show how visitors from each country/region distribute themselves across Wales.

The sample sizes of most countries are too small to split reliably across regions of Wales.

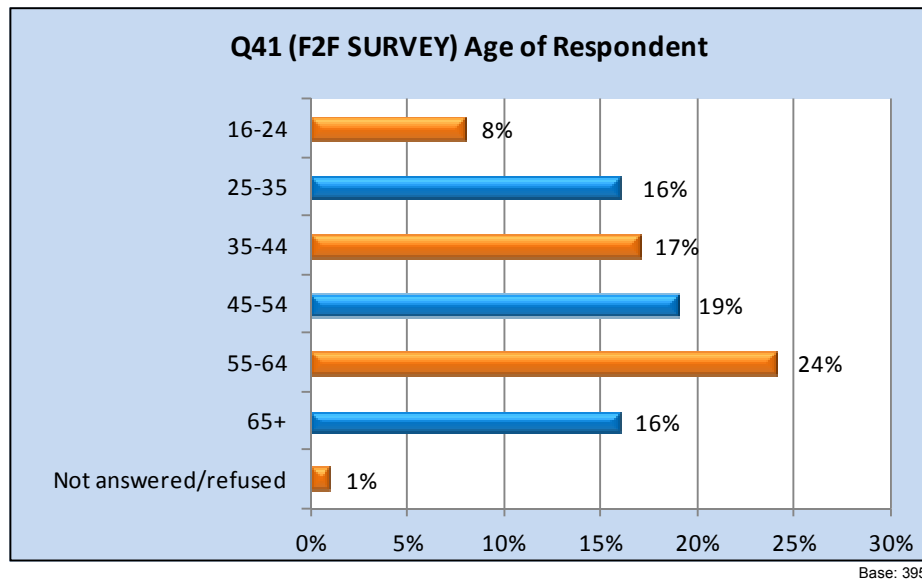
South East the main draw for overseas visitors, especially from outside Europe

- 2.18 Well over half (57%) of overseas visitors have been interviewed during a stay in South East Wales. South East Wales has attracted three quarters (75%) of US visitors to Wales, nearly two thirds (63%) of Australians and the majority (61%) of visitors from the rest of the world outside Europe.

European visitors more evenly spread than visitors from outside Europe

- 2.19 The European market offers a more even distribution of visitors across Wales, with North Wales picking up a quarter (25%) of European visitors, and South West Wales picking up 18%.

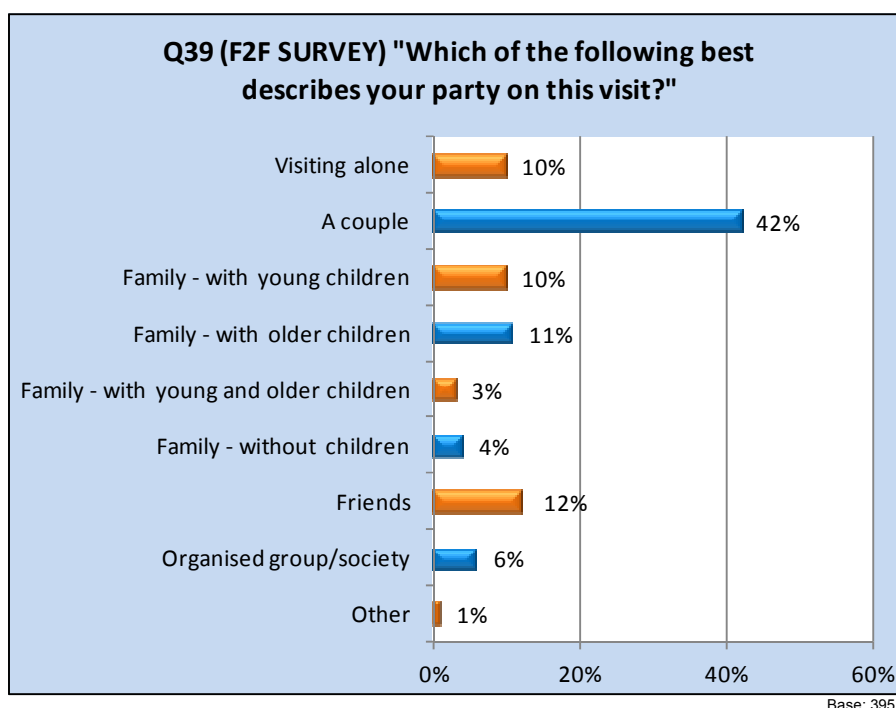
Age of visitors



Age profile much more balanced than UK visitors

- 2.20 The age profile of overseas visitors to Wales is much more balanced than the UK visitor profile, which is skewed significantly towards the older age groups.
- 2.21 About a quarter (24%) of overseas visitors are aged under 35 – much higher than the under 35 proportion of UK staying visitors (12%). About one in six (16%) overseas visitors are aged over 65 – much lower than the over 65 proportion of UK staying visitors (26%).
- 2.22 This difference in age profile might be because Wales has a more universal appeal to different age groups overseas; however it might be due to other factors such as young people's propensity to travel abroad and over 65's propensity not to travel abroad. In 2012 (and in every year for the past ten years), more than a third (36%) of overseas visitors to Britain were aged under 35, and just 6% were aged over 65 (*source: VisitBritain*).

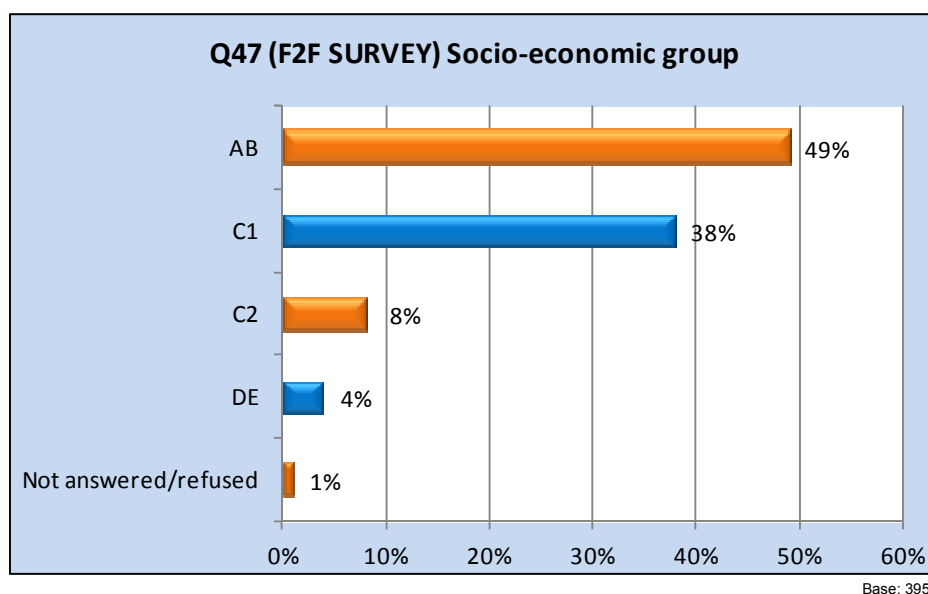
Type of visiting party



More lone visitors, groups of friends and older children than UK visitor profile

- 2.23 The much greater proportion of under 35 overseas visitors compared to UK visitors reflects itself in the visitor party profile. 12% of overseas parties to Wales are groups of friends (compared to 7% of UK staying visitors) and 10% are lone visitors (compared to 5% of UK staying visitors).
- 2.24 The proportion of overseas families with young children (13%) is much lower than the proportion of UK staying visitors with young children (30%). This could be due to the practicalities and cost of travelling overseas with young children compared to travelling domestically.

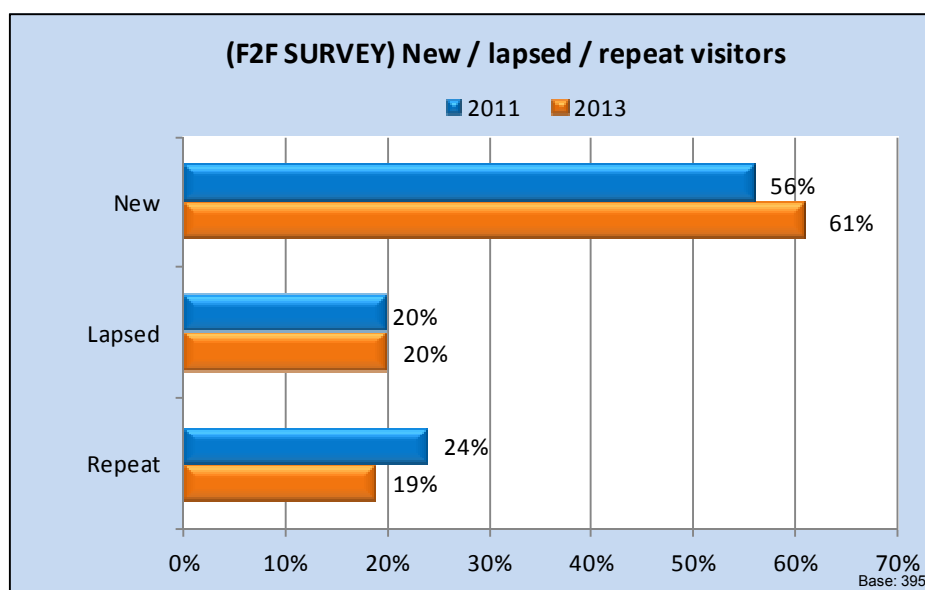
Socio-economic group



AB proportion is very high

- 2.25 About half (49%) of overseas visitors to Wales are in the A and B socio-economic groups, sometimes described as 'upper middle class' and 'middle class'. This may be because they have more disposable income to travel abroad.

New / lapsed / repeat visitors



Over half of overseas visitors coming to Wales for the first time

- 2.26 About three in five (61%) overseas visitors in 2013 are new visitors to Wales. About two in three (65%) overseas visitors to South Wales (SE and SW) are new visitors, compared to a lower proportion (51%) of overseas visitors travelling to North & Mid Wales.

“Wales is amazing. Similar to Scotland, but more friendly. It is cleaner and the people are more helpful.”

First time visitor, Germany

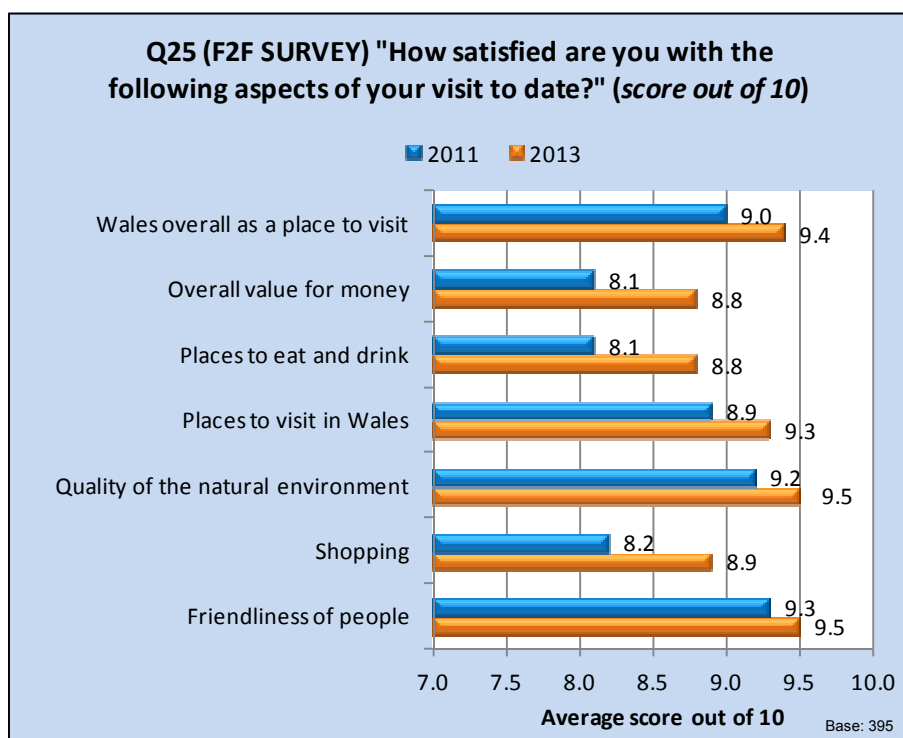
“Totally under-rated. So many different corners & vistas to enjoy. Everything is incredibly well run.”

First time visitor, South Africa

- 2.27 Differences by country of origin are mostly not significant; over half of visitors from each of the significant markets to Wales have come for the first time. The exception is the Republic of Ireland, whereby a lower proportion (33%) of visitors are new.

3. Satisfaction Ratings

Satisfaction ratings – during trip



The above question has been asked in the face to face survey (i.e. during trip)

No limit to satisfaction with Wales

- 3.1 Satisfaction ratings given by overseas visitors during-trip have risen significantly since 2011. Overall satisfaction has increased from 9.0 in 2011 to 9.4 in 2013. Satisfaction is consistently high across region of Wales visited, origin of visitor and type of visitor (new / lapsed / repeat).
- 3.2 The overall satisfaction rating (9.4) is so high this year that there isn't much room left on the scale to improve. Some visitors however see no limit.

"If I could score Wales higher than a 10/10 I would"
South African visitor

Quality of natural environment and friendliness of people hold strong appeal for the overseas visitor

- 3.3 'Quality of the natural environment' and 'friendliness of people' are the highest rated attributes by UK visitors, and this is also the case with overseas visitors. Both attributes average 9.5, and the enthusiastic comments support this.

"Friendly, cosy, different to Australia - I love the village atmosphere"

Australian visitor

"Wales is very undersold, beautiful beaches, countryside and scenery. Friendly people and lots to see."

South African visitor

"Lots of green, lots of picture-perfect scenery. Lovely people."

German visitor

Significant improvements in value for money, places to eat and drink, and shopping

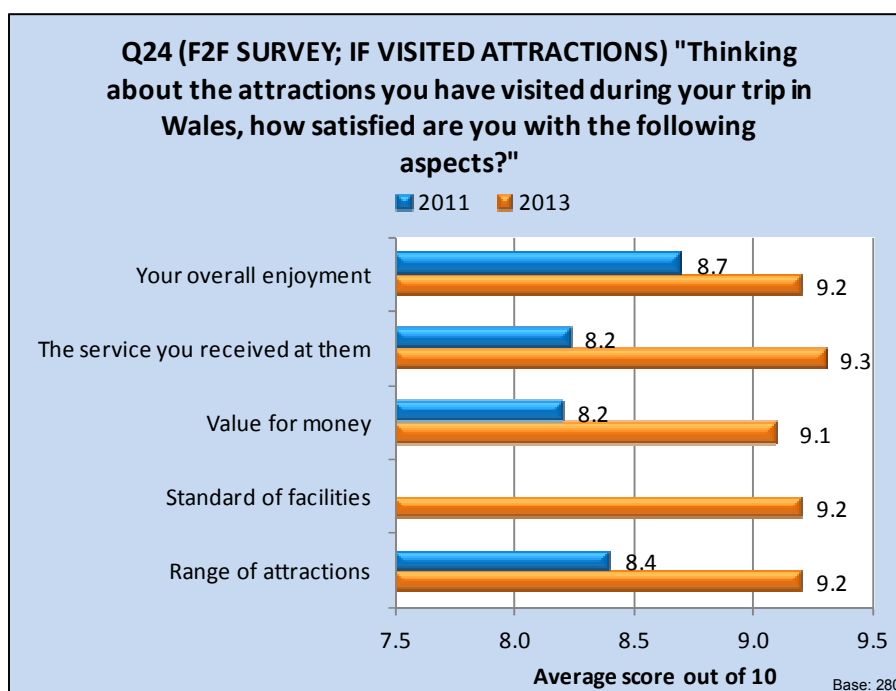
- 3.4 In 2011, overseas visitors' ratings of the more commercial aspects 'value for money', 'places to eat & drink' and 'shopping' lay significantly behind the other destination attributes. In 2013, these ratings have improved significantly, including the particularly important rating of 'value of money' (up to 8.8 from 8.1).

"Friendly, lots to see and good value for money"

French visitor

- 3.5 Ratings given for value for money are fairly consistent by country of origin. Noticeably higher ratings are given by visitors from Canada (9.4) and Australia (9.1), and lower by visitors from the Netherlands (8.4).

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

High ratings for attractions

- 3.6 Overseas visitors have enjoyed themselves greatly at attractions in Wales. All aspects of service, value and standard are well rated.

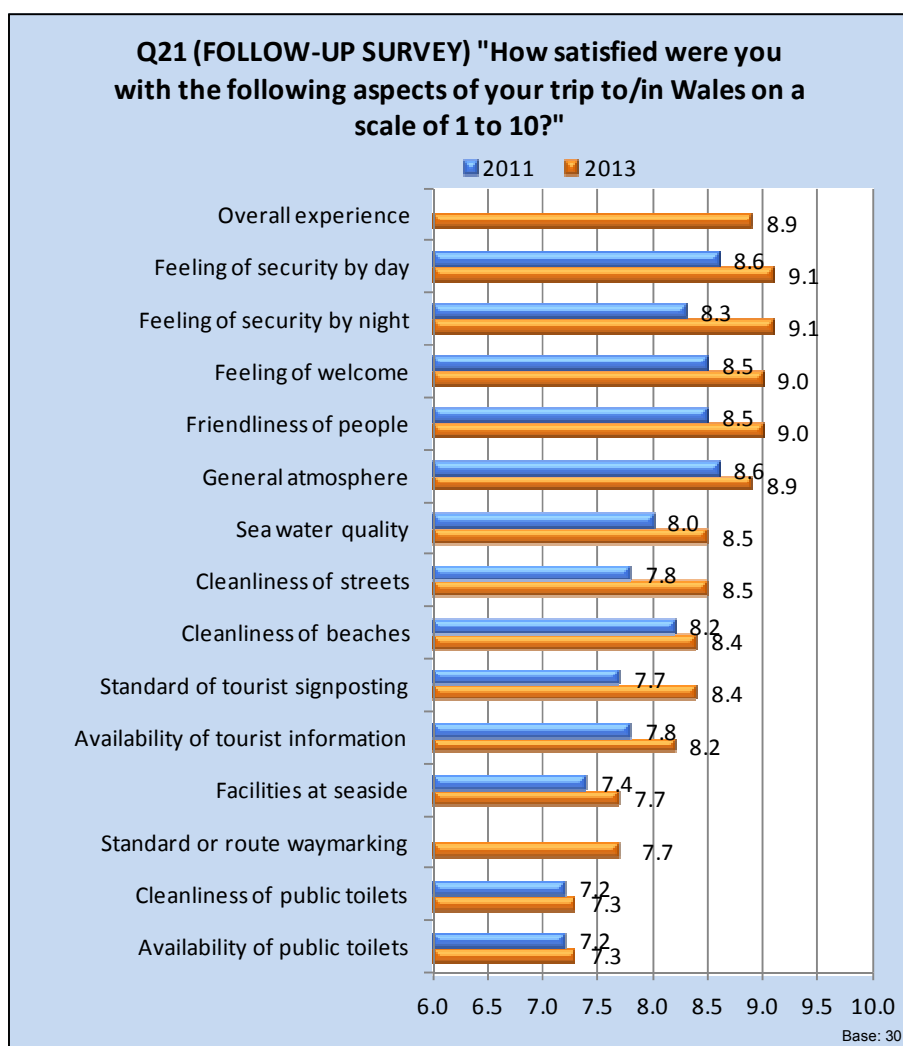
"Wales has a surprising variety of things to do"

Manx visitor

"Lots for small children to do and for families"

German visitor

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

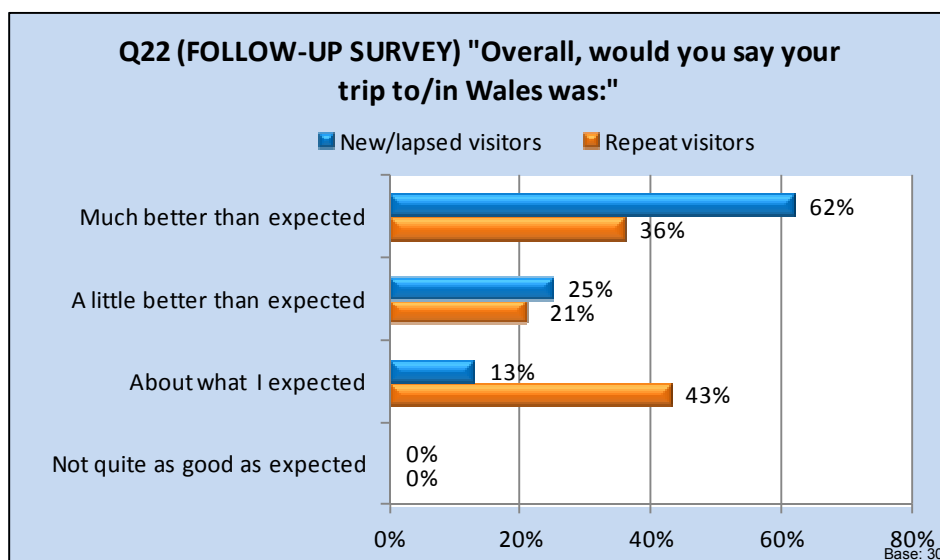
Satisfaction is not as high post-trip

- 3.7 Overall satisfaction with trips when measured post-trip averages 8.9. This is a high level of satisfaction, but it is not as high as it is when measured during-trip (9.4).
- 3.8 All of the ratings have risen since 2011. However, some caution needs to be taken as the follow-up methodology used in 2011 was self-completion (online), and answers to grid questions can vary significantly between self-completion and telephone.

Order of post-trip ratings is very similar to UK visitors

- 3.9 The order in which the above destination attributes are rated post-trip is very similar to the order given by UK visitors. Feelings of security and welcome rank highest, whilst public toilets are the aspect of the destination requiring the most attention for improvement.

Experience compared to expectations



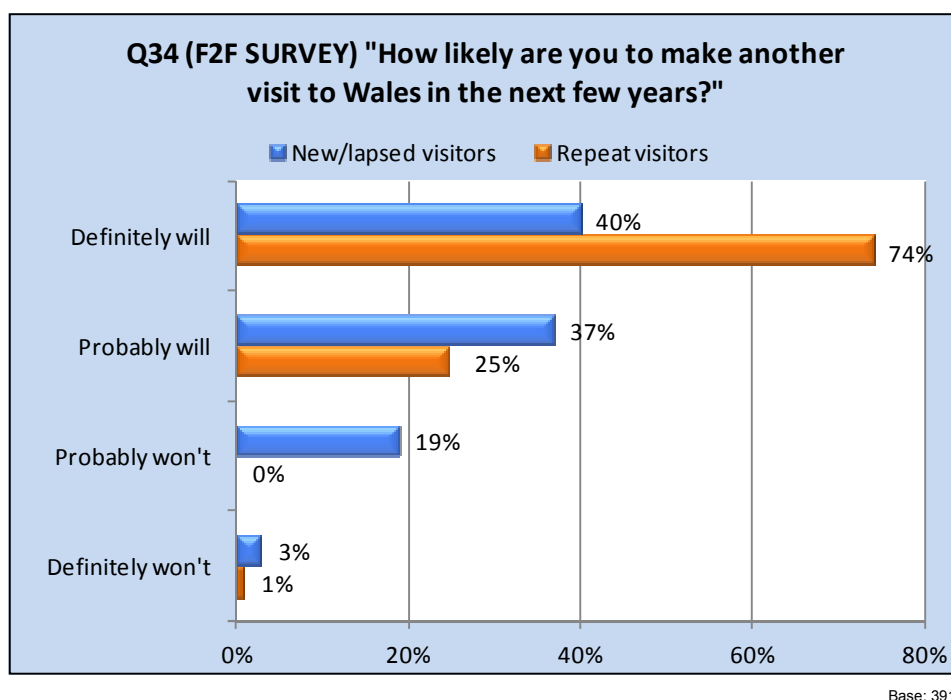
Wales offers a very pleasant surprise

- 3.10 Most (87%) new/lapsed visitors, and even the majority (57%) of repeat visitors say their trip to Wales was better than expected. Wales offers a very pleasant surprise to many overseas visitors, especially its natural beauty.

"Wales is a lovely destination to visit and very different to the rest of the UK"
Russian visitor

"There is unexpected beauty in villages and stunning countryside and castles"
Spanish visitor

Likelihood of returning



Strong intentions to return

- 3.11 Almost all (99%) repeat visitors and most (77%) new/lapsed visitors say they will 'definitely' or 'probably' return to Wales in the next few years.

"We're definitely coming back"
Irish visitor

Intentions not to return soon are likely related to circumstances not satisfaction

- 3.12 Some (19%) overseas visitors think they won't return to Wales within the next few years. These visitors are mostly from outside Europe, including a third (33%) from Australia. With satisfaction ratings during and post-trip so high, it is likely that many of these visitors would like to return one day; it may just not be practical to return 'within the next few years' (as the question asks).

Likelihood of recommending

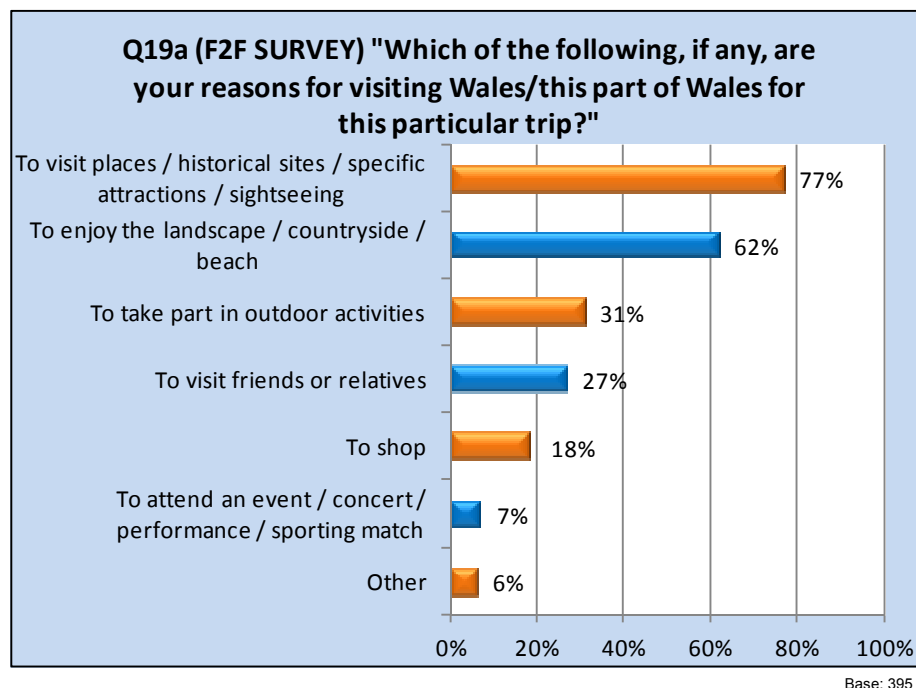
- 3.13 The *Information Needs* research has confirmed that recommendations from friends / relatives / colleagues are a very powerful influence on people's decisions to visit a new destination. For some people it's the most powerful influence of all. This makes it all the more important that visitors to Wales share their experience with others - especially as their satisfaction is so high.
- 3.14 All thirty respondents (100%) to the follow-up survey would 'definitely' recommend Wales to a friend or relative. Some are already doing that.

"I've recommended it to people who have been already"
Irish visitor

"I can recommend Wales to anybody"
German visitor

4. Motivation for Visiting

Overview of motivation



Significant rise in outdoor activities and visiting places

- 4.1 The motivation 'to visit places / historical sites etc' has risen significantly from 65% of trips in 2011 to 77% in 2013. 'To take part in outdoor activities' has also risen significantly from 14% in 2011 to 31% in 2013.
- 4.2 The dry and sunny weather this summer compared to 2011 may have played a part in these increases, especially for outdoor activities, but awareness of what Wales has to offer may have also improved.

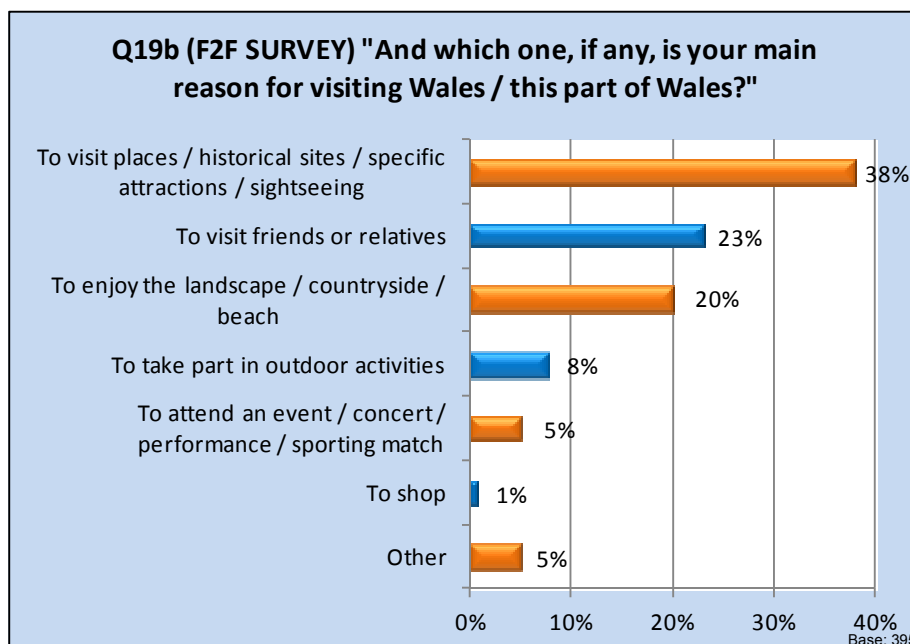
"If you're looking for an adventure holiday, Wales is probably the best place to go right now"
Dutch visitor

Motivations to visit South East Wales differ from the other three regions

- 4.3 South East Wales is different from the other three regions in terms of motivations to visit. 'To visit places / historical sites etc' (motivation for 85% of visitors) is much higher than in the rest of Wales (68%).

- 4.4 On the other hand 'to enjoy landscape / countryside / beach' (56%) is lower than the rest of Wales (71%), and 'to take part in outdoor activities' (19%) is much lower than the rest of Wales (46%).

Main reason for visiting



Friends and relatives are a significant draw for overseas visitors

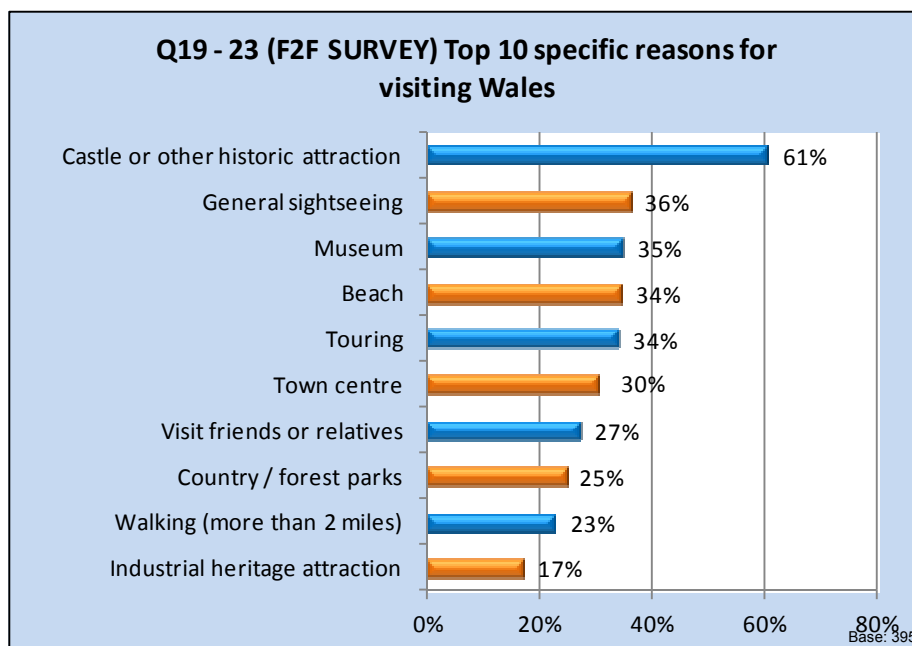
- 4.5 Trips based around visiting friends and relatives make up quite a significant proportion (23%) of total overseas trips (this compares to 15% of UK staying trips).
- 4.6 The *Information Needs* research has revealed that thinking of things to do with overseas visitors is one of the reasons why Welsh residents would like to be more informed about places to go in their own country.

South East Wales differs greatly from the rest of Wales

- 4.7 The primary motivation to visit South East Wales can differ significantly from the rest of Wales. 'To visit places / historical sites etc' is the main reason for about half (53%) of trips to South East Wales, but a much lower proportion (20%) of visits to the rest of Wales.

- 4.8 On the other hand, 'to enjoy landscape / countryside / beach' is much lower in South East Wales (11%) than in the other regions (30%), as is 'to take part in outdoor activities' (5% in South East Wales compared to 13% elsewhere).

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.

Castles & historic attractions are clearly the top draw for overseas visitors

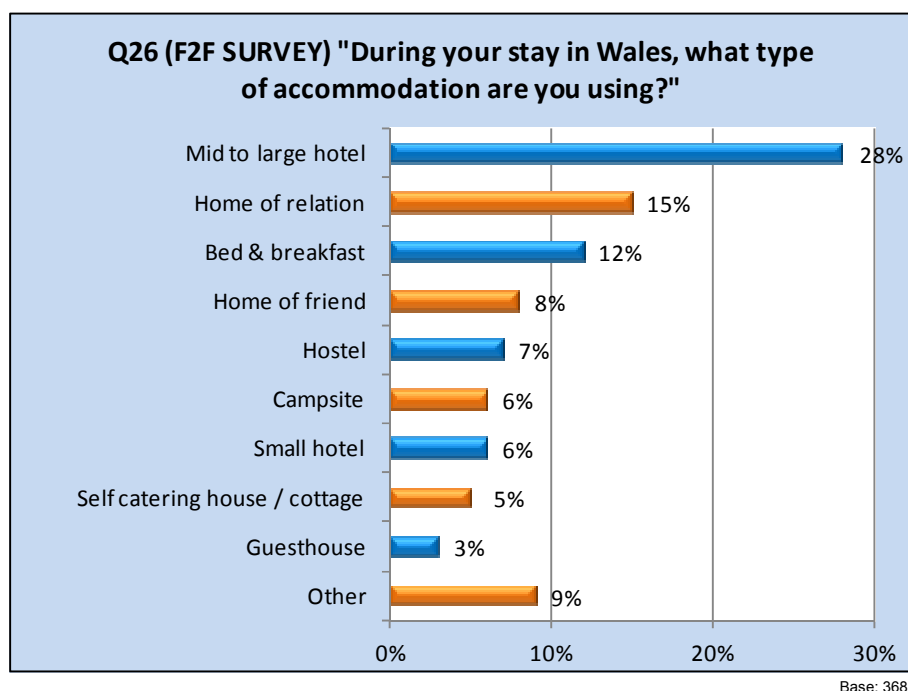
- 4.9 Wales offers a wealth of castles and historical attractions that are very attractive to the overseas market. Three in five (61%) overseas visitors have been to a castle or historic attraction in 2013 – much higher than the second most common activity (general sightseeing – 36%).
- 4.10 Propensity to visit Wales' castles and historic attractions appears to be higher among nationalities which are not used to seeing such sites in their own country. About two in three (68%) American visitors have visited a castle or historic attraction, as have 65% of Canadians and 64% of Australians. This compares to 58% of Europeans.

Overseas visitors less likely to brave the beach than UK visitors

- 4.11 About one in three (34%) overseas visitors have visited the beach. This is much higher than in 2011 (16%), and it is likely that the weather was more acceptable to them this year (even to 36% of Australians and 29% of Spaniards).
- 4.12 However, Welsh beaches are still a more attractive proposition to UK visitors (46% of staying visitors went to the beach this year).

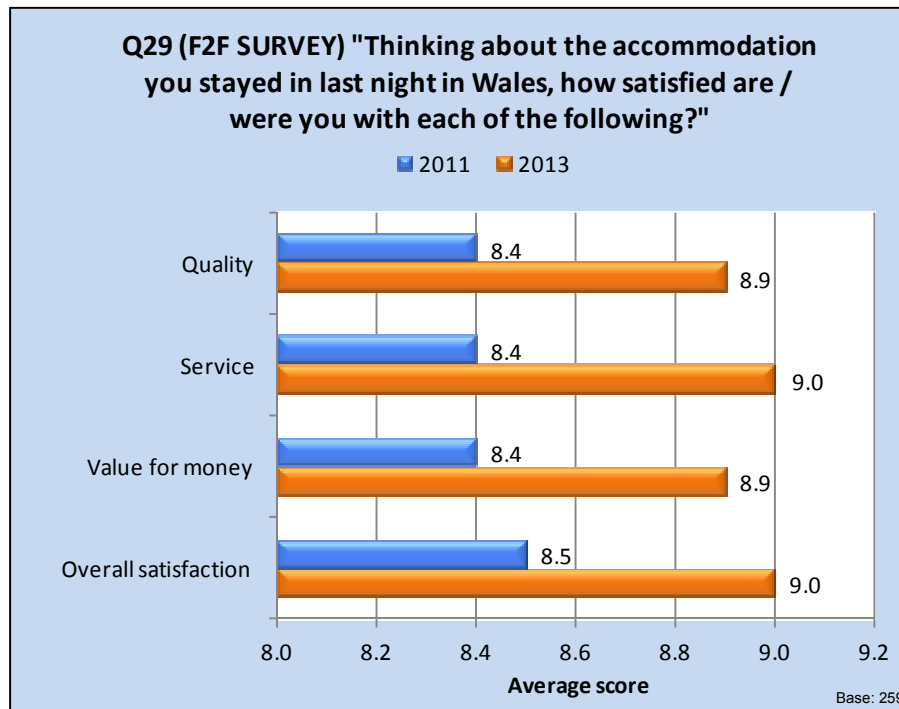
5. Accommodation Used

Accommodation used



Overseas visitors more VFR and hotel based than UK visitors

- 5.1 Overseas visitors are more likely than UK visitors to stay in hotels (34% of overseas staying visits) or the home of friends or relations (23% of overseas staying visits).
- 5.2 UK visitors by comparison are more likely than overseas visitors to opt for self-catering or caravan & camping.
- 5.3 This trend increases with distance away from Wales. Over a quarter (27%) of French / German / Dutch visitors have engaged in a self catering or caravan & camping trip, compared to 5% of North Americans.
- 5.4 Explanations for this difference might include the practicality of buying/bringing own food or equipment when travelling longer distances, trust in recognised brands or propensity to stay in towns.



High satisfaction with accommodation, especially among North American visitors

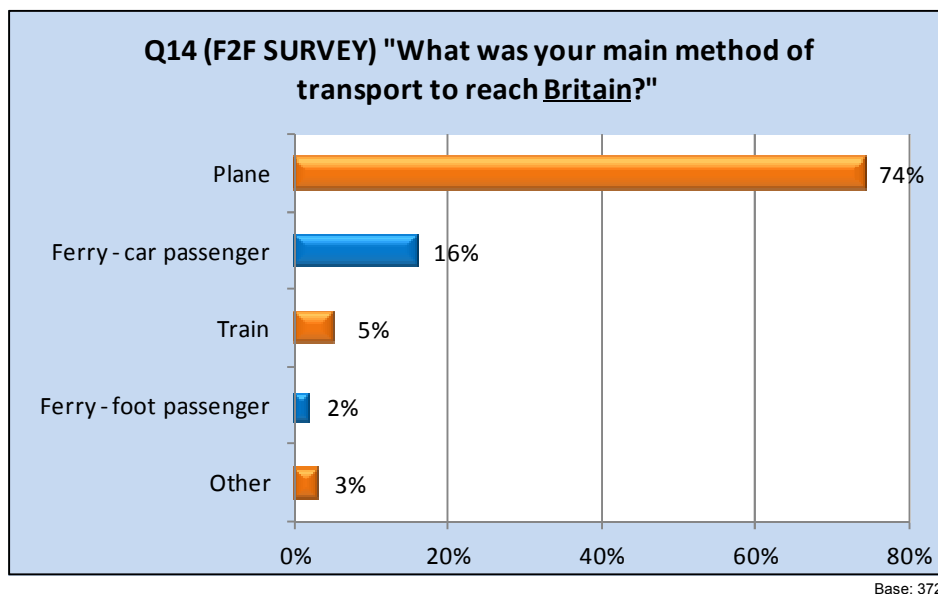
- 5.5 Satisfaction with accommodation among overseas visitors is high across the fundamental aspects of quality, service and value.
- 5.6 North Americans (giving 9.2 average rating overall) are more satisfied than European visitors (giving 8.8 average). Service is a significant factor towards overall satisfaction for North American visitors, rated a very high 9.4 average.
- 5.7 The type of accommodation does differ between the two groups: 53% of North Americans staying in commercial accommodation have opted for a mid to large hotel, whereas European visitors' choices are more diverse.

Self catering accommodation is especially well rated

- 5.8 There are some differences in rating by type of accommodation. Self catering accommodation (whether apartment or cottage) averages a very high 9.5 for overall satisfaction. Small hotels (9.3 average) out-perform mid to large hotels (8.9).

6. Transport Used

Transport used to get to Britain



Planes, trains and automobiles

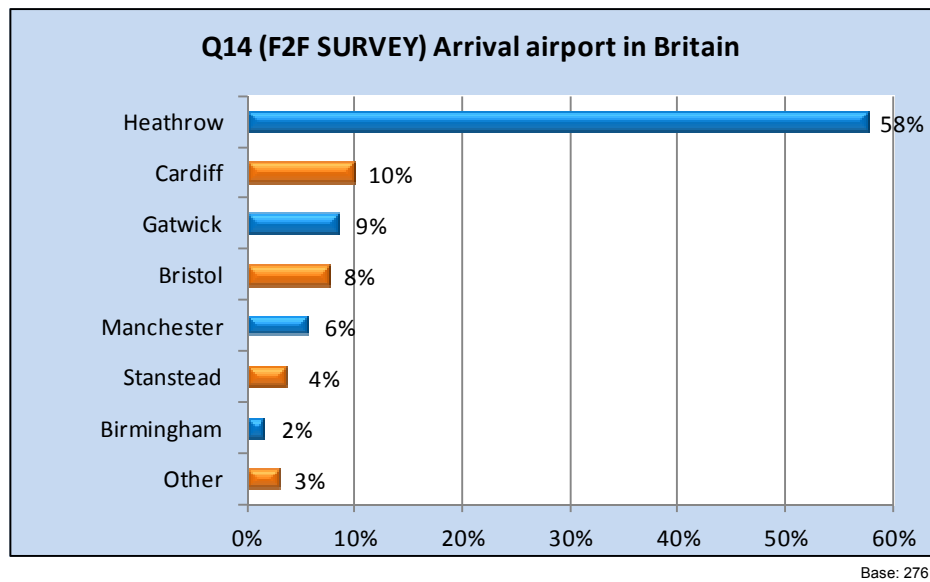
- 6.1 Overseas visitors to Wales have often undertaken a number of legs to their journey to get here. For most, the journey starts with getting to England first.
- 6.2 About three in four (74%) overseas visitors have reached Britain by plane. This is analysed further on the next chart.

White cliffs of Dover

- 6.3 Of those reaching Britain by ferry, by far the most common arrival port is Dover, accounting for 52% of ferry arrivals. This is then followed by the two Welsh ports of Fishguard (9%) and Holyhead (8%). Harwich (8%) is the other port picking up more than a few percent of arrivals.

Channel Tunnel

- 6.4 All of the 5% of visitors reaching Britain by train have travelled through the Channel Tunnel. These visitors are mostly European, although a few non-European visitors doing a grand tour have reached Britain via mainland Europe.



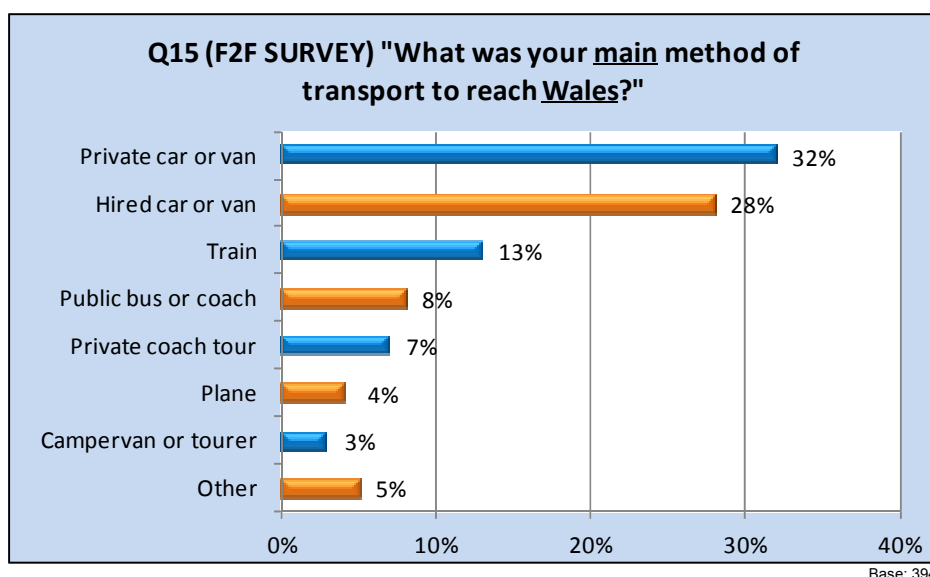
Heathrow arrivals dominating the skies

6.5 Heathrow is by the most common airport for those reaching Britain by plane, accounting for well over half (58%) of respondents. This is especially true of visitors from outside Europe, whereas Heathrow accounts for 76% of arrivals to Britain.

Cardiff airport well used by European visitors

6.6 Heathrow is still the most popular airport for European arrivals, accounting for 26% of traffic, but Cardiff (20%) is second, just ahead of Bristol (18%).

Transport used to get to Wales



Continuing the journey by a variety of means

- 6.7 After reaching Britain, usually England, overseas visitors have either spent time in England first or have travelled straight on to Wales. Methods of getting to Wales vary considerably, as shown above. The methods of getting around Wales reflect the means of reaching Wales.

Drive on the left / Tenez la gauche / Links fahren

- 6.8 Upon arrival in Britain, many (60%) overseas visitors have opted to reach Wales by car, especially from nearby European countries France / Germany / Netherlands (70% of visitors).
- 6.9 Outside of nearby European countries, visitors from countries which drive on the left such as Australia and South Africa (77% have driven) seem more likely to drive than visitors from countries which drive on the right (49% have driven).

How does Welsh public transport rate among overseas users?

- 6.10 Satisfaction with public transport in Wales is fairly high at an average of 8.4 – similar to the rating given by UK staying visitors (8.2). The sample is too small to break down further.

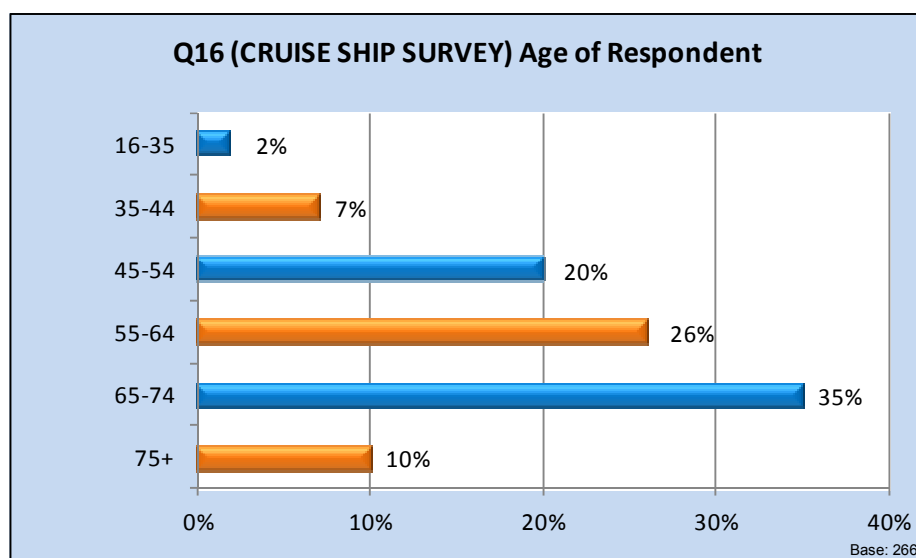
7. Cruise Ship Survey

- 7.1 On 19th May 2013, a cruise ship docked in the Welsh port of Holyhead, and 2,600 Germans descended on the Isle of Anglesey to experience what Wales had to offer them.
- 7.2 Some passengers did not make it off the boat, but others filled in self-completion questionnaires whilst on the coaches which were laid on for them, and this Section reports on the key findings from those completed questionnaires.

Visitor profile

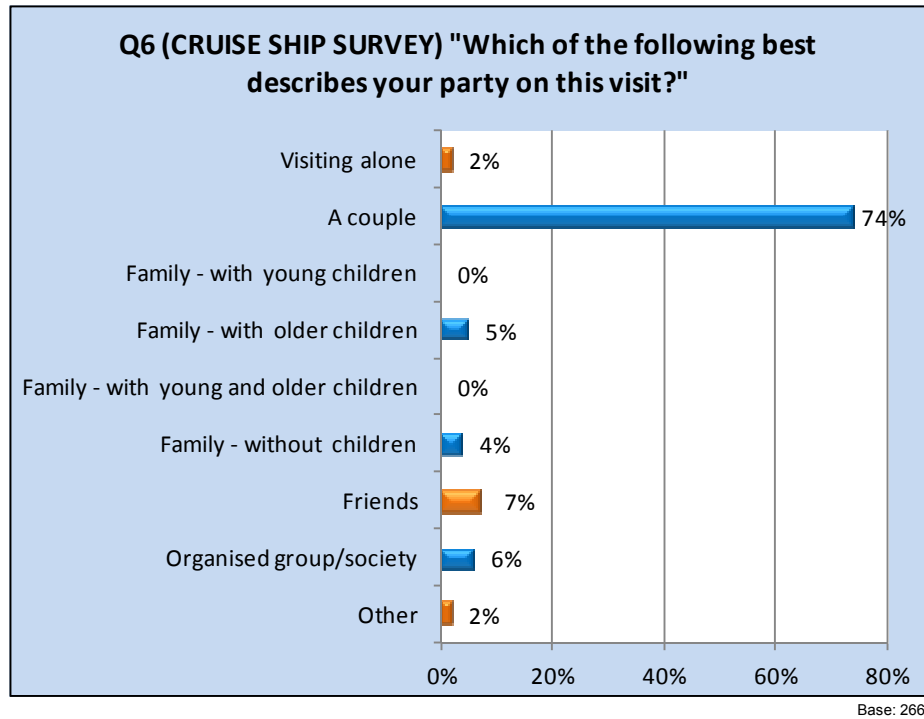
Nearly all in the sample are first-time visitors

- 7.3 Of the sample of 279 cruise ship passengers, 263 (94%) set foot on Welsh soil for the first time. This group represents a considerably different new / repeat visitor profile to the main overseas visitor survey, in which two in five (39%) are lapsed or repeat visitors.



Senior citizens

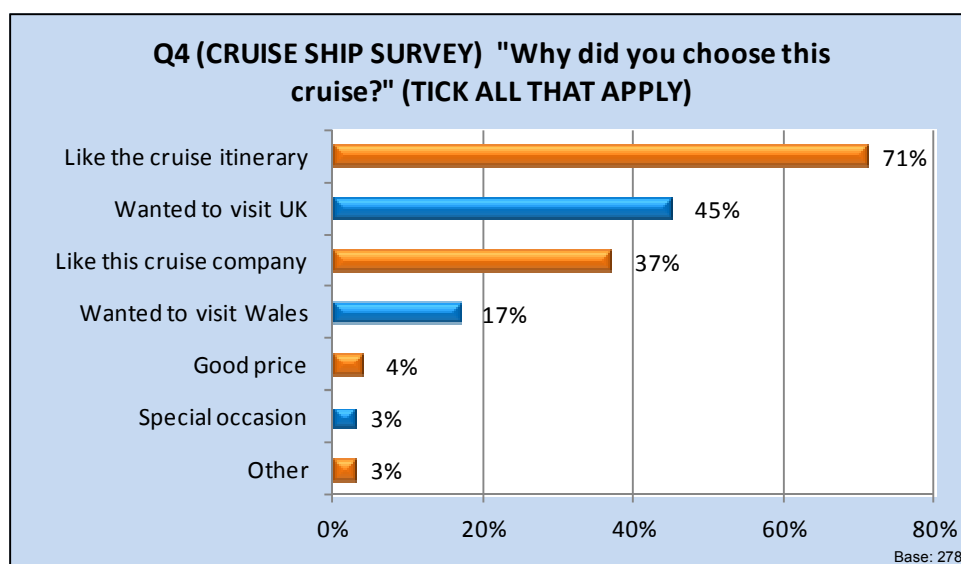
- 7.4 The age profile of the cruise ship respondents is very much skewed towards the older profile, with nearly half (45%) aged over 65. It is interesting to note the comparison with the independent overseas visitors where only 16% are aged over 65.



Two's company

- 7.5 The majority (74%) of cruise passengers travelled as a couple. This is greatly more than the proportion of the main overseas visitor sample made up by couples (42%).
- 7.6 This cruise ship environment appears not to be as appropriate for young children, who do not make up any of the parties in this sample.

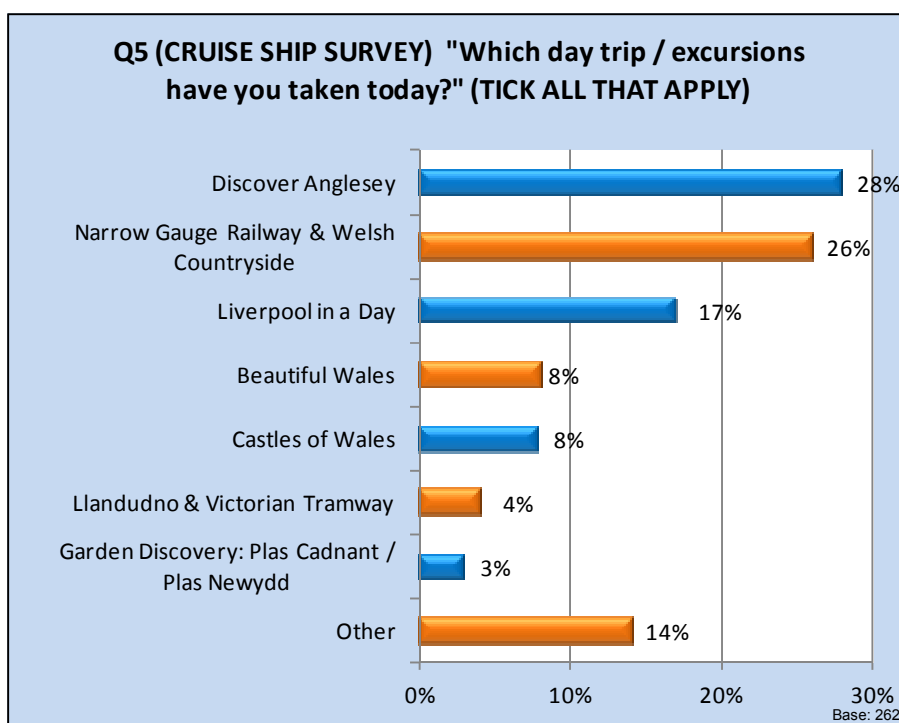
Reasons for choosing the cruise



Attracted by the itinerary, but not necessarily Wales

- 7.7 The cruise itinerary is the most commonly stated reason for choosing the cruise (71% of respondents). However, it is not necessarily the Wales part of the itinerary which attracted passengers as the ship also docked in other UK ports. Nearly half (45%) of respondents state 'wanted to visit the UK' as a factor in the decision. This compares to about one in six (17%) answering 'wanted to visit Wales'.

Choice of excursion



Numerous excursions on offer to passengers

- 7.8 Passengers had many options available to them after disembarking at Holyhead, one of which ('Liverpool in a Day') was outside of Wales. The 'other' category comprises many trips with 1% of respondents each.
- 7.9 The frequencies on the above chart do not necessarily reflect the relative popularity of the trips on offer. Numerous factors have affected the respondent profile by excursion, including which busses accepted questionnaires on the day.
- 7.10 However, some of the subsequent questions are analysed by excursion chosen, and those choosing 'Liverpool in a Day' are excluded from the average spend and satisfaction with Wales results.

Average spend per party

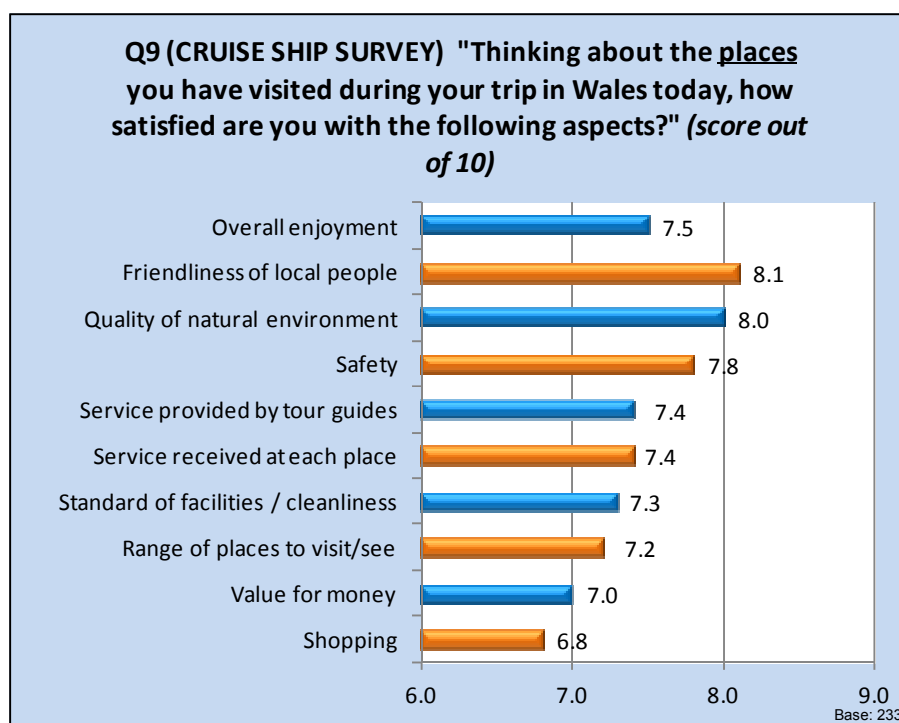
Category	Average spend
Food / refreshments	£9.48
Shopping	£13.21
Other	£13.43
Total	£36.12

N.B. Average spend excludes data given by respondents travelling to Liverpool

Average spend per party is not significant, but there are many parties

- 7.11 The average spend per party taking an excursion in Wales is about £36, and parties are typically couples. Cruise packages can include a number of items and so there is not always much that passengers 'need' to spend directly themselves in the destination.
- 7.12 The cruise ship has however brought a very large volume of visitors to Wales, and so although the average spend per party is not especially high, the overall volume of spend in the destination is quite significant.

Satisfaction with Wales



Answers given by respondents travelling to Liverpool are excluded from the above

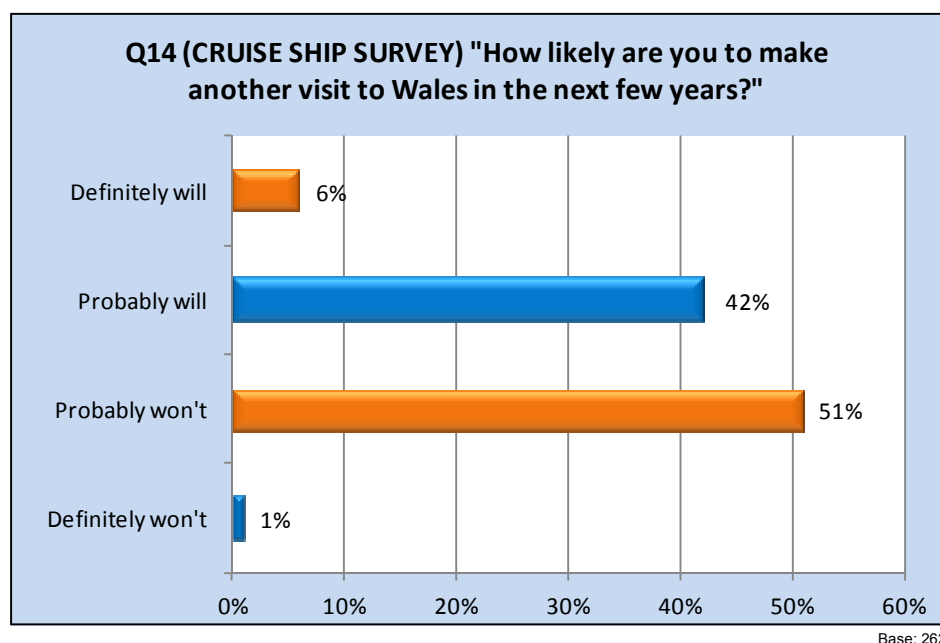
Satisfaction ratings are not nearly as high as for general visitors

- 7.13 Overall enjoyment averages 7.5 out of 10, which is not nearly as high as the average rating given by overseas visitors in the main visitor survey (9.4).
- 7.14 Each of the ratings is skewed by a relatively small proportion of respondents giving low ratings. For 'overall enjoyment' for example, the majority (71%) rate their experience between 8 and 10. Wales has therefore appealed to the majority of respondents, but any negative experiences have been quite strongly negative.
- 7.15 Ratings given by participants on the 'Castles of Wales' excursion are generally higher than the other excursions with significant numbers of respondents, especially 'service received' (8.5), 'value for money' (7.8) and 'service provided by tour guides' (8.6).

The order of the attributes is in line with the main visitor survey

- 7.16 The order of the attributes of the Wales experience more or less agrees with the main visitor survey. 'Friendliness of local people' (8.1) and 'quality of the natural environment' (8.0) again are the top two attributes of Wales, followed by safety (7.8). Commercial aspects such as shopping (6.8) are not as strong.

Likelihood of returning



Likelihood of returning much lower than general overseas visitors

- 7.17 About half (48%) of respondents say they either 'definitely' or 'probably' will return to Wales in the next few years. This is much lower than the proportion (81%) giving the same answers in the main overseas visitor survey.
- 7.18 However this probably reflects the conviction of wanting to visit Wales in the first place. Visitors interviewed in the main survey have come to Wales because they specifically wanted to, whereas only one in six (17%) cruise ship respondents say that visiting Wales was a motivation for choosing the cruise.
- 7.19 Interestingly though of the respondents who did not choose the cruise to visit Wales, nearly half (44%) now say they intend to return to Wales in the next few years.

8. Implications for Visit Wales

- 8.1 What is the Overseas 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.
- 8.3 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.
- 8.4 The importance of personal recommendation increases when a destination is less familiar and there is more at stake (e.g. cost, main holiday). Therefore encouraging advocacy is especially important in the overseas visitor market.

The product is right; raising awareness matters

- 8.5 The very high levels of visitor satisfaction indicate that the Wales tourism product offering is attractive to the overseas market. The high proportion (73%) of trips exceeding expectations indicates that awareness of just how good that offering is could improve prior to coming – or more importantly in the case of non-visitors, prior to *deciding not to come*.

Wales appears not to attract its 'fair share' of young overseas visitors to the UK

- 8.6 The age profile of overseas visitors is more evenly spread across age groups than the UK staying visitor profile to Wales. However, the proportion of overseas visitors to Wales aged under 35 (24%) is significantly below the proportion of overseas visitors aged under 35 to the UK (36%).

Castles and historic attractions are a significant draw for the overseas market

- 8.7 Visits to castles and historic attractions during trips to Wales (61% of trips) are significantly higher than any other activity. These should remain a key feature of Visit Wales' marketing overseas.

Quality of the natural environment and friendly people are the USPs

- 8.8 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. This is consistent with the UK visitor market to Wales.

Visitor experience

Equipping hosts in Wales with information

- 8.9 Visiting friends and relatives is the main reason for quite a significant proportion (23%) of total overseas trips.
- 8.10 The *Information Needs* research has revealed that thinking of things to do with overseas visitors is one of the reasons why Welsh residents would like to be more informed about places to go in their own country. Equipping them with this information could help to improve the overseas visitor experience.

Cruise ships

Value of investing resources in this area

- 8.11 Passengers on the cruise ship surveyed appear not to have spent significantly in Wales (£36 per party).
- 8.12 However the ship did bring a large volume of first time visitors to Wales, and many (48%) of those first time visitors now intend to return to Wales in the next few years.
- 8.13 Further research is needed to inform the extent of resources that Visit Wales should invest in this area.

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

Tredeggar 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)

1

7

1

--	--

1

7

7

7

7

7

7

7

1

7

7

7

1

--	--

1

7

9

7

7

7

7

7

1

7

Q16

Q17

--

Q18

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)

[illegible]

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) (follow up question at Q20)	<input type="checkbox"/>	<input type="checkbox"/>
To attend an event / concert / performance / sporting match (follow up question at Q21)	<input type="checkbox"/>	<input type="checkbox"/>
To enjoy the landscape / countryside / beach (follow up question at Q22)	<input type="checkbox"/>	<input type="checkbox"/>
To visit places / historical sites / specific attractions / sightseeing (follow up question at Q23)	<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)

Touring ☐

Wildlife watching ☐

Other ☐

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"/>
<div></div>	

(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
-

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"/>
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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?

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?