

Wales Visitor Survey 2013

REPORT – UK Day Visitors



Llywodraeth Cymru
Welsh Government

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1. Headline Findings

Higher satisfaction ratings during trip than in 2011

- 1.1 Satisfaction ratings with day trips in Wales are up on 2011, especially 'places to visit in Wales', which is up from 8.9 in 2011 to 9.3 in 2013. Day trippers have found many ways to enjoy themselves during the fine summer weather.
- 1.2 The two highest ratings are 'quality of the natural environment' (9.5 – up from 9.2 in 2011) and 'friendliness of people' (9.4 – up from 9.2 in 2011). These are the same average scores as those given by staying visitors.
- 1.3 Attraction ratings are all significantly higher than in 2011. 'Overall enjoyment' of attractions is up significantly from 8.7 to 9.2.

Day trips in/to Wales nearly always meet or exceed expectations

- 1.4 Over half (55%) of new/lapsed visitors and even three in ten (30%) repeat visitors say post-trip that their trip to/in Wales was better than they had expected.

Significant rise in outdoor activities

- 1.5 The motivation to take part in outdoor activities during a day trip in/to Wales has risen significantly from 12% in 2011 to 23% in 2013. The dry and sunny weather this summer compared to 2011 may have played a part in this increase.

Main motivation for day trips differs significantly from staying visits

- 1.6 'To visit places / historical sites / specific attractions / sightseeing' is clearly the most common principal reason for taking a day trip to or in Wales, stated by about two in five (41%) respondents in the face to face survey. However, a much lower proportion (23%) of staying visitors give this as their main reason, whereby 'to enjoy the landscape / countryside / beach' is much more common (42% of staying visitors).

Castles / historic attractions lead the way for day trips

- 1.7 Visiting a castle or historic attraction is the most frequently mentioned specific reason for visiting Wales, featuring in one in five (20%) day trips. This is closely followed by country / forest parks (17% of day trips).

- 1.8 Interestingly visiting the beach (13% of day trips) is only the fourth highest activity undertaken in day visits, whereas it is the top activity in staying visits (46% of visits). It is equalled by visits to museums.

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

- 1.9 Close to half (46%) of day 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 majority (62%) 'strongly agree' that Wales meets that requirement.

UK visitors will come back to Wales for more

- 1.10 The vast majority (82%) of UK day visitors from outside Wales will 'definitely' make another visit to Wales within the next few years. This positive intention to return includes new UK day visitors from outside Wales, whereby most (79%) new visitors from outside Wales 'definitely' intend to return within the next few years.

Extremely high advocacy for Wales

- 1.11 An extremely high proportion (97%) of day visitors say they would 'definitely' recommend Wales to a friend or relative. This is consistent across all regions of Wales visited, origin of visitor and new / lapsed / repeat visitors.

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 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 Day visitor market; UK Staying visitors and Overseas visitors are discussed in separate reports.
- 2.12 The report covers the main face to face survey (1,310 interviews with UK day visitors), and the telephone follow-up survey (314 interviews with UK day 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

Origin of visitors

Origin of visitors (Face to face survey)	Overall		Region of Wales visited			
	2013	2011	North	Mid	South West	South East
Wales – North	12%	*	50%	5%	1%	0%
Wales – Mid	5%	*	2%	43%	2%	1%
Wales – South West	18%	*	1%	15%	69%	8%
Wales – South East	44%	*	1%	15%	25%	75%
England – North	8%	7%	31%	3%	0%	2%
England – Midlands	6%	7%	13%	17%	0%	3%
England – South West	4%	6%	0%	2%	2%	7%
England – South East	2%	3%	2%	1%	0%	3%
UK Other	0%	0%	0%	0%	0%	0%
Sample size	1,273	1,645	280	114	239	640

** The 2011 report did not split origin of Wales visitors by region; Wales visitors in total made up 77% of day visitors, and this compared to 79% in 2013*

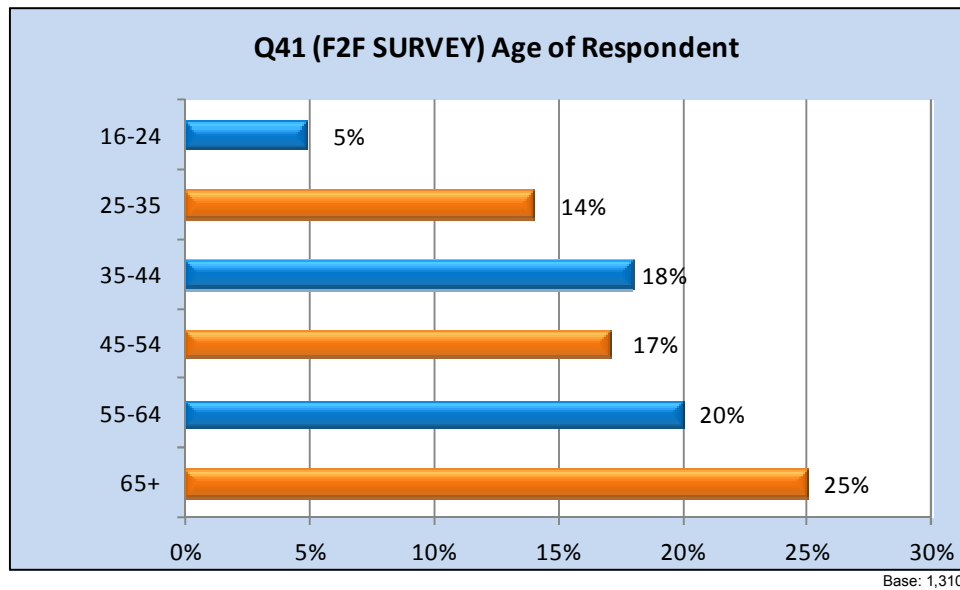
North Wales attracts the highest proportion of day visitors from England compared to other regions of Wales

- 3.1 Close to half (46%) of day visitors to North Wales come from England – a much higher proportion than in the other regions of Wales. South West Wales is the only Welsh region not to share a border with England, and this is reflected in the figures in that only 2% of its day visitors come from outside Wales.

South West Wales attracts a lot of day visitors from South East Wales

- 3.2 A quarter (25%) of day visitors to South West Wales come from South East Wales. This is the highest movement of day visitors from one region to another within Wales.

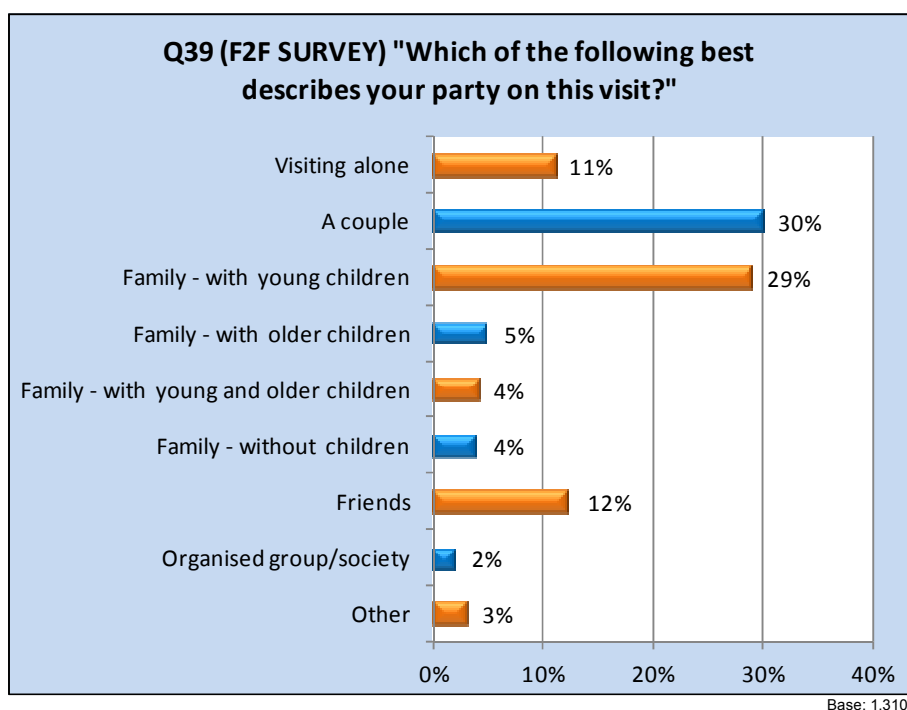
Age of visitors



Age profile very similar to 2011

- 3.3 The age profile of day visitors in/to Wales is very similar to the profile in 2011. Between the ages of 35 and 64, the percentage of visitors reflects the UK population very closely. However, as is also the case with staying visitors, the day visitor age group which is under-represented is the under 35's. This group makes up one third (33%) of the UK adult population, but only 19% of day visitors to Wales.
- 3.4 Differences between region of Wales visited by age are not significant, as was also the case in 2011.

Type of visiting party



Day-trip families in Wales much more likely to include younger children than older children

- 3.5 Wales is an attractive destination for families with young children; visitors' comments suggest that it is child-friendly and there is lots to entertain children.

"Wales is a great place to bring the kids. We will definitely visit again"

UK visitor, West Midlands

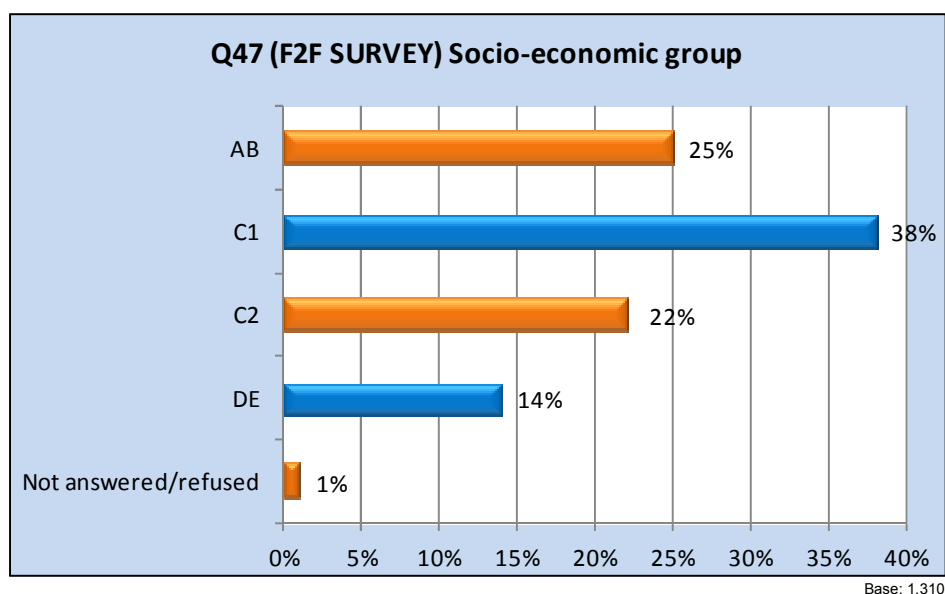
"Wonderful experience for children"

Welsh resident

"It was nice that they had a bouncy castle up so the kids had something to do as well. It's good when families are accommodated more in these places [Anglesey Sea Zoo]"

Welsh resident

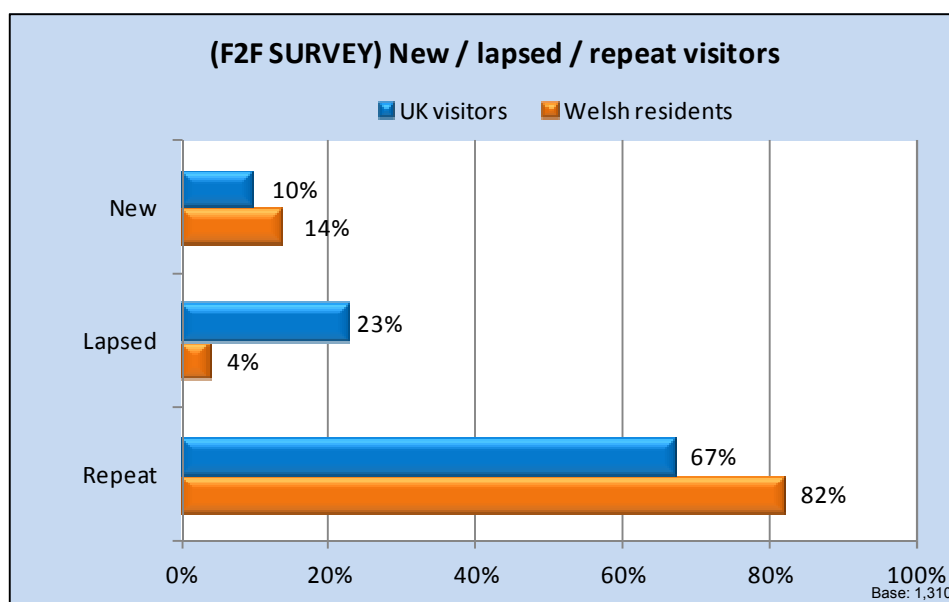
Socio-economic group



ABC1 proportion remains high

- 3.6 Close to two thirds (63%) of day visitors interviewed are in the ABC1 socio-economic group – significantly higher than the UK population (55%). This is very similar to the 2011 profile.
- 3.7 It is hard to say whether the profile is skewed towards ABC1 because Wales is more attractive to that SEG group, or whether ABC1's go on more day trips outside of their local area generally.

New / lapsed / repeat visitors



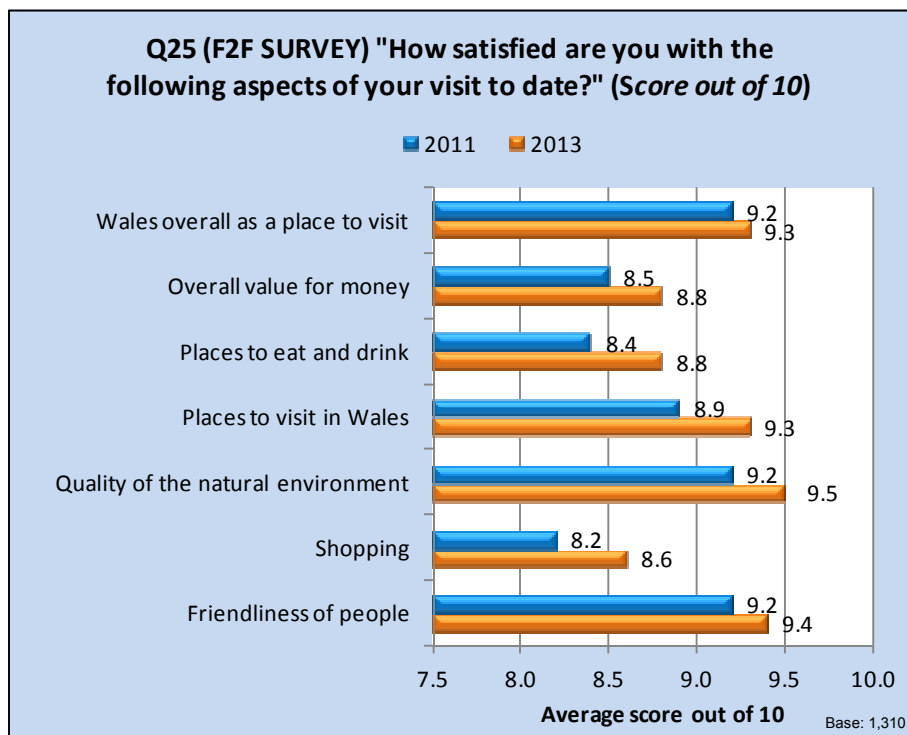
More Welsh residents visiting areas for the first time compared to 2011

- 3.8 Among the Welsh resident sample, about one in seven (14%) respondents have visited an area for the first time. This is significantly higher than in 2011, when 6% of Welsh residents were visiting an area for the first time when interviewed.
- 3.9 Some Welsh residents have commented that they are still discovering new parts of Wales. The *Information Needs* research has also revealed that Welsh residents are very open to learning more about what there is to see and do in Wales.

"It's nice to get out and about and see different places – there are lots of places I haven't discovered yet"
Welsh resident

4. Satisfaction Ratings

Satisfaction ratings – during trip



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

Rating of 'places to visit in Wales' has increased significantly

- 4.1 Satisfaction with 'places to visit in Wales' has risen significantly from 8.9 in 2011 to 9.3 in 2013. Day trippers have found many ways to enjoy themselves.

"I just really like places like the [National] Botanic Gardens, stately homes and beautiful landscapes. That sort of thing is what I look for and fortunately there's plenty around in Wales"

Welsh resident

- 4.2 Having said that, some respondents comment that Wales could do with more indoor attractions for when it rains. The satisfaction rating might not have been as high as 9.3 this year if it weren't for the fine weather through most of the summer.

"There need to be more indoor attractions because Wales doesn't have the best weather"

Welsh resident

‘Quality of the natural environment’ is rated highest

- 4.3 The quality of the natural environment is a key strength of Wales. It scores very highly at 9.5 and is key to both attracting visitors in from England and attracting Welsh residents to see and do things in their own country.

“You can go from lovely coastlines to beautiful mountains within an hour and a half”
Welsh resident

“We visit Wales at least twice a month. We spend more time in Wales than England because we find it more peaceful”
UK visitor, South West England

Friendly folk in Wales

- 4.4 The friendliness of local people is another key strength of Wales. This aspect rates very highly at an average of 9.4.

“The Welshness should come through. Wonderful for a visit and great people”
UK visitor, North West England

Excellent first impression

- 4.5 Overall satisfaction is as high among new visitors (9.3 average) as it is among repeat visitors. With satisfaction so high among new visitors, there is a strong chance of them returning.

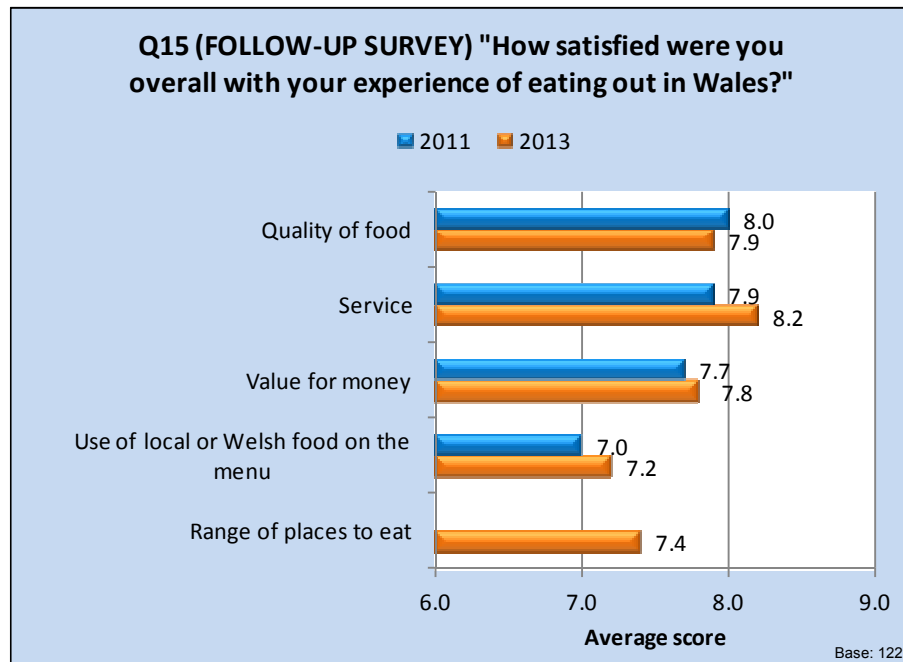
“We’re going back!”
UK visitor, South West England

Commercial aspects of Wales are not as strong

- 4.6 Commercial aspects of the Wales tourism offering such as shopping (8.6) and places to eat and drink (8.8) are not as strong. The staying visitors have given similar ratings to these aspects.

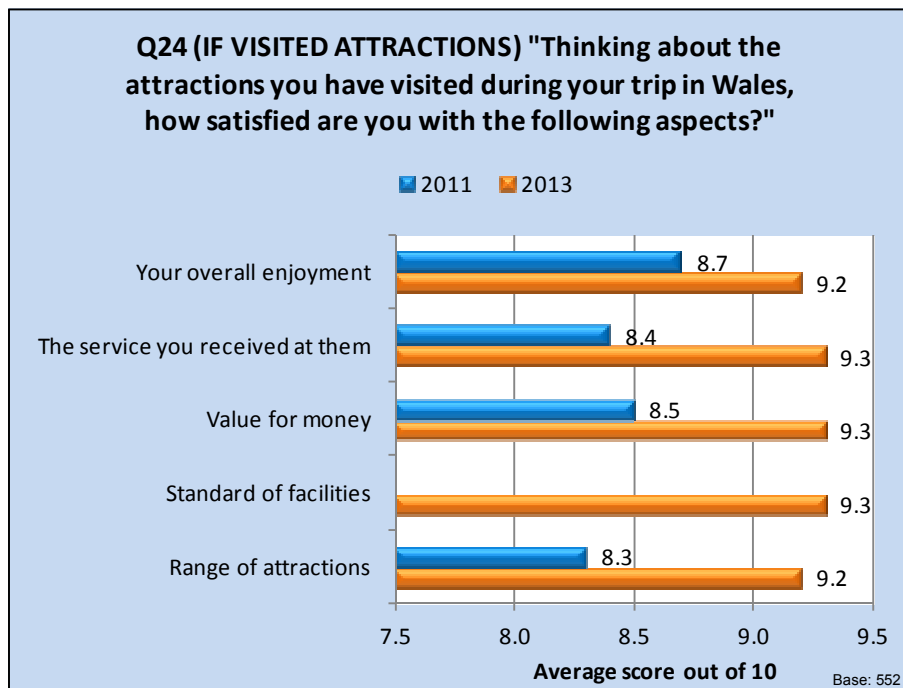
*“I thought that *** was a brilliant trip. It was just spoilt by the standard of food”*
Welsh resident

- 4.7 In the follow-up survey, respondents who ate out have been asked to rate their experience of eating out in Wales. The ratings are about the same as in 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

High level of enjoyment at attractions

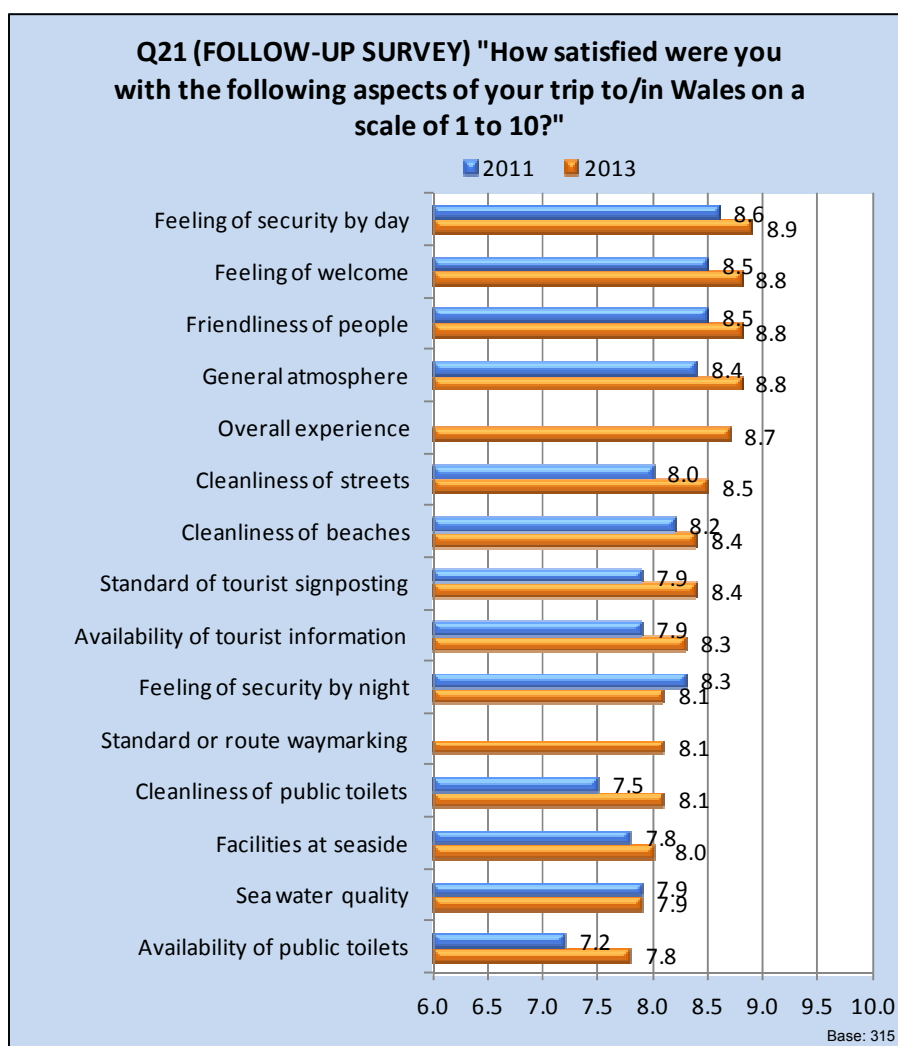
- 4.8 Day visitors to attractions in Wales in 2013 have enjoyed themselves greatly, with the overall average enjoyment score at 9.2.

"I was extremely surprised that Big Pit was free – I thought it was marvellous"
Welsh resident

"St Fagans was great"
Welsh resident

"I think Pembrey is a fantastic facility"
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

Satisfaction with trip is not quite as high post-trip

- 4.9 Overall satisfaction with day trips is quite high post-trip (8.7), but it is not as high as it is when measured during-trip (9.3). The decline in rating post-trip is more significant for day visitors than for staying visitors. This could be because day trips are shorter and therefore they may remain less firm in the memory.
- 4.10 Nearly 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.

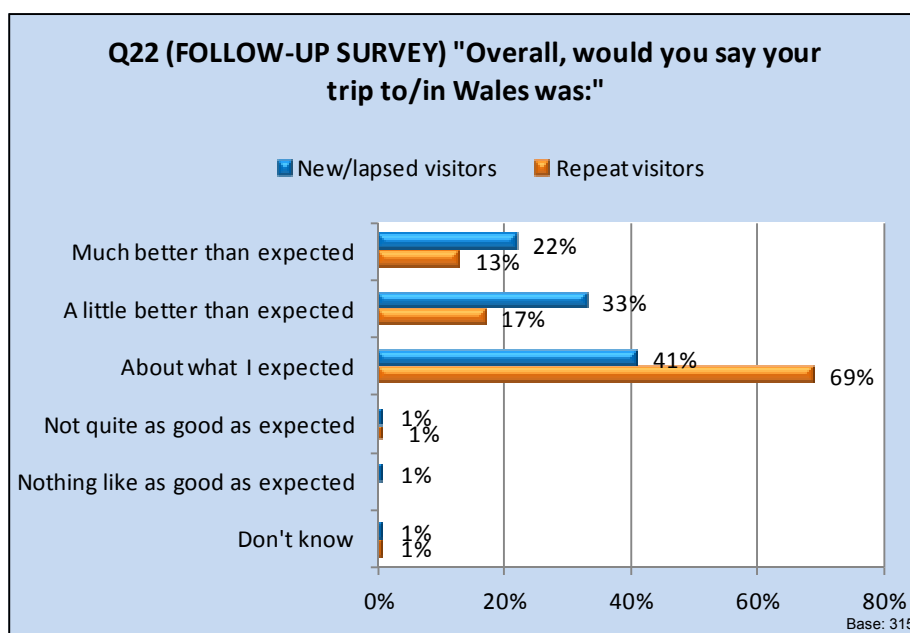
Most aspects are very well rated post-trip

- 4.11 Wales is generally well rated by day visitors as a tourist destination in terms of a number of aspects relating to cleanliness, security and welcome. This is the same finding as for staying visitors.
- 4.12 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.

'Where can I find a loo round here?'

- 4.13 'Availability of public toilets' is the lowest rated aspect of the destination (7.8). The situation is worse in North and Mid Wales, where availability of public toilets averages 7.3, compared to South Wales (8.1).

Experience compared to expectations

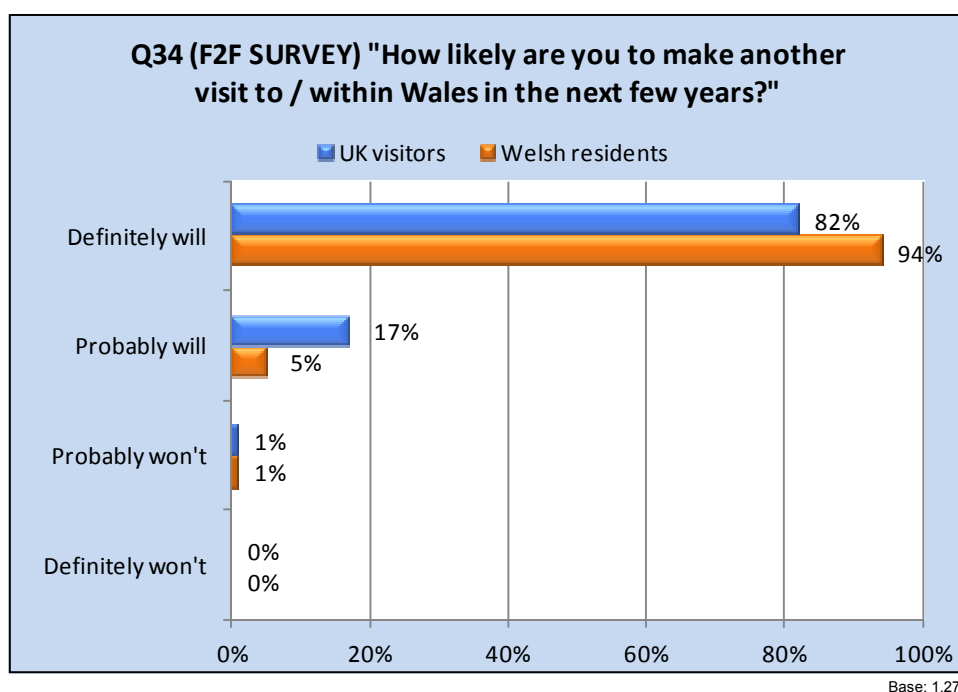


'It was even better than I thought!'

- 4.14 There is a significant difference between what day visitors expect before their trip, and what they end up experiencing. New visitors to Wales / part of Wales visited are particularly taken by surprise, with more than half (55%) saying post-trip that their experience was better than they had expected. Even some (30%) repeat visitors say their trip was better than expected.

"Wales has so much more to offer than anywhere else in the UK"
UK visitor, North West England

Likelihood of returning



UK visitors will come back to Wales for more

- 4.15 The vast majority (82%) of UK day visitors from outside Wales will 'definitely' make another visit to Wales within the next few years. This positive intention to return includes new UK day visitors from outside Wales, whereby most (79%) 'definitely' intend to return within the next few years.
- 4.16 Throughout the different parts of this research (face to face survey, telephone follow-up, focus groups) it comes across strongly that Wales is a destination which people seem to 'fall in love with' from their first visit. The conversion of new visitors into likely repeat visitors appears to be very high.

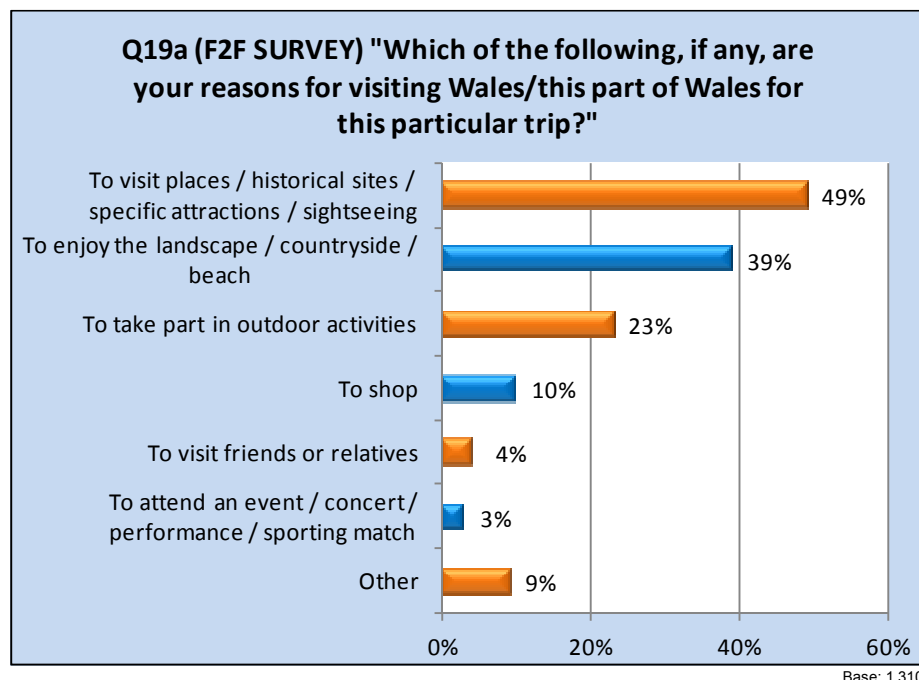
“Amazing – more information would be good to map out the trip next time”
UK visitor, South West England

Likelihood of recommending

- 4.17 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.
- 4.18 Almost all (97%) day visitors would 'definitely' recommend Wales to a friend or relative (measured post-trip). Very high advocacy is consistent across all regions of Wales visited, the origin of the visitor and type of visitor (new / lapsed / repeat).

5. Motivation for Visiting

Overview of motivation



Significant rise in outdoor activities

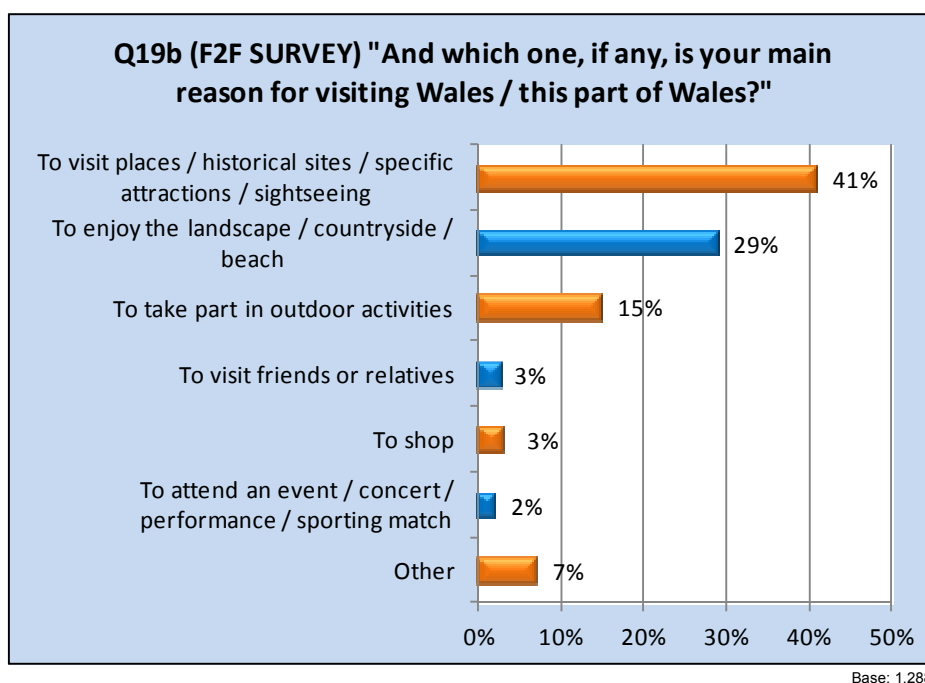
- 4.19 The motivation 'to take part in outdoor activities' during a day trip in/to Wales has risen significantly from 12% in 2011 to 23% in 2013. It is likely that the dry and sunny weather this summer compared to 2011 has played a significant part in this increase.

"Wales has a lot of activities to take part in"
Welsh resident

South East Wales differs from the other three regions

- 4.20 South East Wales is different from the other three regions in terms of motivations to visit. 'To take part in outdoor activities' (motivation for 26% of visitors) is higher than in the rest of Wales (20%), but on the other hand 'enjoying landscape / countryside / beach' (34%) is lower than the rest of Wales (44%).

Main reason for visiting



Main motivation for day trips differs significantly from staying visits

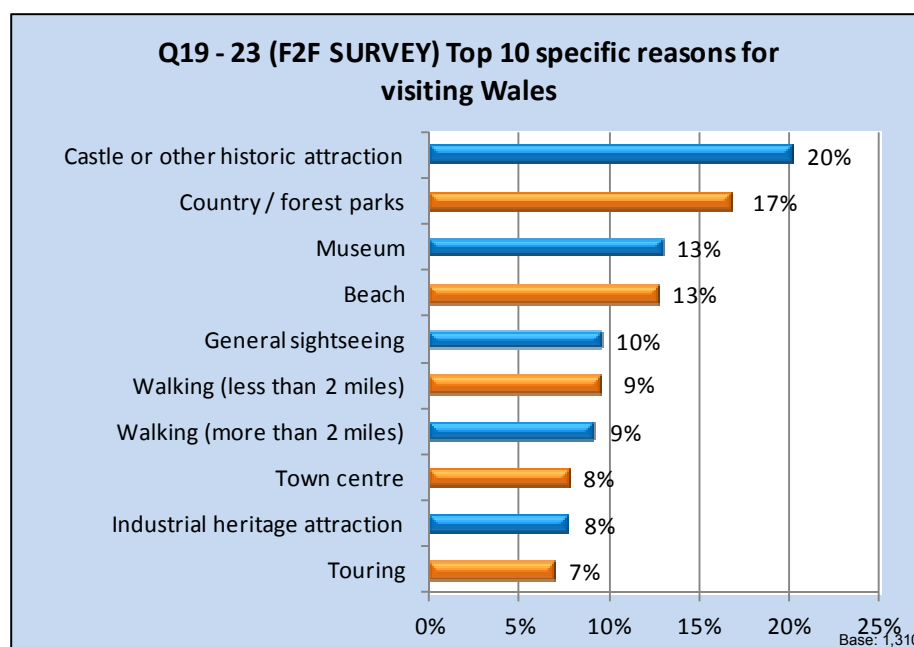
4.21 'To visit places / historical sites / specific attractions / sightseeing' is clearly the most common principal reason for taking a day trip to/in Wales, stated by about two in five (41%) respondents in the face to face survey. However, a much lower proportion (23%) of staying visitors give this as their main reason, whereby 'to enjoy the landscape / countryside / beach' is much more common (42% of staying visitors).

South East Wales differs from the rest of Wales

4.22 As before, South East Wales differs from the other regions in terms of the main motivation for visiting. In the South East, 'visiting places / historical sites etc' (44% of respondents) is the clear most frequently given main reason for visiting – well ahead of the second placed motivation, 'to enjoy landscape / countryside / beach' (25% of respondents).

4.23 In the rest of Wales, there is not much difference between 'visiting places / historical sites etc' (39%) and 'landscape / countryside beach' (32%).

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 lead the way for day trips

- 4.24 Visiting a castle or historic attraction is the most frequently mentioned specific reason for visiting Wales, featuring in one in five (20%) day trips. This is closely followed by country / forest parks (17% of day trips).

“I’d definitely recommend Caerphilly Castle and Castell Coch. They’re good for learning about Wales and our heritage.”
Welsh resident

“We travel a lot in Wales and we love it – the towns, the castles and the parks they’ve created on the coal tips – brilliant”
Welsh resident

- 4.25 Interestingly visiting the beach (13% of day trips) is only the fourth highest activity undertaken in day trips, whereas it is the clear top activity in staying visits. It is equalled by visits to museums.

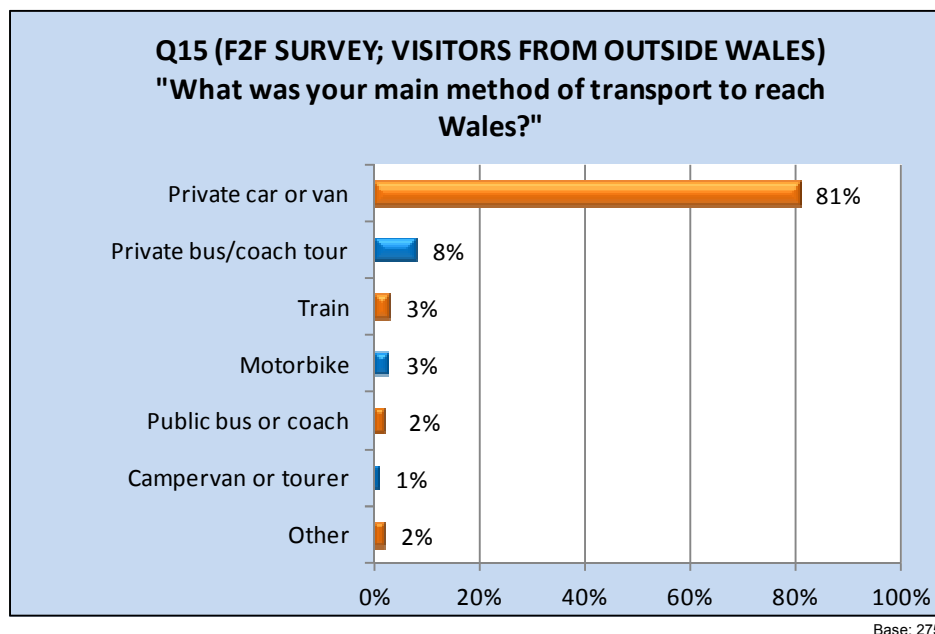
A beautiful destination for walking

- 4.26 About one in ten (9%) day visitors have engaged in walking 'more than 2 miles' during their trip, and the same proportion (9%) have walked 'less than 2 miles'. The next most frequently engaged in physical activity is cycling (3% of day visitors).
- 4.27 Visitors speak very enthusiastically of the beauty of Wales' natural environment, and this fits well with walking.

"Wales is pretty and there are lots of places to go for walks"
Welsh resident

6. Transport and Sustainability

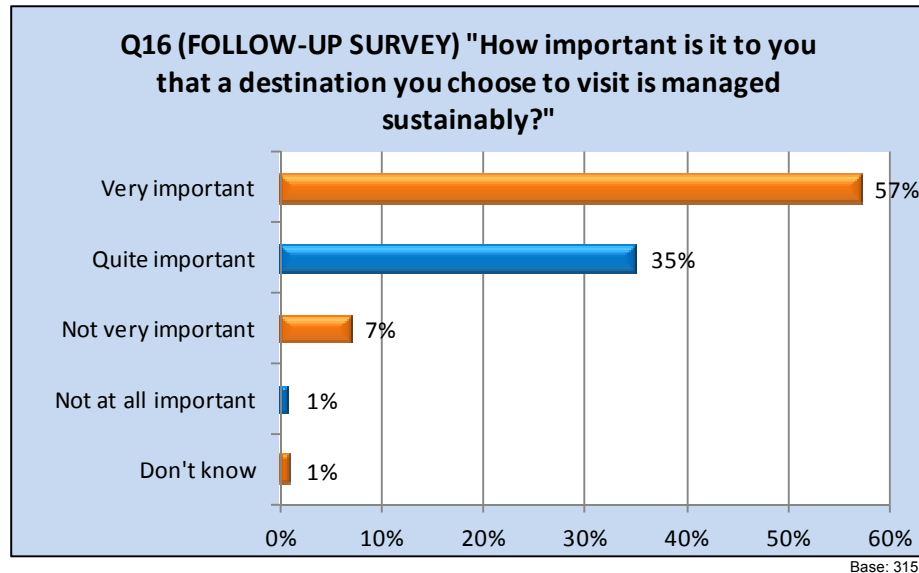
Transport used to get to Wales



No significant changes in transport used to reach Wales

- 4.28 The vast majority (81%) of day visitors coming from outside Wales have used their own car/van to reach Wales. This is very similar to in 2011 (79%).
- 4.29 There are also no significant changes in how visitors have travelled around Wales, with private car/van (80%) still very popular (the same as in 2011). 'Train' (2%) is not significantly different from in 2011, but 'public bus or coach' has fallen from 6% in 2011 to 2% in 2013.
- 4.30 Satisfaction with public transport among those (excluding Welsh residents) who have used it to get around Wales averages 8.0. This is based on only ten respondents and so the sample is too small to break down further and comparisons with 2011 are not reliable.

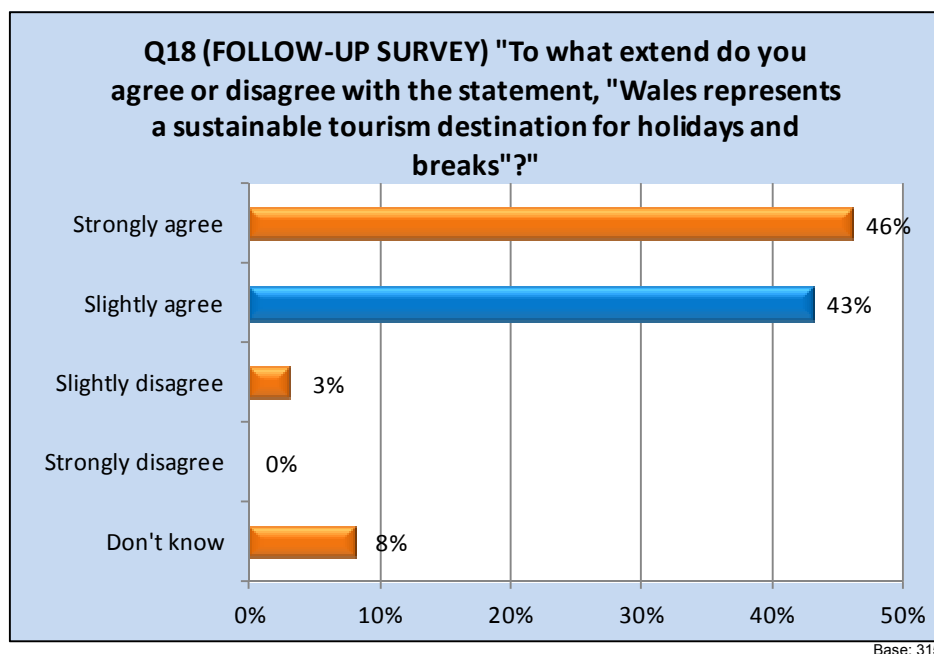
Attitudes towards sustainable destinations



Sustainable destination management is important to visitors to Wales

- 5.1 Over half (57%) of day visitors to Wales believe it is 'very important' that destinations they choose to visit are managed sustainably.
- 5.2 Importance of sustainability correlates with age. The majority (62%) of over 45's believe it is 'very important' that a destination they visit is managed sustainably, compared to a significantly lower proportion (30%) 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

- 5.3 Close to half (46%) of day 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 majority (62%) 'strongly agree' that Wales meets that requirement.
- 5.4 Results also correlate with age. About half (51%) of over 55's 'strongly agree' with the above statements, compared to about a third (36%) of under 35's.

7. Implications for Visit Wales

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

Attracting new and lapsed visitors to and within Wales

Advocacy is key

- 6.2 Satisfaction with trips to/in Wales is extremely high – demonstrated both in the quantified ratings and in the enthusiastic way in which people talk about Wales when being interviewed.
- 6.3 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, and for some, it is the most powerful influence.
- 6.4 Although day trips are not planned anywhere near as extensively or as ‘rigidly’ as staying trips (*taken from the Information Needs research*), the inspiration of where to visit must come from somewhere, and shared experiences often provide this inspiration.
- 6.5 Anything which Visit Wales can do to encourage advocacy among visitors will have a significant impact on (a) attracting new and lapsed visitors into Wales and (b) encouraging more Welsh residents to take more trips within Wales.

The main day visitor market – Welsh residents – are very open to being told about new places to visit

- 6.6 Most (79%) UK day visitors to/in Wales are Welsh residents. The *Information Needs* research has revealed that this group are very open to learning more about what there is to do and see in their own country.

North Wales attracts a significant proportion of its day visitors from England, but Mid and SE Wales do not

- 6.7 Nearly half (46%) of day visitors to North Wales come across the border from England. Mid and South East Wales also share a border with England, but in spite of Mid Wales being close to largely-populated Birmingham and South East Wales being

well connected by motorway to southern England, these regions do not appear to attract the same volumes of day visitors that North Wales attracts.

Quality of the natural environment and friendly people are the USPs

- 6.8 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.

Converting day visitors into staying visitors

- 6.9 Staying trips on average create a lot more value for the tourism industry than day trips, as visitors spend on accommodation (if not VFR) and are in the destination for longer.
- 6.10 With day-trip satisfaction and intentions to return so high, there is a clear opportunity to convert some of these day visitors into staying visitors.

Product development and visitor experience

Commercial aspects need improving

- 6.11 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

- 6.12 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.

Significant increase in outdoor activities – improved awareness or weather-related?

- 6.13 The motivation to take part in outdoor activities has risen significantly since 2011. Visit Wales actively promotes outdoor activities, whilst at the same time the weather was much better in the summer of 2013. It is hard to tell how much each factor has influenced the increase, but future visitor surveys, including the imminent off-peak visitor survey, may shed more light on this.

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) (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		<input type="text"/>	

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		<input type="text"/>	

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="text"/>
8) <i>Science/technology centre</i>	<input type="text"/>
9) <i>Steam/heritage railway</i>	<input type="text"/>
10) <i>Theme park</i>	<input type="text"/>
<i>Town centre</i>	<input type="text"/>
<i>General sightseeing</i>	<input type="text"/>
<i>Other</i>	<input type="text"/>

(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"/>
-----------	--------------------------	----------	--------------------------

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?

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?