

# Research Report

Wales Visitor Survey 2016

Neath Port Talbot



Prepared for:  
Neath Port Talbot County Borough  
Council

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**Contents**

- 1. Executive summary ..... 1
- 2. Aims and objectives..... 4
- 3. Methodology ..... 5
- 4. Research findings..... 6
  - 4.1 Visitor profile..... 6
  - 4.2 Trip profile .....10
  - 4.3 Motivations for visiting and activities undertaken.....11
  - 4.4 Satisfaction with overall experience, revisiting and recommending.....13
  
- Appendix I: Detailed list of survey locations ..... 6
- Appendix II: Stage 1 survey questionnaire (face-to-face interviews) ..... 7
- Appendix III: Stage 2 survey questionnaire (telephone interviews) ..... 8

# 1. Executive summary

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## 1.1 Introduction

This report focuses on **visitors within the Neath Port Talbot unitary authority area**; **456** interviews were conducted at Stage 1 and a further **225** were conducted at Stage 2 with visitors to 3 locations in Neath Port Talbot (see page 4).

This formed part of the 2016 Visit Wales Visitor Survey, which involved two stages of interviewing across Wales: **Stage 1** was a face-to-face survey, followed by a **Stage 2** telephone interview (post-visit). **6,652** face-to-face interviews were conducted at Stage 1, and **3,464** telephone interviews were conducted at Stage 2. Throughout the report, comparisons have been made with the all Wales sample.

The data was weighted at the analysis stage to reflect the proportion of UK day, UK staying and overseas visitors within the region. Fieldwork took place between 11 June and 3 November 2016.

## 1.2 Key findings

### ***Visitor profile:***

The vast majority of visitors to Neath Port Talbot (NPT) are from Wales (90%), which is much higher than when looking at visitors to Wales as a whole (59%). This reflects the very high proportion of day visitors to this area compared to Wales generally (see figure 1 on p10). Following on from this, Neath Port Talbot receives fewer visitors from outside of Wales compared to all sites across Wales (10% cf. 41% all Wales); 9% live in the rest of the UK (cf. 37% all Wales) and just 1% live overseas (cf. 4% all Wales).

There is a slight skew towards more female (53%) than male visitors (47%) in Neath Port Talbot. There are noticeable differences in the gender profile by location; the majority of visitors to Aberdulais Falls and Margam Park are female (67% and 68% respectively), while at Afan Forest Park, most visitors are male (79%).

Neath Port Talbot receives a higher proportion of younger visitors aged 16-34 compared to Wales as a whole (31% cf. 22%). This is being driven by the younger age profile of visitors to Afan Forest Park and Margam Park; at Afan Forest Park, 42% of visitors are aged 16-34 (no doubt coming to use the cycling and walking trails). At Margam Park, younger people make up around a third of visitors (31%), who may be attracted to the site by activities such as Go Ape!, mountain biking trails and water-based activities. In contrast, Aberdulais Falls attracts an older age profile, with over half of visitors (58%) aged 55+.

Over half of visitor groups to the Neath Port Talbot area are families with children (52% compared to 40% across all of Wales); this rises considerably to 77% at Margam Park. Most family groups are visiting with younger children.

The average number of people in each visiting party is 3.3 (2.3 adults and 1.0 children), which is slightly smaller than the all Wales average of 3.7 (2.7 adults and 1.0 children). Group sizes tend to be largest at Margam Park (4.0) and smallest at Afan Forest Park (2.4). The main difference in the composition of groups to these two locations is the number of children (1.6 at Margam Park cf. 0.3 at Afan Forest Park).

***Trip profile:***

The overwhelming majority of visitors to Neath Port Talbot were on a day trip when interviewed (96%); this is significantly higher than the all Wales average of 88%. The remaining 5% of visitors to Neath Port Talbot were staying in Wales, most commonly on a short break (2%). The average number of nights stayed was longer than the overall Wales average (6.9 nights cf. 6.0); staying visitors interviewed at Margam Park were staying in Wales much longer than was found at other locations (9.0 nights).

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

Visitors to Neath Port Talbot were most likely to have come to the area to enjoy the landscape, countryside and beaches (64%), more so than was the case among visitors to Wales as a whole (51%). Three quarters of visitors to Aberdulais Falls came for this reason (75%), while roughly six in ten visited Afan Forest Park and Margam Park to enjoy the countryside. Visitors to NPT were also much more likely to have come to the area to take part in outdoor activities (42% cf. 25% overall); this is driven primarily by the large proportion of visitors to Afan Forest Park coming to the site for outdoor pursuits (81%). Conversely, Neath Port Talbot visitors were less likely to say they had come to visit places, historical sites and attractions than was the case for Wales overall (43% of NPT visitors compared with 51% all Wales) or to shop (7% cf. 12% all Wales). Furthermore, Neath Port Talbot visitors were less likely to have come to the area for a city break (5% cf. 8%).

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

In general, visitors to Neath Port Talbot were highly satisfied with their visit, as was the case among visitors across all of Wales. On a scale of 1 to 10, where 1 was 'very dissatisfied' and 10 was 'very satisfied', nearly eight in ten visitors to NPT (79%) gave a score of either 9 or 10 for *Wales overall as a place to visit*. A further 20% gave more moderate scores of between 5 to 8 / 10, while only 1% of visitors were dissatisfied with their visit - the mean score was 9.3/10 (slightly higher than the all Wales mean score of 9.2).

Their trip to / in Wales exceeded expectations over almost half of visitors to the Neath Port Talbot, with 52% saying that their trip was better than expected. Around two fifths felt that their expectations had been met (43%), while only 2% of visitors to the region said that their trip was not as good as expected.

Virtually all visitors to Neath Port Talbot said they were likely to return in future (95%); 88% said they would definitely visit again (higher than the all Wales average of 86%), while 7% would probably visit again (cf. 9% all Wales). Only a very small proportion of visitors (3%) said they were not likely to make another visit to the region.

Reflecting the high levels of visitor satisfaction and strong likelihood of returning in future, virtually all visitors to Neath Port Talbot said that they would recommend it as a place to visit (99%); 97% would definitely recommend, and 2% would probably recommend the area to friends and family. Only 1% said that they would not recommend NPT as a place to visit.

## 2. Aims and objectives

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Beaufort was commissioned by Visit Wales to conduct the 2016 Wales Visitor Survey, to update findings from the 2013 wave of research and track any changes in the profile, attitudes and satisfaction of visitors to Wales. Three categories of visitors were covered: UK day visitors, UK staying visitors and overseas visitors.

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

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

Local authorities, tourism partnerships and tourism organisations across Wales were offered the opportunity to buy in to the 2016 Visitor Survey by boosting the number of interviews at specific locations, adding new interviewing locations or adding area-specific questions to measure particular local elements of the visitor experience.

This summary report focuses on interviews conducted within the **Neath Port Talbot unitary authority** area, at the following locations:

- Aberdulais Falls
- Afan Forest Park
- Margam Park.

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

### 3. Methodology

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#### 3.1 Overview of approach

Interviewing for the 2016 Wales Visitor Survey took place in two stages:

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

Interviews were conducted with adults aged 16+ who were on a non-routine trip to the area (day trip or staying visitor). General demographic information such as age, gender, social class, ethnicity, disability, residence and composition of the visiting party was gathered in a short face-to-face survey, as well as awareness of advertising, marketing and publicity for Wales (pre-visit). **456** interviews were conducted at Stage 1 across **3 locations** within the Neath Port Talbot unitary authority area.

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

A longer, more in-depth interview was conducted by telephone with a sample of visitors interviewed at Stage 1, after their visit ended. This gathered feedback, post-visit, on their experience as a whole, including perceptions of Wales as a tourism destination, likelihood to revisit and whether they would recommend Wales to friends and relatives. A total of **225** telephone interviews were conducted with visitors to Neath Port Talbot.

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

Fieldwork took place between 11 June and 3 November 2016.

#### 3.2 Samples achieved at Stages 1 and 2 in Neath Port Talbot

<b>Table 1: Locations</b>	<b>Stage 1 Interviews</b>	<b>Stage 2 Interviews</b>
Aberdulais Falls	129	74
Afan Forest Park	141	64
Margam Park	186	87
<b>TOTAL</b>	<b>456</b>	<b>225</b>



## 4. Research findings

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### 4.1 Visitor profile

The vast majority of visitors to Neath Port Talbot (NPT) are from Wales (90%), which is much higher than when looking at visitors to Wales as a whole (59%). This reflects the very high proportion of day visitors to this area compared to Wales generally (see figure 1 on p10). Following on from this, Neath Port Talbot receives fewer visitors from outside of Wales compared to all sites across Wales (10% cf. 41% all Wales); 9% live in the rest of the UK (cf. 37% all Wales) and just 1% live overseas (cf. 4% all Wales).

There are differences, however, between different locations in the region; both Aberdulais Falls and Afan Forest Park receive more visitors from outside of Wales (18% for each) than Margam Park (just 2%).

There is a slight skew towards more female (53%) than male visitors (47%) in Neath Port Talbot. There are noticeable differences in the gender profile by location; the majority of visitors to Aberdulais Falls and Margam Park are female (67% and 68% respectively), while at Afan Forest Park, most visitors are male (79%).

Neath Port Talbot receives a higher proportion of younger visitors aged 16-34 compared to Wales as a whole (31% cf. 22%). This is being driven by the younger age profile of visitors to Afan Forest Park and Margam Park; at Afan Forest Park, 42% of visitors are aged 16-34 (no doubt coming to use the cycling and walking trails). At Margam Park, younger people make up around a third of visitors (31%), who may be attracted to the site by activities such as Go Ape!, mountain biking trails and water-based activities. In contrast, Aberdulais Falls attracts an older age profile, with over half of visitors (58%) aged 55+.

There are also notable differences in the socio-economic profiles of visitors to Aberdulais Falls compared to Afan Forest Park and Margam Park. The former attracts a higher proportion of more affluent AB<sup>1</sup> visitors (52%) compared to the latter (24% and 27% respectively). Across the whole Neath Port Talbot, people in the AB social groups account for 30% of visitors; this is in line with the all Wales average of 32% - see Table 2 overleaf.

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<sup>1</sup> Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

**AB:** Higher and intermediate managerial, administrative and professional occupations

**C1:** Supervisory, clerical and junior managerial, administrative and professional occupations

**C2:** Skilled manual workers

**DE:** Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

<b>Table 2: Demographic profile of visitors</b>	<b>NEATH PORT TALBOT TOTAL %</b>	<b>ABERDULAIS FALLS %</b>	<b>AFAN FOREST PARK %</b>	<b>MARGAM PARK %</b>	<b>ALL WALES %</b>
<b>Area of residence</b>					
Wales	90	82	82	98	59
Rest of the UK	9	16	18	2	37
Overseas	1	2	-	-	4
<b>Gender</b>					
Male	47	33	79	32	44
Female	53	67	21	68	56
<b>Age</b>					
16 - 24 years	7	2	13	5	7
25 – 34 years	24	11	29	26	15
35 – 44 years	25	15	18	33	20
45 – 54 years	15	13	14	15	19
55 - 64 years	15	40	11	10	18
65+ years	13	18	13	10	20
<b>Social grade</b>					
AB	30	52	24	27	32
C1	35	33	35	36	36
C2	20	9	20	23	20
DE	15	7	21	14	13
<b>Welsh speaking</b>					
Fluent	4	2	3	4	7
Non-fluent	10	8	12	8	7
Non-Welsh speaker	87	89	84	88	85
<b>Ethnicity</b>					
White Welsh / British	96	98	94	96	89
White other	2	1	1	3	6
Non-white / other	2	1	4	1	4

Bases = Stage 1 2016: Neath Port Talbot total (456), Aberdulais Falls (129), Afan Forest Park (141), Margam Park (186), all Wales (6,652).

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

Over half of visitor groups to the Neath Port Talbot area are families with children (52% compared to 40% across all of Wales); this rises considerably to 77% at Margam Park. Most family groups are visiting with younger children.

Couples and people visiting with friends each account for around one in six visitor groups to Neath Port Talbot (17% and 16% respectively); more couples visit Aberdulais Falls (32%) compared to other locations in the area, while groups of friends are most likely to be found at Afan Forest Park (37%).

The average number of people in each visiting party is 3.3 (2.3 adults and 1.0 children), which is slightly smaller than the all Wales average of 3.7 (2.7 adults and 1.0 children). Group sizes tend to be largest at Margam Park (4.0) and smallest at Afan Forest Park (2.4). The main difference in the composition of groups to these two locations is the number of children (1.6 at Margam Park cf. 0.3 at Afan Forest Park).

Neath Port Talbot receives a high proportion of repeat visitors, both amongst the small number of people who live outside of Wales and those who live in Wales. Around seven in ten (71%) visitors to Neath Port Talbot (who live outside Wales) have visited before (compared to 64% for all Wales). The average number of visits to the area in the last 3 years is 4.4 (cf. 4.2 all Wales), although this is higher for visitors to Afan Forest Park (6.1 visits) than for visitors to Aberdulais Falls (3.3) or Margam Park (4.7).

Similarly, visitors who live in Wales are more likely to be frequent repeat visitors to Neath Port Talbot, having taken on average 16.7 visits to Wales / this part of Wales in the last year (higher than the all Wales average of 13.1). Afan Forest Park and Margam Park receive a higher number of annual visits (17.3 and 17.2 respectively) compared to Aberdulais Falls (15.0) – see Table 3 overleaf.

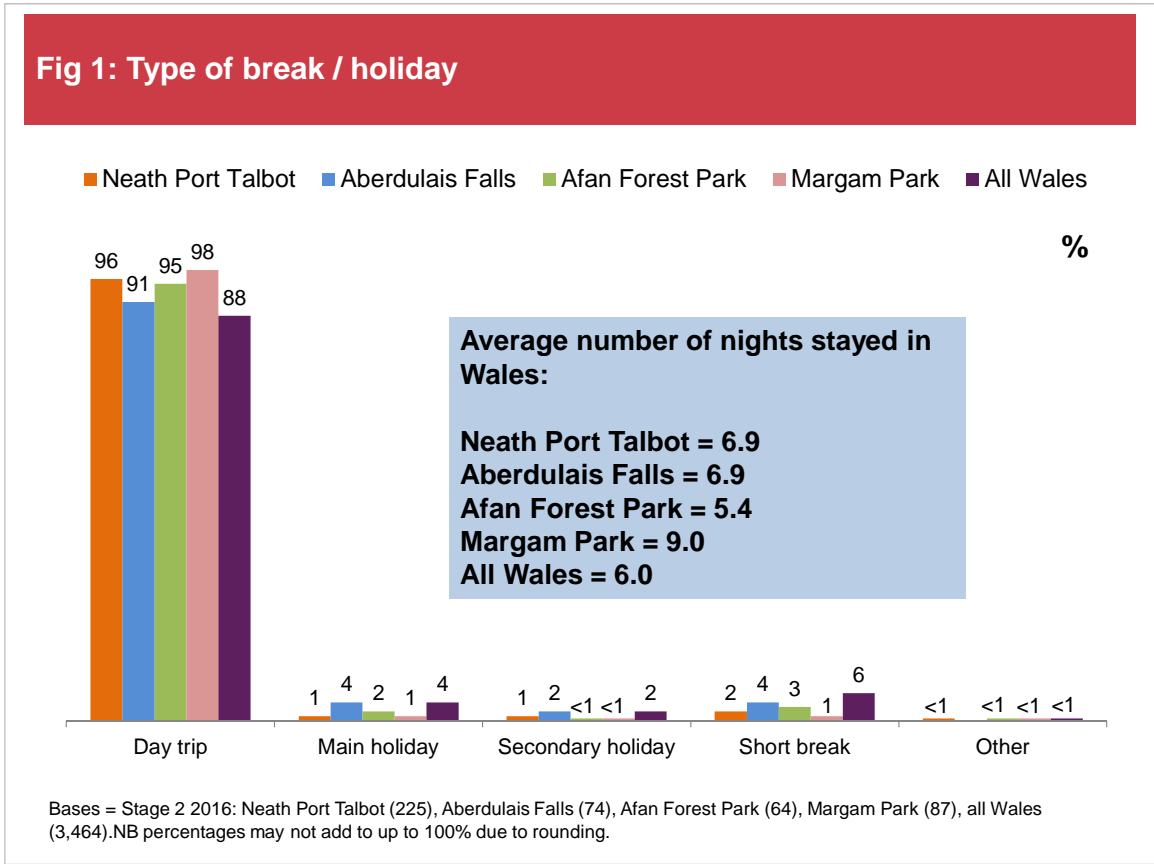
<b>Table 3: Group type and frequency of visiting</b>	<b>NEATH PORT TALBOT TOTAL %</b>	<b>ABERDULAI FALLS %</b>	<b>AFAN FOREST PARK %</b>	<b>MARGAM PARK %</b>	<b>ALL WALES %</b>
<b>Type of visiting party</b>					
Family with young children	48	33	17	71	32
Couple	17	32	20	10	28
Friends	16	5	37	6	12
Family without children	7	25	1	5	7
Visiting alone	6	1	17	1	8
Family with older children	4	3	1	6	5
Organised group / society	2	<1	3	1	2
Family with younger and older children	<1	<1	1	<1	3
Other	<1	2	-	-	1
Refused	<1	-	1	-	1
<b>Average size of party</b>					
Average number of adults	2.3	2.6	2.1	2.4	2.7
Average number of children	1.0	0.6	0.3	1.6	1.0
Average total number of people	3.3	3.2	2.4	4.0	3.7
<b>Frequency of visiting in last three years (live outside of Wales)</b>					
Stage 2 bases in brackets	(Base = 90)	(Base = 43)	(Base = 27)	(Base = 20)	(Base = 1,937)
Once	29	35	22	25	36
2 – 3 times	39	44	30	40	29
4 – 6 times	12	7	19	15	16
7 – 10 times	7	9	4	5	6
More than 10 times	13	5	26	15	12
<b>AVERAGE</b>	<b>4.4</b>	<b>3.3</b>	<b>6.1</b>	<b>4.7</b>	<b>4.2</b>
<b>Frequency of visiting in last year (live in Wales)</b>					
Stage 2 bases in brackets	(Base = 135)	(Base = 31)	(Base = 37)	(Base = 67)	(Base = 1,527)
Once	6	6	5	6	13
2 – 3 times	7	6	11	6	12
4 – 6 times	8	10	5	9	15
7 – 10 times	10	13	8	9	10
11 – 20 times	19	29	14	16	13
More than 20 times	49	35	54	52	35
Don't know	1	-	3	1	2
<b>AVERAGE</b>	<b>16.7</b>	<b>15.0</b>	<b>17.3</b>	<b>17.2</b>	<b>13.1</b>

Bases = Stage 1 2016: Neath Port Talbot total (456), Aberdulais Falls (129), Afan Forest Park (141), Margam Park (186), all Wales (6,652). NB percentages may not add to up to 100% due to rounding. *Some very small base sizes*

## 4.2 Trip profile

The overwhelming majority of visitors to Neath Port Talbot were on a day trip when interviewed (96%); this is significantly higher than the all Wales average of 88%. The remaining 5% of visitors to Neath Port Talbot were staying in Wales, most commonly on a short break (2%).

The average number of nights stayed was longer than the overall Wales average (6.9 nights cf. 6.0); staying visitors interviewed at Margam Park were staying in Wales much longer than was found at other locations (9.0 nights) - see Figure 1 below.



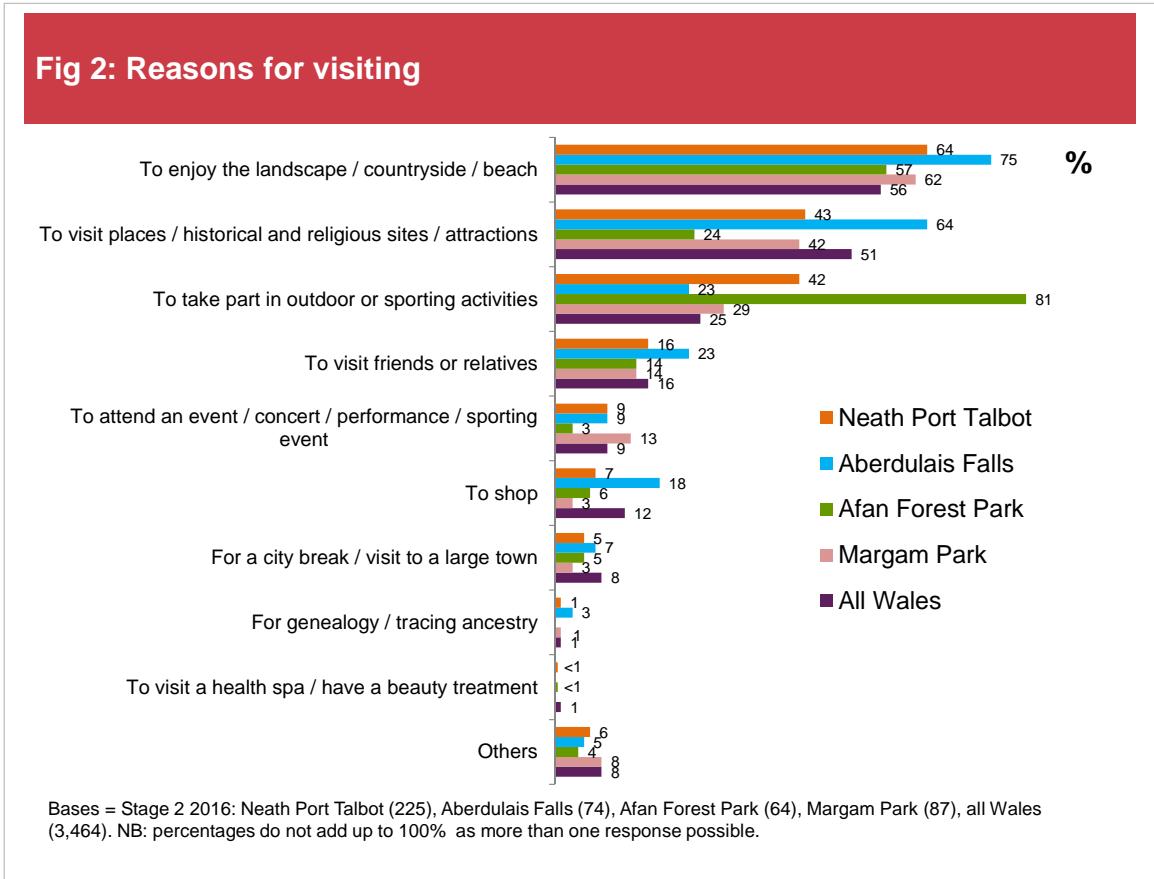
### 4.3 Motivations for visiting and activities undertaken

#### 4.3.1 Reasons for visiting

Visitors to Neath Port Talbot were most likely to have come to the area to enjoy the landscape, countryside and beaches (64%), more so than was the case among visitors to Wales as a whole (51%). Three quarters of visitors to Aberdulais Falls came for this reason (75%), while roughly six in ten visited Afan Forest Park and Margam Park to enjoy the countryside. Visitors to NPT were also much more likely to have come to the area to take part in outdoor activities (42% cf. 25% overall); this is driven primarily by the large proportion of visitors to Afan Forest Park coming to the site for outdoor pursuits (81%).

Conversely, Neath Port Talbot visitors were less likely to say they had come to visit places, historical sites and attractions than was the case for Wales overall (43% of NPT visitors compared with 51% all Wales) or to shop (7% cf.12%). Furthermore, Neath Port Talbot visitors were less likely to have come to the area for a city break (5% cf. 8%).

It should be noted that these motivating factors will be determined to a large extent by the nature of the interviewing locations, all of which were outdoor attractions - see Figure 2 below.



#### 4.3.2 Main activities undertaken while in Neath Port Talbot

Looking in more detail at the specific activities undertaken by visitors interviewed in Neath Port Talbot; the most popular activity by far was visiting a country park (44%), which was mentioned by twice as many people as was seen across the whole of Wales (22%). This is driven primarily by the fact that one of the interviewing locations (Margam Park) was a country park, and is reflected in the high number of visitors mentioning this at this site (50%).

General sightseeing was mentioned by a quarter of visitors to NPT (24%), slightly lower than was seen across the whole of Wales (27%), while visiting a castle or garden was mentioned by a fifth of visitors (22% and 21% respectively). Visits to gardens were higher than the overall Wales figure of 14%, and is again influenced by visitors to Margam Park (where 32% of visitors mentioned this activity).

As might be expected, over seven in ten visitors to Afan Forest Park took part in mountain biking or cycling (71%), much greater than the all Wales average of 6%, and reflects the offering at this location. Furthermore, more visitors to Neath Port Talbot went walking in the area than for Wales as a whole (27% cf. 20% all Wales); walking was more popular at Margam Park and Afan Forest Park (30% and 29% respectively) than at Aberdulais Falls (22%) – see Table 4 below for more details.

<b>Table 4: Most popular individual activities</b>	<b>NEATH PORT TALBOT TOTAL %</b>	<b>ABERDULAI FALLS %</b>	<b>AFAN FOREST PARK %</b>	<b>MARGAM PARK %</b>	<b>ALL WALES %</b>
Visit country parks / forest parks	44	33	44	50	22
General sightseeing	24	33	13	26	27
Visit a castle or other historic attraction	22	24	3	32	24
Visit gardens	21	17	10	29	14
Walking more than 2 miles	18	7	23	21	14
Visit a wildlife attraction / nature reserve	16	17	11	19	10
Visit a nature-based attraction	16	17	8	19	13
Visit a museum or heritage centre	16	30	11	11	19
Mountain biking	14	-	52	-	3
Visit the beach	13	22	11	10	23
Walking less than 2 miles	9	15	6	9	6
Visit an industrial heritage site	9	35	-	2	7
Visit an animal-based attraction	9	-	3	17	6
Wildlife watching	8	11	5	7	7
Visit a religious site	7	7	-	10	7
Cycling	5	-	19	<1	3

*Bases = Stage 2 2016: Neath Port Talbot total (225), Aberdulais Falls (74), Afan Forest Park (64), Margam Park (87), all Wales (3,464).*

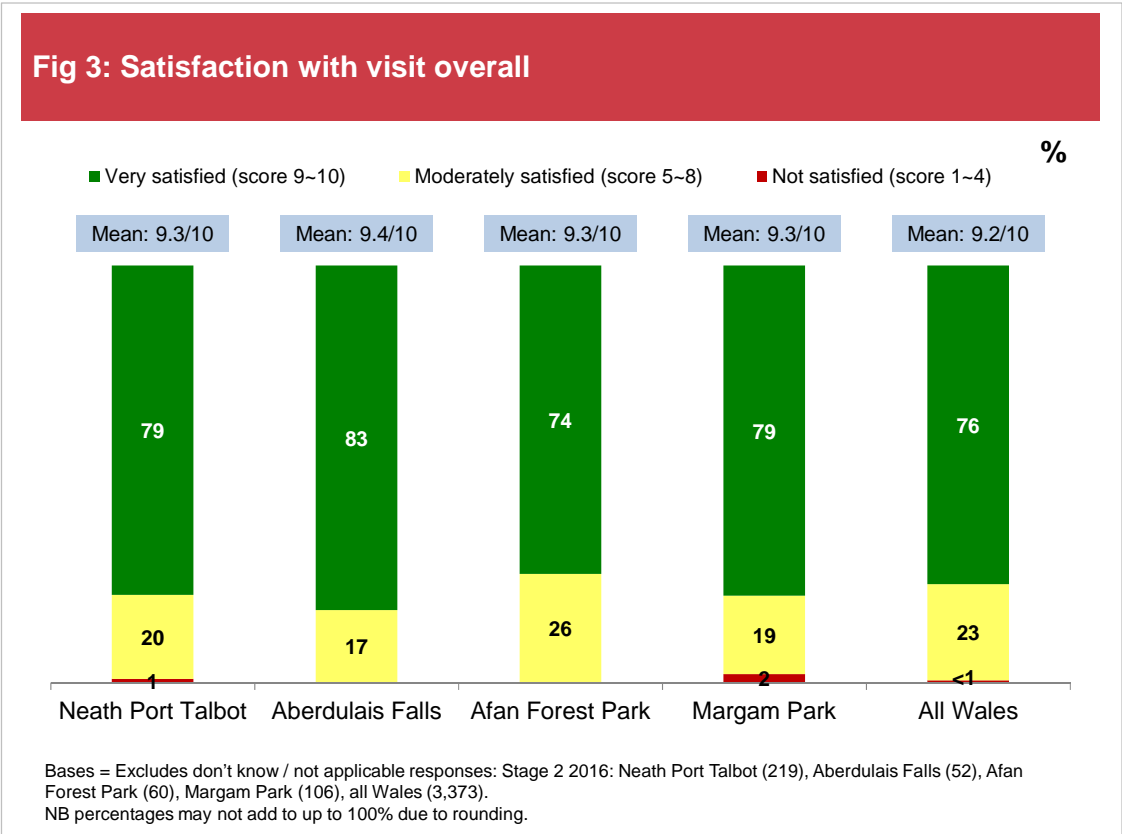
*NB percentages do not add to up to 100% as more than one response possible.*

## 4.4 Satisfaction with overall experience, revisiting and recommending

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

In general, visitors to Neath Port Talbot were highly satisfied with their visit, as was the case among visitors across all of Wales. On a scale of 1 to 10, where 1 was ‘very dissatisfied’ and 10 was ‘very satisfied’, nearly eight in ten visitors to NPT (79%) gave a score of either 9 or 10 for *Wales overall as a place to visit*. A further 20% gave more moderate scores of between 5 to 8 / 10, while only 1% of visitors were dissatisfied with their visit - the mean score was 9.3/10 (slightly higher than the all Wales mean score of 9.2).

Satisfaction levels were highest at Aberdulais Falls, with 83% giving a score of 9 or 10. In contrast, at Afan Forest Park, satisfaction scores were slightly lower than the all Wales average (74% giving a high score) – see Figure 3 below.



There were a few noticeable differences in satisfaction levels across different types of visitor; repeat visitors were more likely to give a ‘Very satisfied’ score than new visitors (79% cf. 67%), with the same being said of visitors aged 16-54 (81%), compared to those aged 55+ (77%).

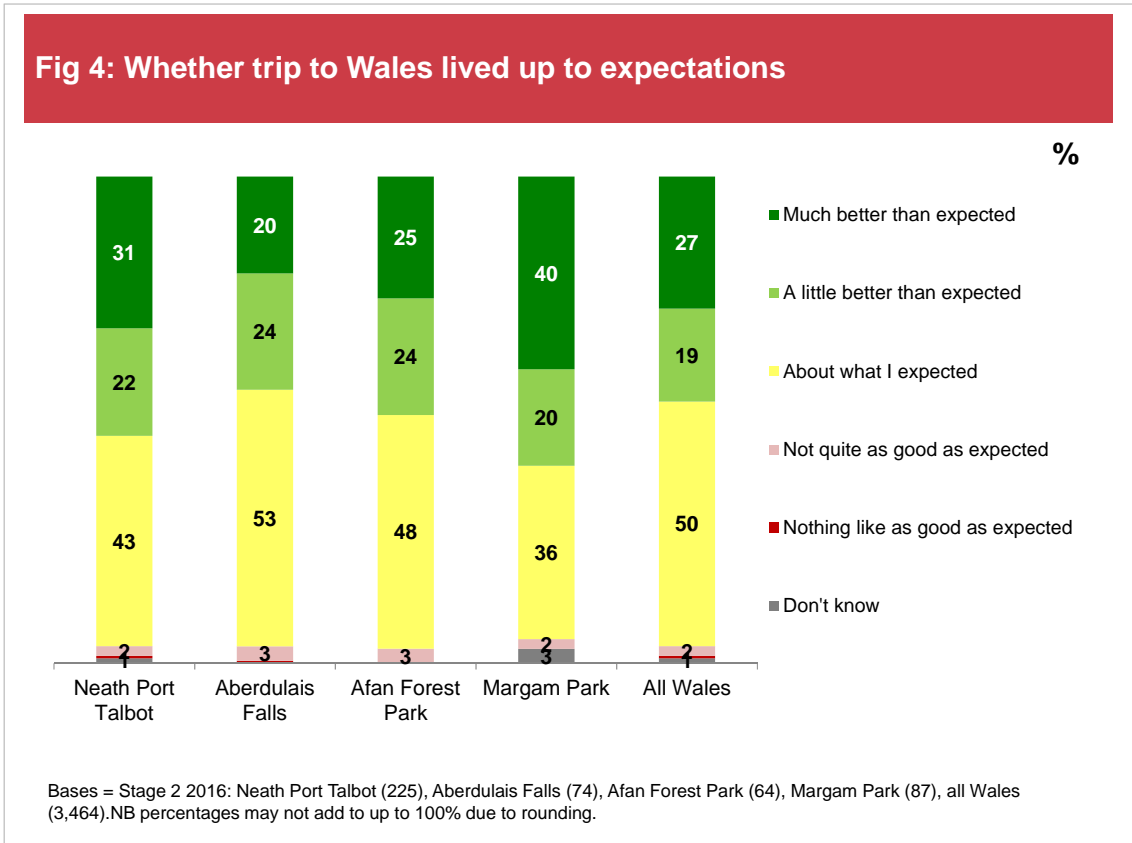


4.4.2 Expectations

Wales exceeded expectations for over half of visitors to Neath Port Talbot, with 53% saying that their trip was better than expected; this rose to 60% amongst visitors to Margam Park, but declined to 44% amongst visitors to Aberdulais Falls.

Around two fifths their expectations had been met (43%); only 2% of visitors to the region said that their trip was not as good as expected.

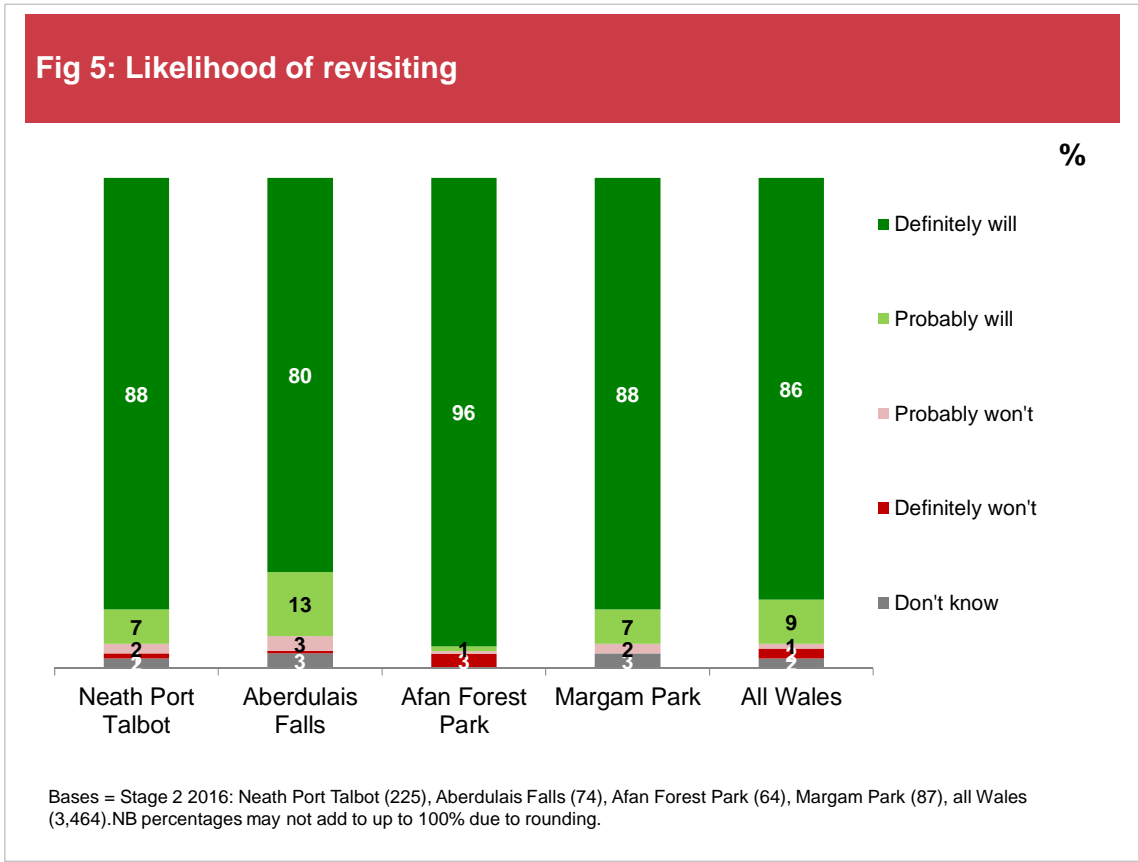
Comparing results for Neath Port Talbot to Wales as a whole; a higher proportion of visitors to NPT felt that their trip was much better than expected than was said across the whole of Wales (31% cf. 27%); this is primarily driven by findings from Margam Park, where 40% of visitors felt that their expectations had been greatly exceeded - see Figure 4 below.



4.4.3 Returning to Wales in future

Virtually all visitors to Neath Port Talbot said they were likely to return in future (95%); 88% said they would definitely visit again (higher than the all Wales average of 86%), while 7% would probably visit again (cf. 9% all Wales). Visitors to Afan Forest Park are more likely to definitely return (96%) compared to other locations in the area (88% Margam Park and 80% Aberdulais Falls); this will link to the high proportion of repeat visitors to Afan Forest Park (95% - see p.9).

Only a very small proportion of visitors said they were not likely to make another visit to the region (3%) – see Figure 5 below.



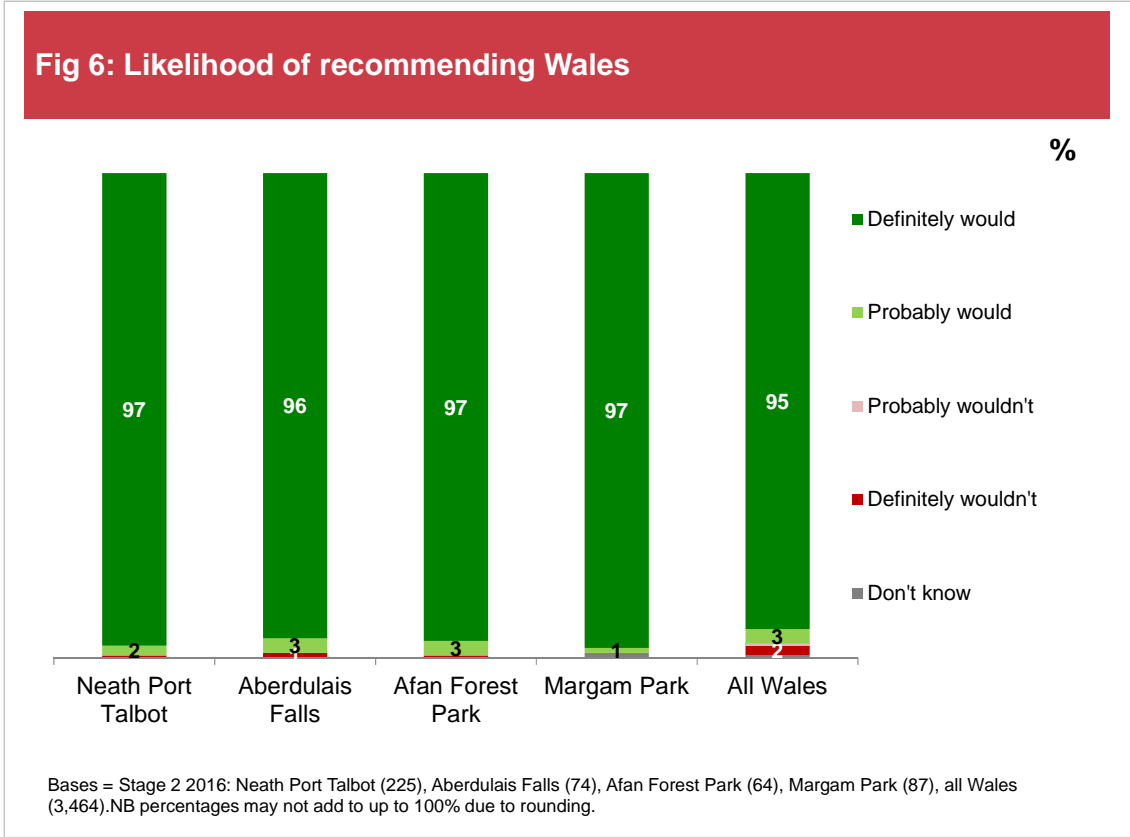
As might be expected, visitors who lived in Wales were most likely to say that they would definitely visit again (89%), although 82% of visitors from the rest of the UK said the same.

Virtually all new visitors to the area said they would definitely return (99%) compared to 90% of repeat visitors saying they would definitely visit again.

4.4.4 Recommendation

Reflecting the high levels of visitor satisfaction and strong likelihood of returning in future, virtually all visitors to Neath Port Talbot said that they would recommend it as a place to visit (99%); 97% would definitely recommend, and 2% would probably recommend the area to friends and family. Only 1% said that they would not recommend NPT as a place to visit.

The findings for Neath Port Talbot are comparable across the three locations in the region and in line with those seen across the whole of Wales, where 97% would recommend Wales and only 2% would not – see Figure 6 below.



Visitors from Wales were more likely to say they would definitely recommend the area as a place to visit (98%) compared to visitors from the rest of the UK (89%), and new visitors were slightly more likely to definitely recommend the area (99%) compared to repeat visitors (97%).

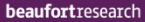
## Appendix I: Detailed list of survey locations

Table 6: Individual survey locations by region of Wales		
Region	Attraction	Partner buy-in organisation (if applicable)
North Wales	Anglesey Sea Zoo	
	Bala / Llyn Tegid	Snowdonia National Park
	Beaumaris Town Centre	
	Beddgelert	Snowdonia National Park
	Betws-y-Coed	
	Caernarfon Town Centre	
	Conwy Town Centre	
	Dolgellau	Snowdonia National Park
	Erddig	
	Holyhead Ferry Terminal / Station	Anglesey County Council
	Llanberis	
	Llandudno Promenade	
	Llangollen Town Centre	
	Pontcysyllte Aqueduct	
	Porthmadog Town Centre	
Rhyl Promenade		
Wepre Country Park		
Wrexham Town Centre		
Mid Wales	Aberaeron	
	Aberystwyth Promenade	
	Brecon Town Centre	
	Cardigan Town Centre	
	Devil's Bridge	
	Elan Valley Visitor Centre	
	Knighton / Presteigne	
	Lake Vyrnwy	Powys County Council
	Machynlleth	
	National Library of Wales	
	New Quay	
Powis Castle		
Rhayader	Powys County Council	
Storey Arms		
Welshpool Town Centre		

Region	Attraction	Partner buy-in organisation (if applicable)
West Wales	Aberdulais Falls Afan Forest Park Fishguard Town Centre Margam Park National Botanic Garden of Wales National Waterfront Museum Newton House, Dinefwr Pembrey Country Park Rhossili, Gower St David's Town Centre Tenby Town Centre	
South Wales	Abergavenny Town Centre Barry Island Seafront Big Pit National Mining Museum Bike Park Wales Blaenafon Iron Works Brecon Mountain Railway Bryn Bach Park Caerleon Roman Baths Caerphilly Castle Cardiff Castle Chepstow Town Centre Cosmeston Country Park Cwmcarn Forest Drive Cyfartha Castle Dare Valley Country Park Festival Park Llancaiach Fawr Manor Millennium Centre / Bay Monmouth Town Centre National Museum Cardiff Newport City Centre Penarth Pier Porthcawl Promenade Rhondda Heritage Park Royal Mint Experience St Fagans National History Museum Tintern Abbey Tredegar House	Monmouthshire County Council   South East Wales Tourism Group       South East Wales Tourism Group      South East Wales Tourism Group      Monmouthshire County Council   South East Wales Tourism Group   South East Wales Tourism Group

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

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  2 Museum Place, Cardiff CF10 3BG	<b>B01613-1</b>  <b>VISIT WALES</b>  <b>VISITOR SURVEY 2016</b>  <b>STAGE 1 (FINAL)</b>	<b>FOR OFFICE USE ONLY</b>		<b>TIME OF INTERVIEW</b> (7)	<b>DAY OF INTERVIEW</b> (8)	<b>WEATHER</b> (9)
	Case (1-4)	Point (5-6)	10.00am – 12pm 1 12.01pm – 2pm 2 2.01pm – 4pm 3 4.01pm – 6pm 4	Weekday 1 Weekend 2 Bank Holiday 3	Sunshine 1 Cloud 2 Rain 3 Other 4	

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

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

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

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

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

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

<p><b>(IF LIVE OUTSIDE OF WALES)</b></p> <p><b>Q5</b> Is this your first visit to Wales? (22)</p> <p>Yes..... 1</p> <p>No..... 2</p> <p>Don't know / can't remember..... 3</p>	<p><b>Q11 Marital status (33)</b></p> <p>Married or equivalent..... 1</p> <p>Single, never married..... 2</p> <p>Widowed, divorced or separated..... 3</p>				
<p><b>(IF LIVE IN WALES)</b></p> <p><b>Q6</b> Is this your first visit to this part of Wales? (23)</p> <p>Yes..... 1</p> <p>No..... 2</p> <p>Don't know / can't remember..... 3</p>	<p><b>Q12</b> Are there any children under the age of 15 in your household who you are responsible for (as parent, legal guardian)? (34)</p> <p>Yes..... 1</p> <p>No..... 2</p>				
<p><b>(ASK ALL) – SHOWCARD B</b></p> <p><b>Q7</b> Which of the following best describes your party on this visit? (24)</p> <p><b>SINGLE CODE</b></p> <p>Visiting alone..... 1</p> <p>A couple..... 2</p> <p>Family – with young children..... 3</p> <p>Family – with older children..... 4</p> <p>Family – with young and older children..... 5</p> <p>Family – without children..... 6</p> <p>Friends..... 7</p> <p>Organised group / society..... 8</p> <p>Other..... 9</p>	<p><b>Q13 Working status (36)</b></p> <p>Working full time (30+ hrs per week)..... 1</p> <p>Working part time (&gt; 29 hrs per week).... 2</p> <p>Full time education..... 3</p> <p>Retired..... 4</p> <p>Looking after the home..... 5</p> <p>Full time carer..... 6</p> <p>In training..... 7</p> <p>Other..... 8</p>				
<p><b>Q8</b> How many people are in your visitor party today, including yourself? (24)</p> <p><b>WRITE IN NO. OF ADULTS &amp; CHILDREN</b></p> <table border="1" data-bbox="127 1232 718 1355"> <thead> <tr> <th>ADULTS</th> <th>CHILDREN</th> </tr> </thead> <tbody> <tr> <td style="height: 20px;"></td> <td style="height: 20px;"></td> </tr> </tbody> </table> <p style="text-align: center;">(25-27) (28-30)</p>	ADULTS	CHILDREN			<p><b>Q14 Status in household (37)</b></p> <p><b>READ OUT - The Chief Income Earner</b> is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source.</p> <p>Chief income earner..... 1</p> <p>Other adult (aged 16+)..... 2</p>
ADULTS	CHILDREN				
<p><b>Q9 Gender (31)</b></p> <p>Male..... 1</p> <p>Female..... 2</p>	<p><b>Q15 Occupation of Chief Income Earner (last job if retired) (37)</b></p> <p>Actual job</p> <p>_____</p> <p>Position / grade</p> <p>_____</p>				
<p><b>Q10 Age (32)</b></p> <p>16-19..... 1    55-64..... 6</p> <p>20-24..... 2    65-74..... 7</p> <p>25-34..... 3    75-84..... 8</p> <p>35-44..... 4    85+..... 9</p> <p>45-54..... 5    Refused..... A</p>	<p><b>Q16 Social grade (38)</b></p> <p>AB..... 1</p> <p>C1..... 2</p> <p>C2..... 3</p> <p>DE..... 4</p>				



<b>SHOWCARD C</b>	
<b>Q17</b> What is your ethnic group? (39)	
White British.....	1
White Welsh.....	2
Other White.....	3
White and Black Caribbean.....	4
White and Black African.....	5
White and Asian.....	6
Other Mixed.....	7
Indian.....	8
Pakistani.....;	9
Bangladeshi.....	A
Other Asian.....	B
Caribbean.....	C
African.....	D
Other Black.....	E
Chinese.....	F
Other .....	G

<b>SHOWCARD E</b> (44-47m)	
<b>Q19</b> Have you seen or heard any of these types of advertising, marketing and publicity for Wales before your visit today?	
<b>CAN MULTI-CODE</b>	
TV advertising.....	1
TV programme.....	2
Cinema advertising.....	3
Radio advertising or programmes.....	4
Read an article in a newspaper or magazine (print or online).....	5
Saw an adverts, flyer or supplement in a newspaper / magazine.....	6
Outdoor advertisements (eg posters, bus sides, airports, stations).....	7
Online ads (inc. still or moving ads)...	8
Social media (online e.g. Facebook, Twitter etc.).....	9
The official tourist board website www.visitwales.com.....	A
Other websites (e.g. TripAdvisor).....	B
Word of mouth / conversations with others in person.....	C
Direct mail / flyer.....	D
Email newsletter.....	E
Other.....	F
None of these.....	G

<b>SHOWCARD D</b>	
<b>Q18</b> Do you or does anyone else in your party have any of the following conditions or impairments? You can tell me the letter next to each one if you prefer. (40-43m)	
<b>CAN MULTI-CODE</b>	
<b>A</b> Mobility impairment (wheelchair user).....	1
<b>B</b> Mobility impairment (non-wheelchair user).....	2
<b>C</b> Blind.....	3
<b>D</b> Partially sighted.....	4
<b>E</b> Deaf.....	5
<b>F</b> Partial hearing loss.....	6
<b>G</b> Learning difficulties.....	7
<b>H</b> Long-term illness (e.g. AIDS, arthritis, cancer, diabetes).....	8
None of these .....	9

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

**RECORD CONTACT DETAILS BELOW - READ THESE BACK TO CHECK**  
**REMINDE CONTACT DETAILS WILL ONLY BE USED FOR PURPOSES OF RESEARCH**

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

Telephone number: LANDLINE \_\_\_\_\_ MOBILE \_\_\_\_\_

**IF OVERSEAS – RECORD COUNTRY (ASK WHICH STATE THEY LIVE IN IF USA):** \_\_\_\_\_

**THANK YOU FOR YOUR TIME – WE WILL CALL YOU IN A FEW WEEKS – PROVIDE LEAFLET**

*Interviewer Declaration:* I declare that I have conducted this interview face to face with the above named person (who is unknown to me) according to your instructions:

<b>Signature</b>	<b>Date of Interview (dd/mm)</b>
	(49)(50)(51)(52)

<b>WRITE IN YOUR INTERVIEWER NUMBER</b> →	(53)	(54)	(55)	(56)
---	------	------	------	------

<b>B01613</b>	<b>Accompanied</b>	Yes 1	<b>Supervisor signature:</b>	<b>QUOTA</b> (57)
		No 2		UK DAY 1
				UK STAYING 2
				OVERSEAS STAYING 3
				OVERSEAS DAY 4

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

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**B01613-2**  
**Visit Wales Visitor Survey Stage 2**  
**Telephone Survey Questionnaire (FINAL)**

**CASE NUMBER (FROM STAGE 1)**

**CONTACT NAME:**

**TELEPHONE NUMBER:**

**WELSH SPEAKER:**

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

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

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

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

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

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

English

Welsh

**SECTION 1 – VISITING WALES**

**ASK IF STAYING VISITOR (FROM SAMPLE)**

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

Once in three years

2 – 3 times

4 – 6 times

7 – 10 times

More than 10 times

Don't know / can't remember

**ASK IF DAY VISITOR (FROM SAMPLE)**

**Q2** How many times in the last year have you taken a day trip in/to Wales [use wording 1 if live in Wales / wording 2 if live outside Wales), including the recent trip when we interviewed you? **READ OUT AS NECESSARY**

Once in the last year

2 – 3 times

4 – 6 times

7 – 10 times

11 – 20 times

More than 20 times

Don't know / can't remember

**ASK IF STAYING VISITOR (FROM SAMPLE)**

**Q3** What type of trip was your recent trip in/to Wales [use wording 1 if live in Wales / wording 2 if live outside Wales)? **READ OUT**

Main holiday of the year  
Secondary / additional holiday  
Short break  
Other (**please specify**)

Don't know / can't remember

**ASK IF STAYING VISITOR (FROM SAMPLE)**

**Q4** Did you stay in any other countries (in Europe) besides Wales on your recent trip?

Yes – England → **Q5**  
Yes – Scotland → **Q5**  
Yes – NI → **Q5**  
Yes – Ireland → **Q5**  
Yes – other European country/ies (**please specify**) → **Q5**  
No, just stayed in Wales → **Q7**

Don't know / can't remember → **Q7**

**ASK IF YES AT Q4**

**Q5** How many nights did you stay in any other countries besides Wales during your recent trip?  
**WRITE IN NUMBER**

\_\_\_\_\_

Don't know / can't remember

**ASK IF YES AT Q4**

**Q6** Which one of the following statements best applies to your trip?  
**READ OUT – SINGLE CODE**

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

Don't know / can't remember

**ASK ALL STAYING VISITOR (FROM SAMPLE)**

**Q7** And thinking about your time in Wales, were you based in one location during your recent visit or did you stay overnight in several places or tour around the country? **SINGLE CODE**

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

Don't know / can't remember

## SECTION 2 – TRAVELLING IN AND AROUND WALES

### ASK IF OVERSEAS VISITOR (FROM SAMPLE)

**Q8** What was your main method of transport to reach Britain? **SINGLE CODE - RECORD DETAILS OF STATION / FERRY PORT / AIRPORT**

Train – including Channel Tunnel (**specify arrival station**) \_\_\_\_\_

Ferry – car passenger (**specify arrival port**) \_\_\_\_\_

Ferry – foot passenger (**specify arrival port**) \_\_\_\_\_

Plane (**specify arrival airport**) \_\_\_\_\_

Other (**please specify how and where arrived**) \_\_\_\_\_

Don't know / can't remember

### ASK IF DAY OR STAYING VISITOR FROM OUTSIDE WALES (FROM SAMPLE)

**Q9** What was your main method of transport to reach Wales?  
**READ OUT AS NECESSARY - SINGLE CODE - RECORD IN COLUMN A**

### ASK ALL

**Q10** What method/s of transport did you use to get around Wales [IF STAYING VISITOR] / to get to [SITE NAME] on the day we interviewed you [IF DAY VISITOR]?  
**READ OUT AS NECESSARY - CODE ALL MENTIONED – COLUMN B**

	<b>Q9</b>	<b>Q10</b>
	<b>Column A</b>	<b>Column B</b>
	(Single)	(Multi)
Private car or van		
Hired car or van		
Train		
Public bus or coach		
Private bus/coach excursion/tour		
Bike		
Motorbike		
On foot		
Taxi		
Water taxi or bus		
Boat or yacht		
Campervan or tourer		
Ferry – car passenger		
Ferry – foot passenger		
Plane ( <b>specify arrival airport</b> ) _____		
Other ( <b>please specify how and where arrived</b> ) _____		
Don't know / can't remember		

### **SECTION 3 – ACTIVITIES UNDERTAKEN**

#### **ASK ALL**

**Q11** Which of the following were your reasons for visiting Wales [IF LIVE OUTSIDE OF WALES] / visiting the part of Wales where we interviewed you a few weeks ago [IF LIVE IN WALES]? **READ OUT – CODE ALL MENTIONED – RECORD IN COLUMN A**

#### **IF MORE THAN ONE CODED AT Q11 ASK Q12 – POPULATE WITH RESPONSES FROM Q11**

**Q12** And which one was your main reason for visiting Wales / visiting the part of Wales where we interviewed you? **READ OUT – SINGLE CODE – RECORD IN COLUMN B**

To take part in outdoor or sporting activities (e.g. walking, cycling, fishing etc.) → **Q13**

To attend an event / concert / performance / sporting event → **Q14**

To enjoy the landscape / countryside / beach → **Q15**

To visit places / historical sites / religious sites / specific attractions / sightseeing → **Q16**

For a city break / visit to a large town → **Q16**

To shop

To visit friends or relatives (including also special events such as weddings or graduations)

To visit a spa or have a beauty or health treatment

For genealogy / to trace my ancestry

Other (**please specify**)

Don't know / can't remember

#### **ASK IF CODE 1 AT Q11**

**Q13** Which of the following did you take part in during your trip? **PROBE** Any other outdoor or sporting activities? **READ OUT – CODE ALL MENTIONED**

Walking (less than 2 miles)

Walking (more than 2 miles)

Cycling

Mountain biking

Fishing - sea

Fishing - course / game

Golf

Horse riding / pony trekking

Adventure sports, e.g. canoeing, rafting, climbing or mountaineering

Water sports

Canal / boating trip

Swimming (indoor or outdoor)

Field sports e.g. hunting / shooting

Other (**please specify**)

Don't know / can't remember

#### **ASK IF CODE 2 AT Q11**

**Q14** Which of the following did you attend during your trip? **PROBE** Any other events, concerts or sporting events?

**READ OUT – CODE ALL MENTIONED**

Sporting event

Live concert

Theatre or cinema performance

Arts / cultural festival / Eisteddfod

Music festival

Food / drinks festival

Activity event e.g. walking festival, cycle race, charity run

Other (**please specify**)

Don't know / can't remember

**ASK IF CODE 3 AT Q11**

**Q15a** Which of the following did you do during your trip? **PROBE** Any other ways of enjoying the landscape / countryside / beaches? **READ OUT – CODE ALL MENTIONED**

- Visit the beach → **Q15b**
- Visit country parks / forest parks
- Visit a wildlife attraction / nature reserve
- Visit gardens
- Guided walk
- Wildlife watching
- Other (**please specify**)

Don't know / can't remember

**ASK IF VISITED A BEACH AT Q15a**

**Q15b** Certain beaches in Wales have received awards for quality and cleanliness, such as the Blue Flag Award, Green Coast Award and Seaside Award. How important are these awards to you when choosing a beach to visit?

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

- Very important
- Fairly important
- Not very important
- Not at all important

Don't know

**ASK IF CODE 4 OR 5 AT Q11**

**Q16** Which of the following did you visit during your trip? **PROBE** Any other places, historical sites, religious sites or attractions? **READ OUT – CODE ALL MENTIONED**

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

**GO TO Q17**

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

**GO TO SECTION 4**

**ASK IF CODE 1-10 AT Q16**

**Q17** Thinking about the attractions you visited during your trip in Wales, how satisfied were you with the following aspects? Please use a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied. **READ OUT – RANDOMISE ORDER OF STATEMENTS**

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

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

**SECTION 4 – EATING OUT**

**ASK ALL**

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

Yes → **Q19**

No → **GO TO SECTION 5**

Don't know / can't remember → **GO TO SECTION 5**

**ASK IF YES AT Q18**

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

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

**READ OUT**

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember



## SECTION 5 – ACCOMMODATION

### **ASK IF STAYING VISITORS (FROM SAMPLE)**

**Q20** During your stay in Wales, what type of accommodation did you mainly use?

**READ OUT AS NECESSARY - SINGLE CODE**

- Hotel
- B&B or Guesthouse
- Farmhouse
- Caravan (touring / campervan / motorhome)
- In rented static caravan
- In own static caravan
- Camping
- Self-Catering in rented house, villa, cottage, apartment or flat
- Serviced apartment
- Friend's / relative's home
- Someone else's home on a commercial basis (e.g. airbnb)
- Own second home / time share
- Holiday camp/village
- Hostel
- Alternative accommodation, e.g. Yurt, Tee-Pee, Tree House, Hut, Ecopod etc.
- Boat
- Cruise ship
- University accommodation
  
- Other(**please specify**)
- Don't know / can't remember

### **ASK IF STAYING VISITOR (FROM SAMPLE)**

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

**SINGLE CODE**

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

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

**ASK IF STAYING VISITOR (FROM SAMPLE)**

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

- Quality
- Service
- Value for money
- Overall satisfaction

**READ OUT**

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

Not applicable

**ASK IF STAYING VISITOR (FROM SAMPLE)**

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

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

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

Through a deals site (e.g. Groupon, kgb, etc.)

Through the [www.visitWales.com](http://www.visitWales.com) website

Through a travel agent or tour operator

Through a tourist information centre

Just turned up → **SKIP Q24**

Other (**please specify**) → **SKIP Q24**

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

**ASK IF STAYING VISITOR (FROM SAMPLE) AND BOOKED IN ADVANCE**

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

Book accommodation and travel together via the same provider as part of a package

Book accommodation and travel separately with different providers

Book accommodation only – no travel booked

Don't know / can't remember

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

### **ASK ALL**

**Q25** In planning and gathering information for your recent trip in/to Wales [use wording 1 if live in Wales / wording 2 if live outside Wales), did you use online information sources, offline, or both? By offline, we mean sources of information not found on the internet. **READ OUT – SINGLE CODE**

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

Don't know / can't remember

### **ASK IF USED ONLINE SOURCES (1 OR 3 AT Q25)**

**Q26** Did you use..? **READ OUT – CODE ALL MENTIONED**

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

Don't know / can't remember

### **ASK IF WEBSITE CODED AT Q26**

**Q27** Can you remember which types of website you or your party used to plan your trip before you went? **DO NOT PROMPT – CODE ALL MENTIONED**

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

Don't know / can't remember

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

**Q28** What offline sources of information did you or your party use before you went?  
**DO NOT PROMPT – CODE ALL MENTIONED**

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

Don't know / can't remember

**ASK ALL**

**Q29** Thinking now about information sources used during your trip in/to Wales, which one of the following best describes what you or your party used? **READ OUT - SINGLE CODE**

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

Don't know / can't remember

**ASK IF USED ONLINE SOURCES (1 OR 3 AT Q29)**

**Q30** How did you or your party access online information during your trip?  
**DO NOT PROMPT – CODE ALL MENTIONED**

Mobile phone or other handheld device  
Own laptop  
Tablet  
Laptop or computer at friend's or relative's house  
Computer elsewhere (e.g. accommodation, internet cafe, TIC, library)  
Other (**please specify**)

Don't know / can't remember

**ASK IF USED ONLINE SOURCES (1 OR 3 AT Q29)**

**Q31** Did you use..? **READ OUT – CODE ALL MENTIONED**

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

Don't know / can't remember

**ASK IF WEBSITE CODED AT Q31**

**Q32** Can you remember which types of website you or your party used during your trip?  
**DO NOT PROMPT – CODE ALL MENTIONED**

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

Don't know / can't remember

**ASK IF CODED 2 OR 3 AT Q29**

**Q33** What offline sources of information did you or your party use during your trip?  
**DO NOT PROMPT – CODE ALL MENTIONED**

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

Don't know / can't remember

**ASK ALL**

**Q34** Have you seen or heard any advertising, marketing or publicity for 'Year of Adventure 2016'?  
**SINGLE CODE**

Yes  
No

Don't know / can't remember

**IF YES AT Q34**

**Q35** To what extent did the 'Year of Adventure 2016' influence your decision to visit Wales?  
Please give me a number between 1 and 10 where 1 = 'It had no influence at all' and 10 =  
'It was the only reason I visited Wales'. **SINGLE CODE**

1 - No influence at all

2

3

4

5

6

7

8

9

10 – Only reason I visited

Don't know / can't remember

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

**ASK ALL**

**Q36** How important is it to you that the accommodation you choose to visit is managed sustainably? By 'sustainably' we mean preserving the environment and being fair-trade.  
**READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS**

Very important

Quite important

Not very important

Not at all important

Don't know

**ASK ALL**

**Q37** To what extent do you agree or disagree with the statement "Wales represents a sustainable tourism destination for holidays and breaks"?  
**READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS**

Strongly agree

Slightly agree

Slightly disagree

Strongly disagree

Don't know

**ASK ALL**

**Q38** Thinking about your recent visit in/to Wales [use wording 1 if live in Wales / wording 2 if live outside Wales), did any of the following include aspects or features that were distinctively Welsh, or had a particular local character?

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

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

Any others **(please specify)**

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

**ASK ALL**

**Q39** And how important, or not, is it to you that..? **READ OUT IN TURN – RANDOMISE ORDER**

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

**INVERT SCALE BETWEEN RESPONDENTS**

- Very important
- Quite important
- Not very important
- Not at all important

Don't know

**SECTION 8 – SATISFACTION / OVERALL EXPERIENCE**

**ASK ALL**

**Q40** How satisfied were you with the following aspects of your trip to/in Wales on a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied? *Instruction: code 'not applicable' if any don't apply.* **READ OUT – RANDOMISE ORDER**

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

**SINGLE CODE**

- 1 – Very dissatisfied
- 2
- 3
- 4
- 5
- 6

- 7
- 8
- 9
- 10 – Very satisfied
- Not applicable
- Don't know

**ASK IF CODED 1-7 FOR STATEMENT 1 – ‘WALES OVERALL AS A PLACE TO VISIT’**

**Q41** Why did you give a score of [SCORE GIVEN] when asked about your overall experience during your recent trip? What would have improved your experience or encouraged you to give Wales a higher score? **PROBE** – Anything else?  
**RECORD VERBATIM**

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Nothing  
Don't know

**ASK ALL**

**Q42** Overall, would you say your trip to/in Wales was...?  
**READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS**

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

Don't know

**ASK ALL**

**Q43** How likely are you to make another visit in / to Wales in the next few years?  
**READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS**

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

Don't know

**ASK ALL**

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

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

Don't know

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



**ASK ALL**

**Q45** Finally, do you have any other comments you would like to make about your trip to/in Wales? **RECORD VERBATIM**

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No other comments

**ASK ALL**

**Q46** Would you be willing to be re-contacted by Visit Wales or selected partners to take part in further research?

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

Yes - willing to be re-contacted - **RECORD NAME AND TELEPHONE NUMBER**

No

**Thanks very much for your time.**

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

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

**Thanks again and goodbye.**

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[www.beaufortresearch.co.uk](http://www.beaufortresearch.co.uk)