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Wales Visitor Survey 2016: UK Staying Visitors

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Authors: Fiona McAllister/Sarah McDonough

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

For further information please contact:

Dr Robert Lewis

Knowledge and Analytical Services

Welsh Government

QED Centre, Treforest Industrial Estate

Pontypridd, Rhondda Cynon Taf, CF37 5YR

Tel: 0300 061 6026

Email: robert.lewis@wales.gsi.gov.uk

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1. Executive summary

1.1 Introduction

Visit Wales, the Tourism arm of the Welsh Government, is one of the co-sponsors of a number of Britain-wide studies designed to determine the volume and value of tourism. While these studies generate the official statistics on the volume and value of tourism and also provide useful data on visitor characteristics, they do not measure visitor satisfaction, which is a key element in encouraging repeat visits.

Visit Wales therefore commissions its own large-scale visitor survey focusing on Wales, designed to assess the profile, attitudes and satisfaction of visitors and to track any changes on these measures over time. Three categories of visitor are covered: **UK day visitors, UK staying visitors and overseas visitors.**

The approach used for the 2016 survey was:

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

Information about the profile of visitors and their trip was gathered in a short face-to-face interview with a sample of visitors aged 16 and over at 72 tourism locations across Wales. A total of 6,652 interviews were conducted:

- 2,959 with UK day visitors
- 2,892 with UK staying visitors
- 801 with overseas visitors.

Nearly all fieldwork took place between 11 June and 30 September 2016.

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

A longer, more in-depth interview was conducted by telephone after their trip / holiday ended with a sample of visitors interviewed at Stage 1, to gather feedback on their whole visit. A total of 3,464 interviews were conducted at Stage 2:

- 1,504 with UK day visitors
- 1,641 with UK staying visitors
- 319 with overseas visitors.

All interviews were conducted using CATI (Computer Assisted Telephone Interviewing) technology. Fieldwork took place between 7 July and 3 November 2016.

1.2 Key findings

Visitor profile:

The profile of UK staying visitors has shown only marginal changes since 2013; the majority live outside of Wales (86%) and they are most likely to be aged 35-54 and fall into the ABC1 social classes. However there has been an increase in the number of younger visitors aged 16-34 years in 2016, with a corresponding decrease in the over 55's.

Wales continues to attract couples and families, as was seen in 2013. Visit frequency remains consistent with 2013 findings, with roughly equal proportions having visited once in the last three years (31%), 2-3 times (31%) or 4 times or more (38%).

Trip profile:

Wales is primarily a short-break destination rather than a main holiday destination; as was seen in 2013, just over half UK staying visitors came to Wales for a short break (55%), while around two fifths (41%) visited for a longer holiday; 25% overall said their trip to Wales was their main holiday of the year.

Motivations for visiting and activities undertaken:

Reasons for visiting were largely consistent with 2013 results, with the key motivations being Wales' countryside and landscape and to visit places and attractions. The most popular activities undertaken in Wales were as follows:

Table 1: Most popular activities undertaken in Wales ALL UK staying visitors	%
(Base = 1,641)	
Visit the beach	42
General sightseeing	38
Visit a castle or historic attraction	38
Visit country parks / forest parks	31
Walking more than two miles	24
Visit a museum or heritage centre	24
Visit a wildlife attraction / nature reserve	16
Visit gardens	15
Visit a nature-based attraction	15
Visit a religious site	14
Wildlife watching	13
Visit an industrial heritage attraction	12
Visit a steam / scenic railway	10
Visit an art gallery or exhibition	8
Visit an animal-based attraction	8
Walking less than two miles	6

Satisfaction with the overall experience:

In general, UK staying visitors are highly satisfied with their trip to Wales, giving an average score of 9.2/10 for *Wales overall as a place to visit* (comparable to 2013). The quality of the natural environment receives the highest score of all specific dimensions evaluated (9.0/10). Poor weather is the main factor contributing to lower satisfaction scores.

Just over half of UK staying visitors (53%) said Wales exceeded their expectations (rising to 70% amongst new visitors). Moreover, over 9 in 10 UK staying visitors said that they would visit Wales again in future (95%) and nearly all would recommend Wales to others as a place to visit (97%).

Marketing awareness and information:

Two thirds of UK staying visitors had seen any advertising, marketing or communications for Wales before their visit; most of these said they had seen advertising on TV (41% of visitors overall).

The majority of UK staying visitors used some information sources to plan their trip to Wales (78%); online sources (such as websites and apps) were used most frequently (71%; up from 57% in 2013), while offline sources (such as guidebooks and leaflets) were used by around one in four (27%; up from 18% in 2013). Visitors' usage of information during their trip is lower – just under 6 in 10 used any information sources whilst in Wales, with a more even balance between online and offline sources (at 35% and 38% respectively).

Accommodation used and eating out:

A variety of different types of accommodation in Wales were used by UK staying visitors in 2016; hotels and self-catering accommodation were most popular, each being used by a fifth of visitors.

There has been a sharp fall in booking directly through the accommodation provider (44% did so in 2016 cf. 70% in 2013), although this remains the most common method of booking the accommodation or package. In contrast, the use of third-party booking sites such as booking.com and expedia has increased (now at 25% cf. 8% in 2013). On the whole, visitors were positive about the accommodation they stayed in, with almost two thirds saying they were very satisfied overall with it (63%).

Over 8 in 10 UK staying visitors ate out during their visit to Wales (81%); this is a sizeable increase from 2013 (60%). Satisfaction with various aspects of the eating out experience in Wales varied, with satisfaction highest for service (49% very satisfied) and lowest for the use of local or Welsh produce on the menu (only 24% very satisfied).

Conclusions:

- Although the age profile of visitors is skewed towards the 35-54 age group, there has been an increase in the proportion of 16-34s coming to Wales in 2016, with a corresponding decrease in the proportion of older visitors (aged 55+). This could be the result of Visit Wales' marketing of activity tourism and its promotion of activity holidays to younger visitors, intended to generate revenue from additional short breaks into Wales, although in part, this may be influenced by the addition of outdoor activity sites to the interviewing locations (e.g. Bike Park Wales). The increase in younger visitors may also be influenced by the 2016 Year of Adventure campaign, which aimed to inspire target markets to think differently of Wales and to encourage people to consider Wales as an adventure destination – 'Younger 16-34's, no children' showed highest levels of awareness of the campaign. Almost one in three UK staying visitors in 2016 were motivated to visit to take part in outdoor or sporting activities and just over one in ten said this was their main reason for coming to Wales. Moreover, the proportion of staying visitors in 2016 who took part in adventure sports and activities such as mountain biking during their visit has risen sharply from 2013.
- While Wales scores very highly overall among UK staying visitors as a place to visit, the study does highlight some areas where the experience could be enhanced, and differences in opinion across different areas of the country. The cleanliness and availability of public toilets, the quality and availability of public transport and Wales' accessibility for people with a disability are all scored lower than 8 in 10, suggesting there is room for improvement on all these dimensions. What's more, those who were less than enthusiastic about their visit to Wales (the 4% who gave a score of less than 8 out of 10 for Wales overall as a place to visit) would like to see (among other things) more welcoming / friendly people and more vibrant town centres with better shopping on offer.
- Wales performs well on sense of place, with the great majority of UK staying visitors considering that some aspect of their visit included features that were distinctively Welsh or that they could not have found elsewhere (in particular Wales' heritage sites and visitor attractions). Yet while most visitors agree they want an experience from their trip to Wales which is distinct to Wales and that they couldn't get anywhere else, opinions are divided on how important it is to see or hear the Welsh language during their visit; this was more important to overseas visitors than UK visitors.

- The 2016 survey indicates a rise in the proportion of staying visitors eating out during their visit to Wales, possibly linked to the higher proportion of ABC1s visiting and to a buoyant hospitality sector. There are also improvements in visitors' perceptions of Wales' food and drink offer, on the whole. One area where demand is not being met, however, is the provision of local or Welsh food on pub and restaurant menus (especially in Cardiff, capital of Wales region) – this is an area of dissatisfaction for almost one in ten staying visitors who ate out while on holiday in Wales and is also mentioned spontaneously by some visitors as an area for improvement. Featuring more local produce on menus would be welcomed by staying visitors and would enhance the visitor experience to Wales.
- The great majority of UK staying visitors gather information in advance of their trip to Wales, with much of this information gathering being carried out online. Visitors' use of online information channels in planning their trip to Wales has risen sharply over the past three years, underlining the growing importance of clear, accessible online information to help with holiday planning and to provide inspiration to visitors on what to do and see when in Wales.
- Information sources are less important during the trip, however - almost four in ten UK staying visitors do not use any information while on holiday in Wales. Among those who do, while the balance has swung online pre-trip, a sizeable proportion of visitors are still using offline information when on holiday. In particular, leaflets still appear to have a role to play during the trip, being used as a source of information by around one in five staying visitors while on holiday in Wales in 2016. Use of brochures and Tourist Information Centres is also limited pre-trip, however TIC use is higher when in Wales.
- Another clear trend is the growing use of third party booking sites, which has increased sharply since 2013 (at the expense of visitors booking directly with the accommodation provider). This underlines how important it is for accommodation operators in Wales to have a strong presence on such sites going forward.

2. Background and objectives

2.1 The situation

Visit Wales, the Tourism arm of the Welsh Government, is one of the co-sponsors of a number of Britain-wide studies designed to determine the volume and value of tourism. The Great Britain Tourism Survey, (GBTS), Great Britain Day Visits Survey (GBDVS) and International Passenger Surveys (IPS) are conducted annually with data presented monthly or quarterly.

While these studies generate the official statistics on the volume and value of tourism and also provide useful data on visitor characteristics, they do not measure visitor satisfaction, which is a key element in encouraging repeat visits. Visitors whose trip exceeds expectations are very likely to return in future. Satisfied visitors can also become powerful advocates, as word of mouth, personal recommendation and online customer reviews feature consistently in Visit Wales research as highly significant in respect of the holiday decision-making process.

It is also clear that visitor information provision pre-trip and during trip is changing in light of the wealth of digital sources available. It is therefore of crucial importance to gain a better understanding of the use of information by visitors and how it impacts on the enjoyment of their trip.

2.2 The need for research

Visit Wales therefore commissioned a large scale visitor survey in 2016 to update findings from the 2013 wave of research and track any changes in the profile, attitudes and satisfaction of visitors. Three categories of visitor were covered: **UK day visitors, UK staying visitors and overseas visitors**. The results from the research will be used to provide benchmarks for Visit Wales' development and marketing strategies.

2.3 Aims and objectives

The overall aim of the 2016 visitor survey was as follows:

To find out relevant information about visitors to Wales, their experience of and attitudes towards Wales, and the activities undertaken and facilities used on their visit to Wales, as well as the sources of information used in planning their visit.

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.

This report focuses on the findings for UK staying visitors – separate reports are available for UK day and overseas visitors.

3. Methodology

3.1 Overview of approach

The research took a two-stage approach:

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

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). The Stage 1 questionnaire can be found at Appendix II.

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. The Stage 2 questionnaire can be found at Appendix III.

The methodology employed for the 2016 Wales Visitor Survey was different to that used in previous waves of the research. Previously, the face-to-face stage of the survey incorporated the majority of questions on demographics, activities undertaken and the visitor experience (conducted with c. 3,000 visitors). The follow-up telephone interview, post-visit, was shorter and covered visitor satisfaction, intentions to revisit and recommendation (conducted with c. 750 visitors).

In 2016 the survey was redesigned so it took the form of:

- a) A short Stage 1 interview focused on gathering profiling data with a much larger sample (**6,652 visitors**); this also generated a sample frame of telephone numbers for Stage 2
- b) A longer Stage 2 interview collecting more detailed information on activities, experience, satisfaction and perceptions of Wales, post-visit, from around half those interviewed at the first stage (**3,464 visitors**).

The 2016 survey, therefore, provides a much larger and more robust sample size than in previous years, while maintaining comparability (as far as possible) with the questions asked on key measures in past surveys.

3.2 Stage 1: Face-to-face survey

A total of 6,652 interviews was conducted with visitors aged 16 and over at 72 tourism locations across Wales. A full breakdown of all locations included in the research can be found in Appendix I.

The number of interviews achieved with each of the 3 target audiences was as follows:

- UK day visitors: 2,959 interviews
- UK staying visitors: 2,892 interviews
- Overseas visitors: 801 interviews.

In order to be eligible for interview, visitors needed to meet one of the following criteria:

- Visiting as part of a holiday, **staying** in Wales away from home
- Visiting as part of a holiday to visit friends or relatives, **staying** away from home
- On a **non-routine day visit** in / to Wales.

Anyone visiting for a routine day visit (e.g. shopping), on business or for study was excluded from the survey sample. In addition, visitors also needed to be willing to take part in the Stage 2 follow-up telephone survey, and to provide a valid telephone number on which to be contacted, in order to take part.

Quotas were set by region in Wales¹ and visitor type. Region quotas were proportionate and ensured the profile of the sample was representative of all visitors to Wales in terms of geographic penetration. Quotas on visitor type were disproportionate to ensure an adequate representation of visitors from each of the three audiences within the survey sample. At analysis, the data was weighted by region to fine-tune any imbalances between the sample and the regional profile of visitors.

The vast majority of fieldwork for Stage 1 took place between 11 June and 30 September 2016 (with one interviewing shift conducted on 15 October). All visitors were offered the choice of conducting the interview in Welsh; 641 Welsh language interviews were conducted.

¹ North Wales: Isle of Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd, Wrexham

Mid Wales: Ceredigion, Powys

South West Wales: Carmarthenshire, Neath Port Talbot, Pembrokeshire, Swansea

South East Wales: Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen, Vale of Glamorgan

3.3 Stage 2: Telephone interviews

A total of 3,464 interviews were conducted by telephone at Stage 2 with visitors who had taken part in Stage 1 (52% conversion overall). The number of interviews achieved with each of the 3 audiences was as follows:

- UK day visitors: 1,504 interviews (51% conversion)
- UK staying visitors: 1,641 interviews (57% conversion)
- Overseas visitors: 319 interviews (40% conversion).

Interviews were conducted using CATI (Computer Assisted Telephone Interviewing) technology. Quotas were set on type of visitor, to ensure a robust sample of interviews was conducted with each of the three target audiences. At the analysis stage, the data was weighted by region to fine-tune any imbalances and ensure the survey sample was representative in terms of regional visitor penetration.

For overseas visitors, interviewing shifts were scheduled for early mornings and late nights (in addition to standard day / evening shifts) to take time differences into account.

The fieldwork for Stage 2 took place between 7 July and 3 November 2016. Interviewing was staggered so that at least 2 weeks had passed between the Stage 1 and Stage 2 interviews, to allow sufficient time for UK staying / overseas visitors to return home after their trip to Wales.

Welsh-speaking visitors (established at Stage 1) were offered the choice of conducting the interview in Welsh; 55 Welsh language interviews were conducted.

3.4 Partner buy-in option

Local Authorities, Tourism Partnerships and Tourism Organisations across Wales were offered the opportunity to opt in to the 2016 Visitor Survey, commissioning either:

- Interviews at additional sampling points (not included in the core Visit Wales points) at Stage 1
- Additional interviews at core Visit Wales sampling points at Stage 1
- Additional questions for new / core sampling points at Stage 2.

A total of 12 partners opted in to the research, adding an additional 17 interviewing locations to the 55 core Visit Wales locations. Details of partner buy-in interviewing locations can be found in Appendix I.

4. Research findings

4.1 Visitor profile

Table 2 below outlines key demographic information collected in 2016 and 2013.

The vast majority of UK staying visitors live in England (84%), with only 14% living in Wales and 3% in Scotland / Northern Ireland; these proportions remain relatively unchanged since 2013.

While the proportion of younger visitors aged 16-34 has increased in 2016 (18% cf. 12% in 2013), the representation of younger people visiting Wales continues to be lower than the proportion of younger adults in the UK as a whole (31%²). In contrast, the representation of the 35-54 age group remains higher than the population average (41% cf. 34% UK). Looking at home region, there is a significantly higher proportion of younger visitors (20%) and lower a representation of older people aged 55+ coming from England (39%) compared to Wales (13% 16-34; 47% 55+).

In addition, there continues to be a strong skew towards ABC1's³ in the visitor profile, even more so amongst visitors from England. Moreover, the proportion of more affluent visitors is increasing (72% in 2016 cf. 67% in 2013). ABC1's make up 53% of the UK population.

Table 2: Demographic information of UK staying visitors	Annual Trends		Home Region 2016	
	2016 %	2013 %	Wales %	England %
Visitor origin				
Wales	14	16	100	-
England	84	84	-	100
Scotland / NI	3		-	-
Gender				
Male	46		45	47
Female	54		55	53
Age				
16 - 34 years	18	12	13	20
35 – 54 years	41	41	40	42
55+ years	40	46	47	39

² Source: ONS Census 2011

³ 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

Table 2: Demographic information of UK staying visitors (continued)	Annual Trends		Home Region 2016	
	2016 %	2013 %	Wales %	England %
Socio-economic grade				
ABC1	72	67	68	73
C2DE	27	31	33	27
Refused	<1	2	-	<1
Welsh speaker				
Fluent	4		28	1
Non-fluent	2		10	1
Non-Welsh speaker	93		63	98
Ethnicity				
White	96	97	99	95
Non-white / other	4	3	<1	4
Refused	<1	-	<1	<1

Bases = all UK staying visitors: Stage 1 2016 (2,892); Stage 2 2016 (1,641); 2013 (1,618); Wales 2016 (383); England 2016 (2,441).

NB percentages may not add to up to 100% due to rounding. Shaded boxes denote that 2013 comparison data was not available.

Table 3 overleaf shows the key demographics of visitors by the thirteen marketing regions within Wales.

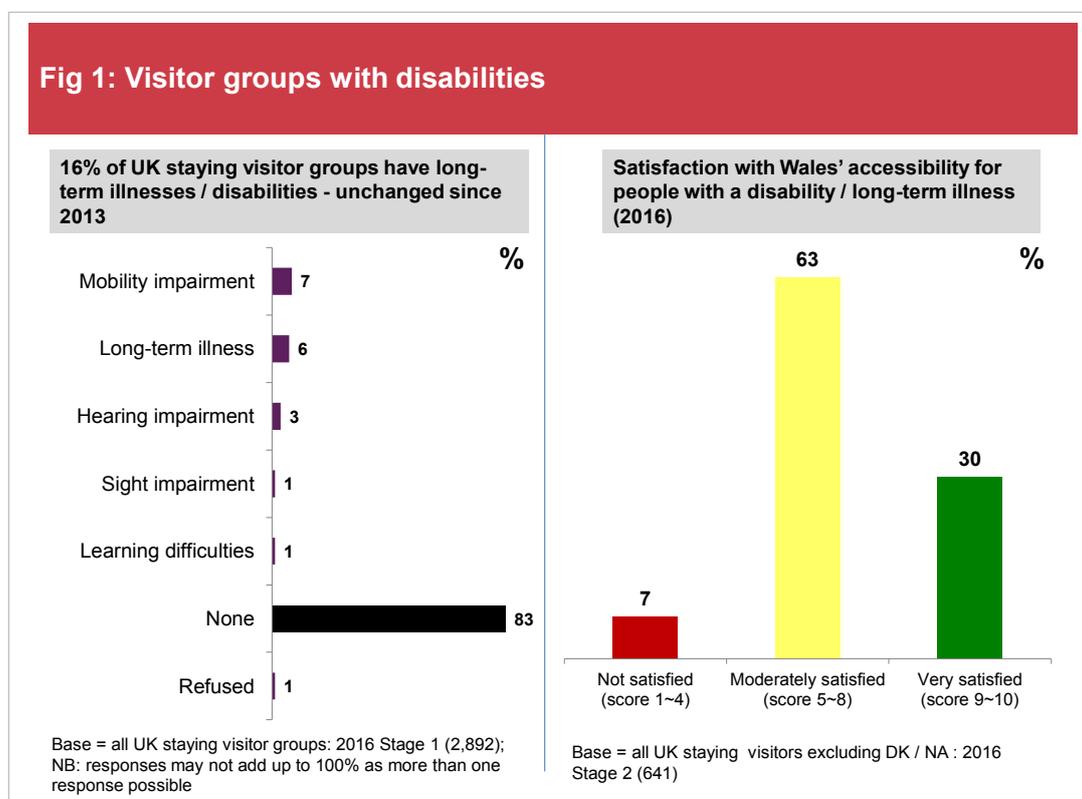
It should be noted that while fluent Welsh speakers appear to be much more prevalent in the Wye Valley / Vale of Usk compared to all other areas in Wales, this will be heavily influenced by the fact that interviewing took place in Abergavenny during the National Eisteddfod week.

Table 3: Demographic information by marketing region (Bases in brackets)	ALL WALES (1,641)	Cardiff, capital of Wales (199)	Carmar- thenshire (175)	Ceredigion / Cardigan Bay (208)	Glamorgan Heritage Coast (84)	Isle of Anglesey (182)	Llandudno & Colwyn Bay (165)	Mid Wales & Brecon Beacons (305)	North East Wales (172)	Pembr- okeshire (191)	Snowdonia Mountains and Coast (383)	South Wales Valleys (208)	Swan- sea Bay (328)	Wye Valley and Vale of Usk (292)
Visitor origin														
Wales	14	10	27	23	12	6	4	9	5	31	9	12	7	23
England	84	86	72	76	81	91	92	90	94	69	91	84	91	74
Scotland / NI	3	4	<1	1	7	3	5	2	2	1	1	3	2	3
Gender														
Male	46	42	41	57	29	47	37	52	37	47	51	51	46	48
Female	54	58	59	43	71	53	63	48	63	53	49	49	54	52
Age														
16 - 34 years	18	22	10	9	27	26	18	18	13	17	19	29	21	9
35 – 54 years	41	45	33	38	38	50	39	44	33	41	55	36	42	35
55+ years	40	34	57	54	34	23	44	39	54	42	26	32	37	54
Socio-economic grade														
ABC1	72	74	81	62	62	71	55	78	63	69	76	71	75	79
C2DE	27	26	18	39	36	29	45	22	38	31	23	30	26	20
Refused	<1	1	1	-	1	-	-	-	-	-	-	-	-	1
Welsh speaker														
Fluent	4	5	6	3	1	1	1	1	1	3	1	<1	1	18
Non-fluent	2	3	5	3	4	1	2	3	1	6	3	1	-	2
Non-Welsh speaker	93	93	89	93	95	97	96	96	99	91	96	98	99	80
Ethnicity														
White	96	89	96	98	98	95	97	95	98	97	96	96	95	98
Non-white / other	4	12	2	1	2	4	3	5	2	3	4	2	5	1
Refused	<1	-	1	<1	-	1	1	-	-	-	-	<1	1	1

As was the case in 2013, a relatively small proportion of UK staying visitor groups (including respondents and anyone else in their group) coming to Wales have a long-term illness or disability (16%), with the most common being a mobility impairment (7%), followed by 6% with a long-term illness. The incidence of visitor groups with a disability is in line with UK statistics (17% across the UK⁴).

At Stage 2, all UK staying visitors were asked to comment on Wales' accessibility for people with a disability, using a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied. After taking out those unable to give an opinion, nearly two thirds gave Wales a score of 5 to 8 out of 10 (63%). Only a small proportion of UK staying visitors (7%) gave negative scores of 1 to 4, while 30% gave high scores (9 to 10).

Satisfaction levels were higher amongst those visitors with a limiting illness / disability than amongst those without (with 34% of the former scoring 9 to 10 compared with 28% of the latter). Satisfaction was highest amongst those with mobility impairments, where 38% scored Wales 9 to 10 on accessibility – see Figure 1 below.

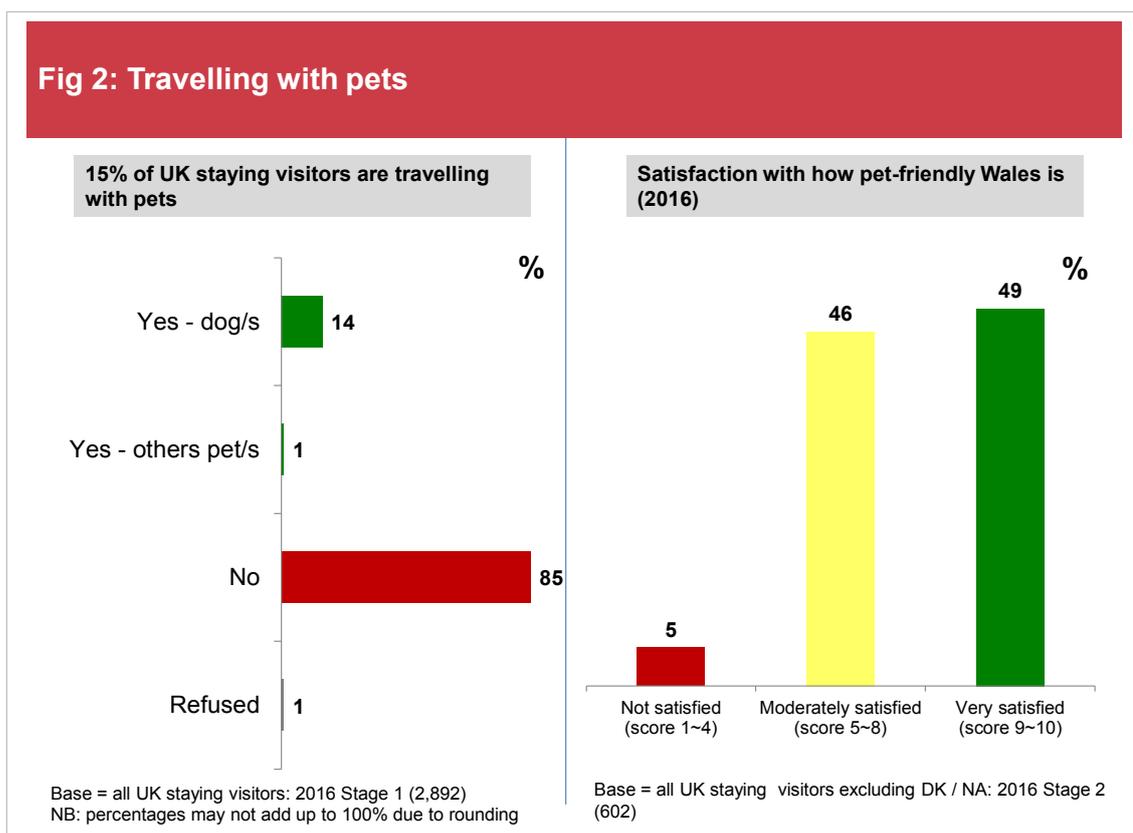


⁴ Source: ONS Census 2011

A new question added in 2016 looked at the incidence of UK staying visitors bringing pets on their trip to Wales; 15% travelled with pets, with nearly all bringing dog/s (14%).

At Stage 2, all UK staying visitors were asked to comment on how pet-friendly Wales is, using the same scale of 1 to 10 as seen previously. Where visitors were able to comment Wales was scored highly on this dimension, with around half giving a score of 9 to 10 (49%) and only 5% giving a negative score (1 to 4).

Satisfaction levels were higher amongst those travelling with pet/s than those without (at 54% of the former compared with 47% of the latter scoring 9 to 10) – see Figure 2 below.



Wales continues to attract couples and families; as was seen in 2013, most visitors come to Wales as a couple (38%), while three in ten (30%) visit with children (most of these bring young children). A further 7% visit as a family group without children while 12% come with friends. Each visitor group contains an average of 3.5 people (2.8 adults and 0.8 children). Group sizes for visitor groups from Wales were slightly larger than those from England (3.7 cf. 3.5), containing slightly more children.

Couples were in greatest evidence in Ceredigion / Cardigan Bay (63% cf. 38% overall), while the Isle of Anglesey and Glamorgan Heritage Coast saw the highest proportions of families with young children (42% and 40% respectively cf. 26% overall).

Levels of repeat visiting are high, with 69% of UK staying visitors having visited Wales (or the area where they were interviewed, in the case of Welsh visitors) more than once in the last three years. Around a third of these have visited 2 to 3 times, while almost a fifth are very regular visitors, having taken 7 or more trips to Wales in the last three years. Only a third of UK staying visitors have only visited once (31%); the average number of visits in the last three years is 4.5 (down from 5.2 in 2013). As might be expected, visitors from Wales were much more likely to be repeat visitors (92% cf. 66% from England) and had made more visits in the last three years (7.4 cf. 4.1).

Visitors to Mid Wales and Brecon Beacons were most likely to return on a regular basis, with 22% having made 10 or more trips to Wales in the last 3 years (average 5.7 trips cf. 4.5 overall). In contrast, visitors to Cardiff, capital of Wales were least frequent visitors, with 5% making 10 or more trips (average 3.0 trips in the last 3 years) – see Table 4 overleaf.

Table 4: Group type and frequency of visiting	Annual Trends		Home Region 2016	
	2016 %	2013 %	Wales %	England %
Type of visiting party				
Couple	38	42	37	38
Family with young children	26	26	28	26
Friends	12	7	12	11
Family without children	7	5	5	8
Family with older children	4	8	9	7
Visiting alone	4	5	4	4
Family with older and younger children	4	4	3	4
Organised group / society	1	3	1	1
Other	<1	1	<1	<1
Refused	1	-	<1	1
Average number of adults	2.8		2.8	2.8
Average number of children	0.8		0.9	0.7
Average total number of people	3.5		3.7	3.5
Frequency of visiting in last three years				
Once	31	30	8	34
2 – 3 times	31	30	26	31
4 – 6 times	18	14	26	17
7 – 10 times	7	6	9	6
More than 10 times	13	19	30	10
Don't know	<1	2	<1	1
AVERAGE	4.5	5.2	7.4	4.1

Bases = all UK staying visitors: Stage 1 2016 (2,892); Stage 2 2016 (1,641); 2013 (1,618); Wales 2016 (208); England 2016 (1,402). NB percentages may not add to up to 100% due to rounding. Shaded boxes denote that 2013 comparison data was not available.

Segmentation

UK staying visitors were further classified as belonging to five key groups, or segments, with the following characteristics:

- Younger visitors (aged 16-34 years), no children in their visitor group;
- Post family group (aged 35-54 years), no children in their visitor group;
- Post family group (aged 55+ years), no children in their visitor group;
- Visitors of any age, with children in their visitor group, ABC1 social grade;
- Visitors of any age, with children in their visitor group, C2DE social grade.

Figure 3 below shows that the largest proportion of UK staying visitors fall into the 'Post-family 55+' group (35%), followed by 'ABC1s travelling with children' (27%).

One in six visitors are 'Post-family 35-54' (16%), while just over one in ten are 'Younger 16-34, no children'. The group with the lowest representation amongst UK staying visitors is the 'C2DEs travelling with children' group (10%).

Groups from Wales are more likely to be 'Post-family 55+' (37%) or 'C2DE travelling with children' (12%) compared to those from England (34% and 10% respectively). Conversely, groups from England are more likely to be 'Post-family 35-54' (17%) and 'Younger 16-34, no children' (13%) than those from Wales (15% and 8% respectively) – see Figure 3 below.

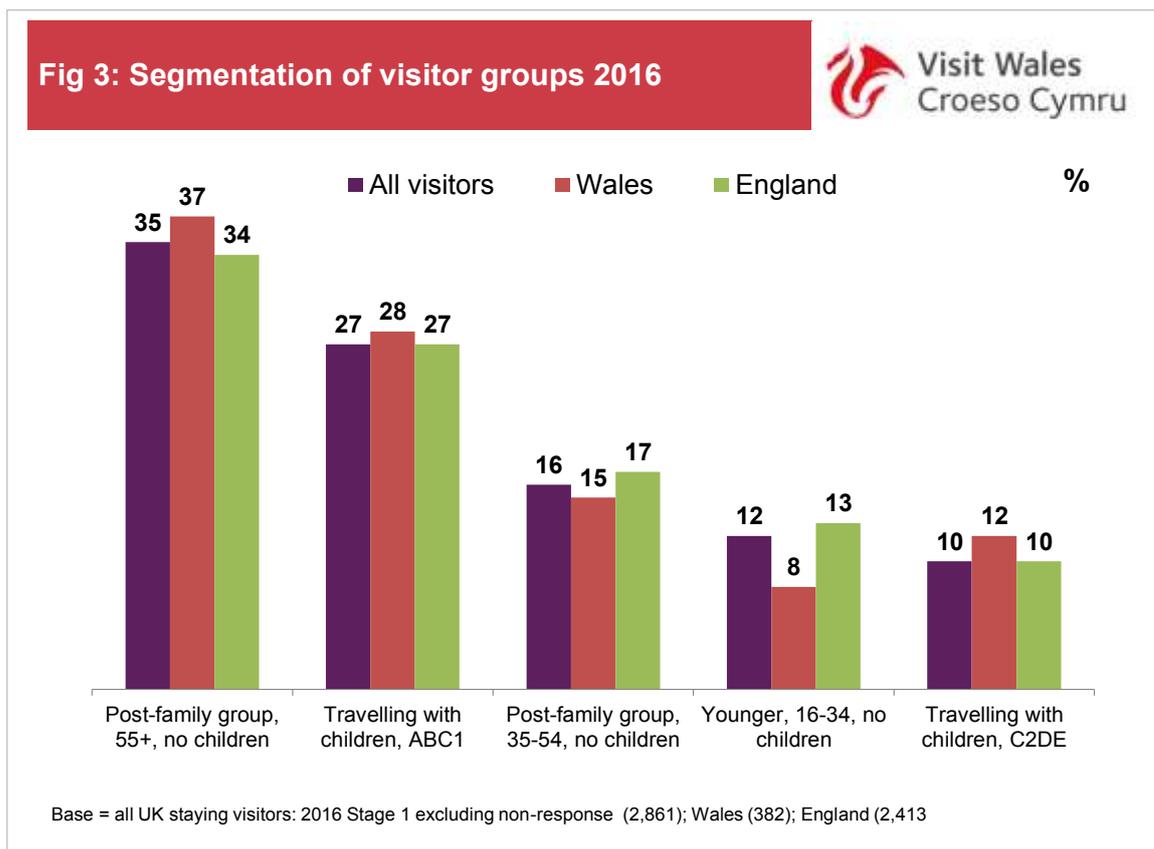


Table 5 overleaf shows the segmentation of visitors by the thirteen marketing regions within Wales, and illustrates that areas of Mid Wales, North Wales and along the southern border are visited by higher than average proportions of 'Post-family 55+'. The Isle of Anglesey receives more groups with children (both ABC1 and C2DE) while 'Younger 16-34, no children' show a high penetration level in the South Wales Valleys – this may be influenced by the inclusion of Bike Park Wales in the survey locations in 2016.

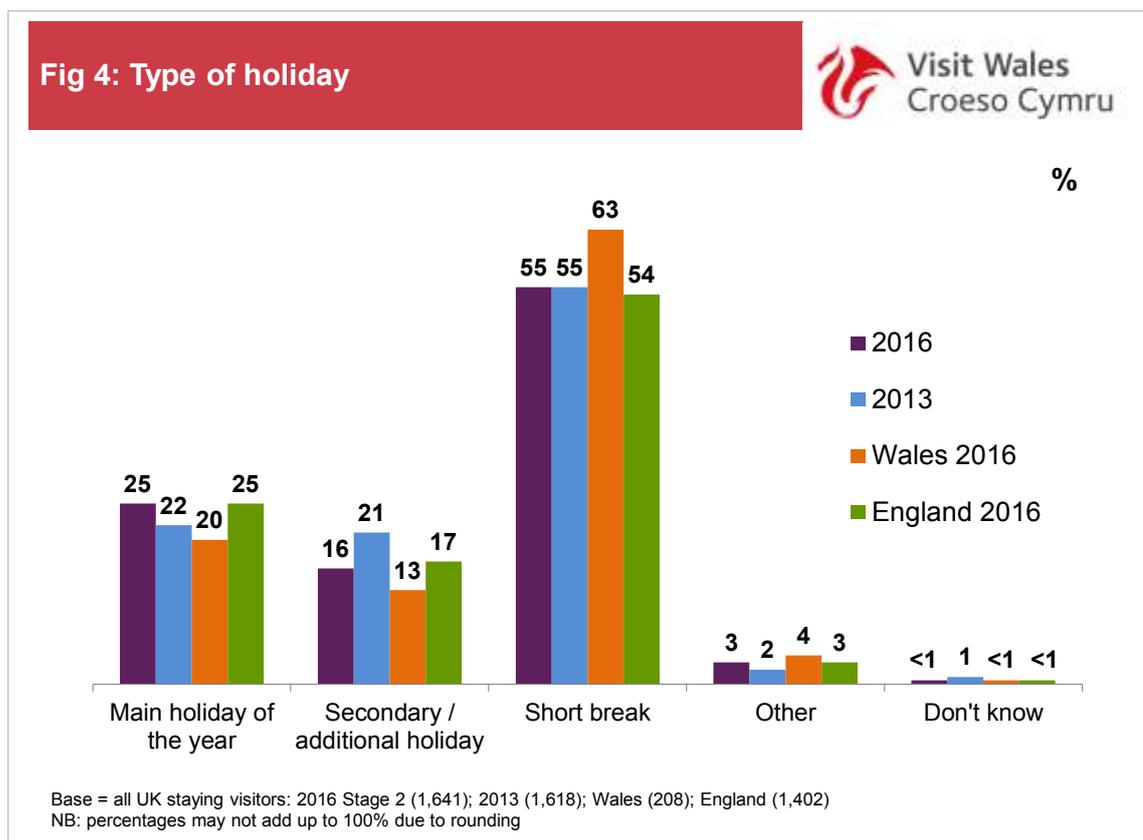
Table 5: Segmentation by marketing region (Bases in brackets)	ALL WALES	Cardiff, capital of Wales	Carmar- thenshire	Ceredigion / Cardigan Bay	Glamorgan Heritage Coast	Isle of Anglesey	Llandudno & Colwyn Bay	Mid Wales & Brecon Beacons	North East Wales	Pembr- okeshire	Snowdonia Mountains and Coast	South Wales Valleys	Swans- ea Bay	Wye Valley and Vale of Usk
	(1,641)	(199)	(172)	(208)	(82)	(178)	(164)	(304)	(172)	(191)	(371)	(206)	(323)	(291)
Post-family group, 55+, no children	35	30	51	51	27	17	34	33	45	38	20	27	32	49
Travelling with children, ABC1	27	26	30	14	29	45	24	32	17	27	37	28	23	22
Post-family group, 35-54, no children	16	19	9	23	12	11	13	15	17	14	21	12	19	18
Younger, 16-34, no children	12	19	4	5	12	12	9	11	8	12	12	23	15	7
Travelling with children, C2DE	10	7	5	8	20	16	20	10	13	9	11	11	11	4

4.2 Trip profile

4.2.1 Type of holiday

Wales is primarily a short-break destination rather than a main holiday destination; as was the case in 2013, just over half UK staying visitors came to Wales for a short break (55%), while around two fifths (41%) of UK staying visitors came for a longer holiday; 25% overall said their trip to Wales was their main holiday of the year.

As might be expected, staying visitors from England are more likely to be on a main or secondary holiday (42%) compared to those from Wales (33%), while visitors from Wales are more likely to be on a short break (63% cf. 54% England) – see Figure 3 below.



Visitors to Snowdonia Mountains and Coast and Pembrokeshire were most likely to be on their main holiday (41% and 39% respectively), while visitors to the Glamorgan Heritage Coast and Cardiff, capital of Wales were most likely to be on a short break (73% and 69% respectively).

In addition, visitors travelling with children tended to be taking their main holiday in Wales:

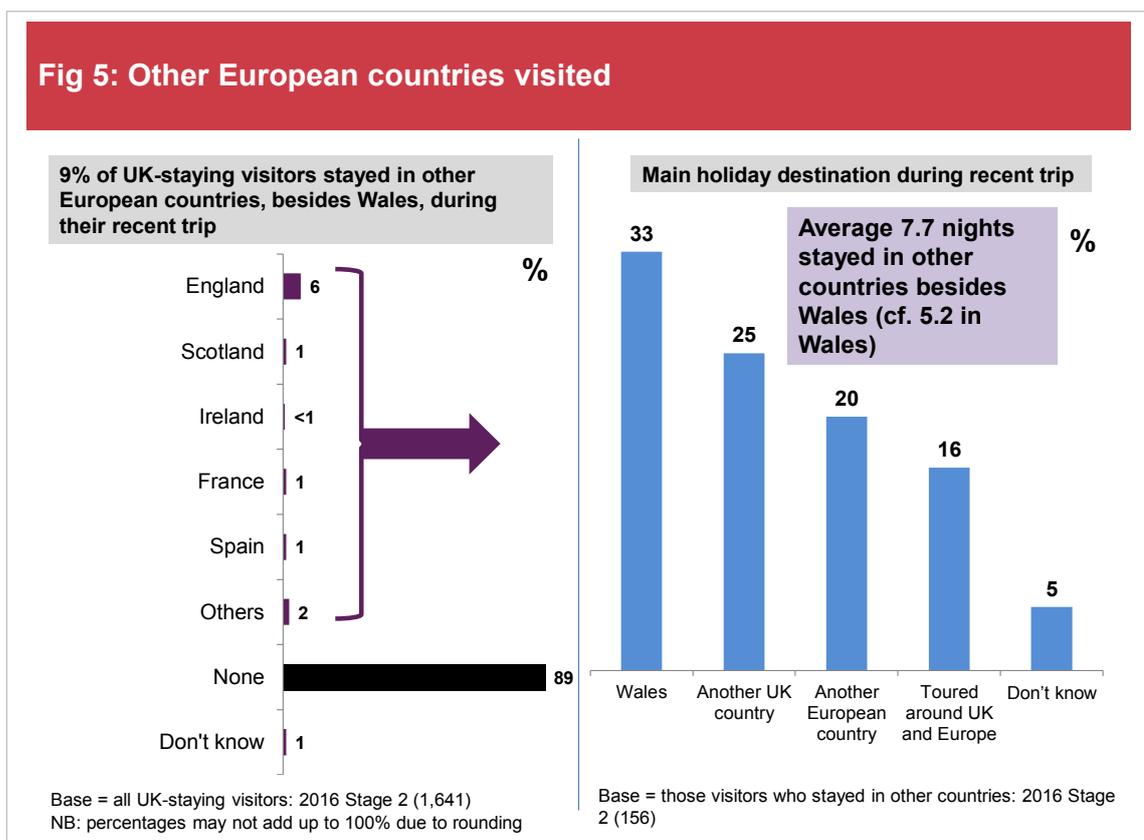
- Travelling with children, ABC1 = 37%
- Travelling with children, C2DE = 34%

Those visitors coming to Wales on a short break tended to be 'Younger, 16-34, no children (69%)' and 'Post-family group, 35-54, no children' (67%).

4.2.2 Visiting other places

Around one in ten UK staying visitors had stayed in another country besides Wales, on their recent trip (9%). England was most likely to have been visited alongside Wales (6%), with Scotland mentioned by 1% and Ireland by less than 1%.

Amongst those who had stayed in other countries on their trip, Wales was more likely to have been the main holiday destination than any other country (with a third saying this), although 16% had been touring around the UK and Europe with no main destination – see Figure 5 below.

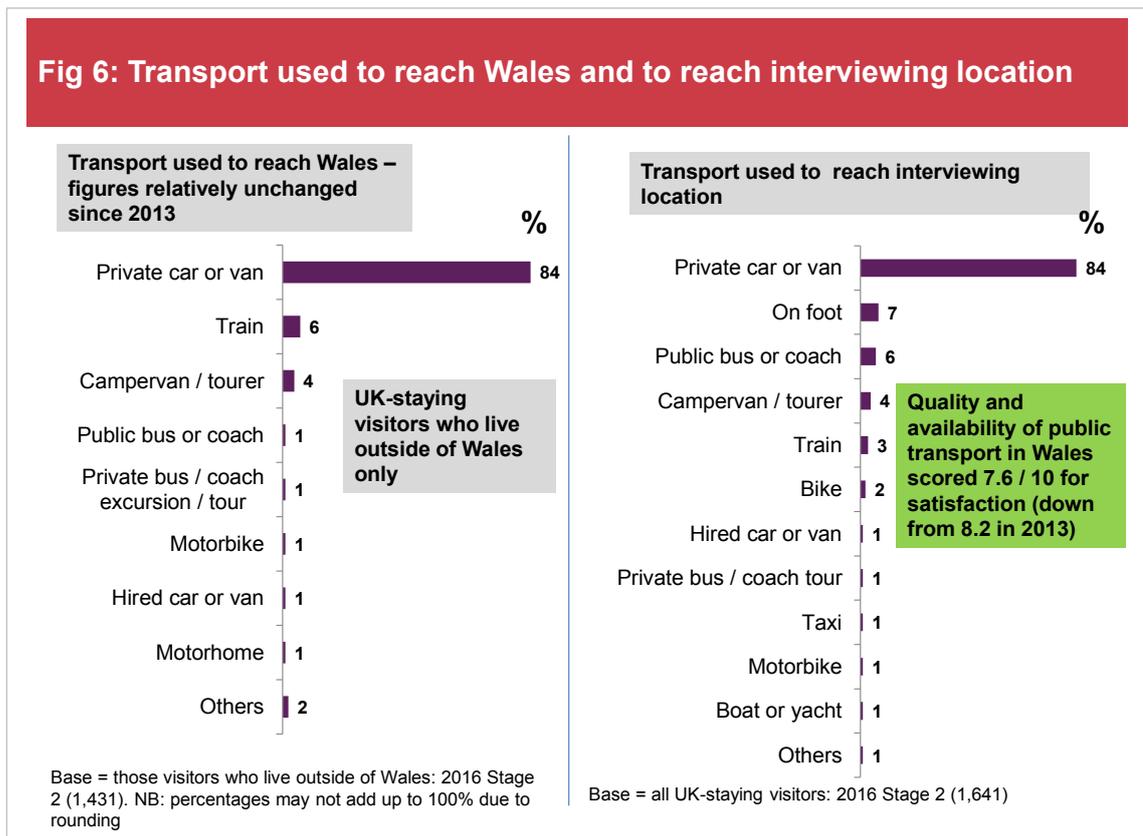


4.2.3 Transport

The vast majority of UK staying visitors (who lived outside of Wales) travelled to Wales by car (84%). Only 7% used public transport (6% train; 1% public bus or coach); these findings are consistent with 2013 data.

Similarly, 84% travelled to the location where they were interviewed by car. Just under 1 in 10 used public transport (6% bus or coach, 3% train), while 7% were able to walk there.

The quality of public transport was also rated by visitors interviewed, with an average score of 7.6/10 given for the quality and availability of public transport in Wales. However, this score is lower than was seen for other aspects of the trip (outlined in section 4.4) – see Figure 6 below.



4.3 Motivations for visiting and activities undertaken

4.3.1 Reasons for visiting Wales

The countryside and beaches of Wales continue to be a draw for UK staying visitors, with around two thirds coming to Wales to enjoy the landscape (67%); for 32% of visitors, this was their main reason for visiting (although down from 42% in 2013).

“The reason we go is the beautiful coastline, nice countryside”

Just over half (54%) came to Wales to visit places, historical and religious sites and attractions (with 17% saying this was their main motivation), while almost a third (32%) came to take part in outdoor or sporting activities.

“Wales is such a lovely beautiful place - we really enjoy visiting, especially all of the historical sites and events.”

“Love it! There are lots of things to do, especially outdoors.”

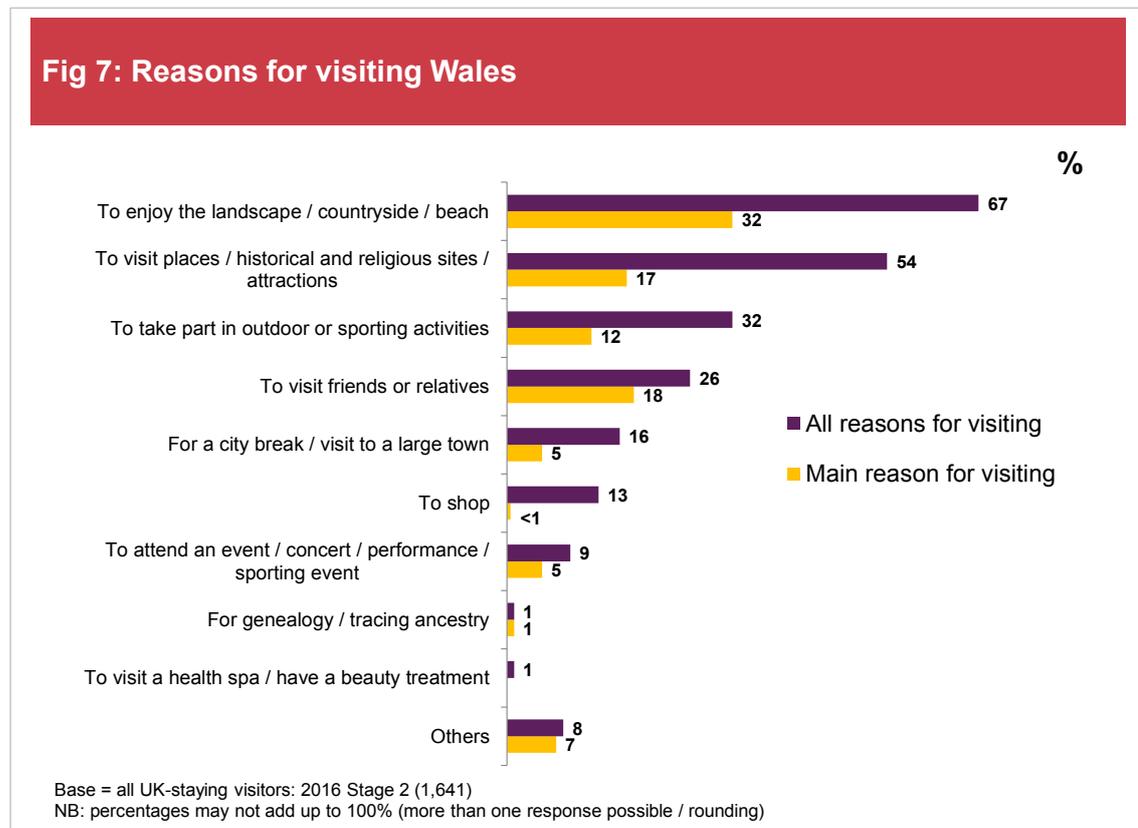


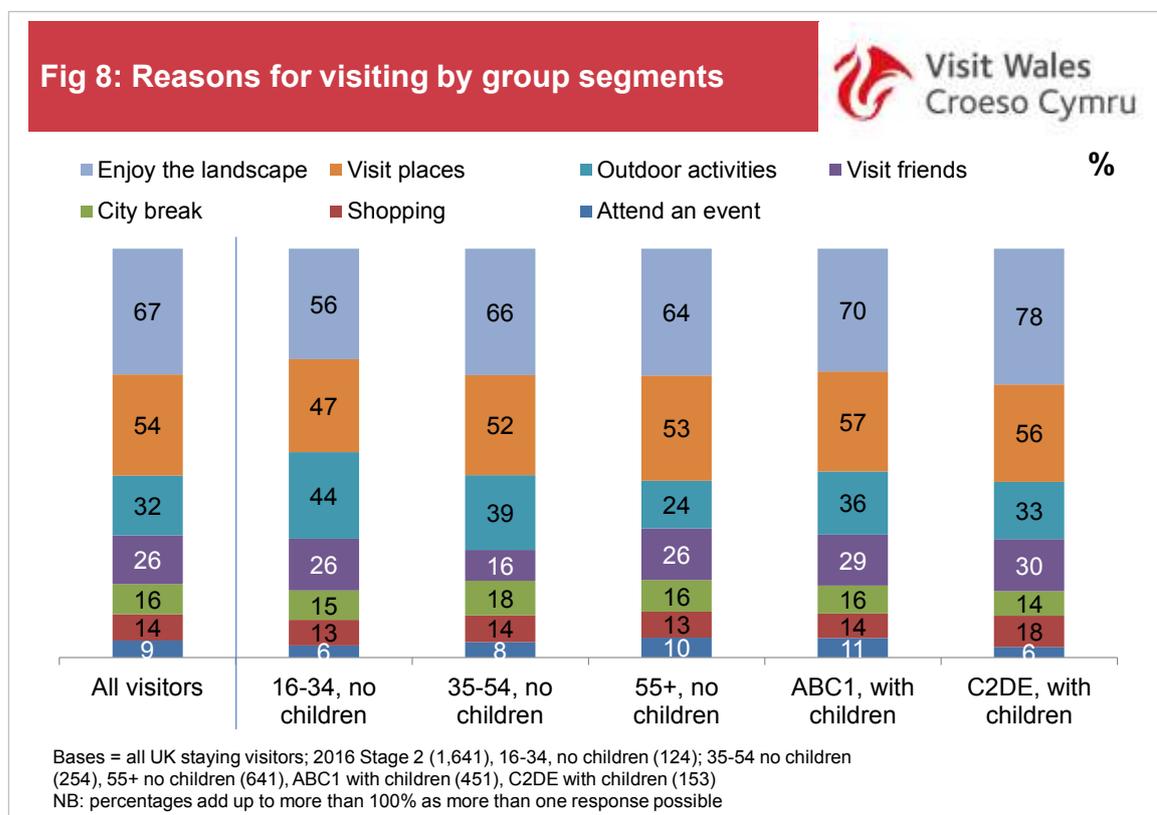
Table 6 overleaf shows the reasons for visiting by the thirteen marketing regions within Wales, and clearly illustrates the differing motivating factors influencing visits to different regions of Wales. It should be noted, however, that these factors will be influenced not only by the differing tourism offerings in each area, but also by the nature of the interviewing locations included in the survey for each area.

For example, a higher than average number of visitors went to the Snowdonia Mountains and Coast region to enjoy the countryside; not only is this area known for its natural beauty, but many of the interviewing locations were at scenic destinations (e.g. Llanberis, Bala, Beddgelert, Dolgellau) or within Snowdonia National Park itself. Also, in the Wye Valley / Vale of Usk, the higher than average proportion of visitors coming to attend an event will be heavily influenced by interviews taking place in Abergavenny during Eisteddfod week.

Please note that caution should be taken when interpreting these results, which are intended to provide indicative rather than absolute figures due to small base sizes.

Table 6: Reasons for visiting by marketing region (Bases in brackets)	ALL WALES (1,641)	Cardiff, capital of Wales (118)	Carmarthenshire (104)	Ceredigion / Cardigan Bay (117)	Glamorgan Heritage Coast (45)	Isle of Anglesey (101)	Llandudno & Colwyn Bay (90)	Mid Wales & Brecon Beacons (170)	North East Wales (110)	Pembrokeshire (110)	Snowdonia Mountains and Coast (236)	South Wales Valleys (110)	Swansea Bay (168)	Wye Valley and Vale of Usk (162)
Enjoy the countryside	67	47	68	78	60	74	61	70	71	70	82	48	76	68
Visit places / attractions	54	68	49	53	56	50	49	48	48	43	57	52	45	62
Outdoor activities	32	15	34	32	18	30	17	37	31	33	51	34	42	27
Visit friend and family	26	31	20	10	58	25	11	26	28	16	15	37	30	28
City break	16	47	10	10	29	9	11	10	10	11	11	14	12	14
Shopping	13	25	11	14	20	15	16	12	14	9	13	9	7	17
Attend an event / concert	9	7	7	3	9	9	3	3	9	12	8	8	5	22
Genealogy	1	-	7	1	2	1	-	3	2	1	<1	-	1	2
Visit a spa	1	1	1	1	-	2	-	-	2	-	-	1	1	-

Looking at the reasons for visiting by group segment, certain differences in motivations for visiting emerge. For example, 'C2DE with children' are most likely to have visited Wales to enjoy the countryside (78%), while 'Younger 16-34, no children' are most likely to have visited to take part in outdoor activities (44%). This group is also least likely to have come to Wales to visit specific places and attractions (47%) – see Figure 8 below for more details.



Further examination of the reasons for visiting by new, lapsed and repeat visitors reveals that repeat visitors tended to be visiting friends and relatives (30%), more so than new (16%) and lapsed visitors (19%). Moreover, lapsed and repeat visitors were more likely to have come to take part in outdoor activities (33% for each) compared to new visitors (22%), while new and lapsed visitors were more likely to have come for a city break (20% and 21% respectively) compared to repeat visitors (14%) – see Table 7 below.

Table 7: Reasons for visiting by recency of visiting Wales	2016 %	New %	Lapsed %	Repeat %
Enjoy the countryside	67	64	68	67
Visit places / attractions	54	59	60	51
Outdoor activities	32	22	33	33
Visit friend and family	26	16	19	30
City break	16	20	21	14
Shopping	14	14	11	15
Attend an event / concert	9	13	4	10
Genealogy	1	1	1	2
Visit a spa	1	1	<1	1

Bases = all UK staying visitors: Stage 2 2016 (1,641); New (146); Lapsed (389); Repeat (1,098).
 NB percentages may not add to up to 100% as more than one response possible.

4.3.2 Activities undertaken while in Wales

Amongst those visiting Wales to enjoy the landscape, the majority went to the beach during their trip, as was the case in 2013 (63% cf. 67%). Around half visited a country or forest park (46%, up from 34%) and a quarter visited a wildlife attraction (24%) or garden (23%). On the whole, more visitors took part in specific activities involving the countryside in 2016 compared to 2013 – see Table 8 below.

Table 8: Specific activities undertaken: To enjoy the landscape / countryside / beach	2016 %	2013 %
% all UK staying visitors saying this was a reason for visiting	67	69
Specific activities undertaken by those visitors coming to enjoy the landscape / countryside / beach		
Visited the beach	63	67
Visited country parks / forest parks	46	34
Visited a wildlife attraction / nature reserve	24	
Visited gardens	23	18
Wildlife watching	19	10
Visited specific attractions	4	
Guided walk	3	
Walking / rambling (not guided)	2	
Others	5	11
Don't know / can't remember	8	-

Bases = all UK staying visitors: Stage 2 2016 (1,641); 2013 (1,618). All visitors visiting to enjoy the landscape: Stage 2 2016 (1,134); 2013 (1,124). NB percentages may not add to up to 100% as more than one response possible. Shaded boxes denote that 2013 comparison data was not available (new question).

Focusing on visitors who went to the beach; two thirds of these were influenced by environmental awards such as the Blue Flag Awards or Green Coast Awards when choosing which beach to visit (with 66% saying this was important to their choice). Conversely, these awards made no difference to around a third of beach visitors (32%).

Most of the UK staying visitors who had come to Wales to visit places and attractions said they did some general sightseeing (65%, up from 47% in 2013). A similar proportion visited a castle or other historic attraction (64%), while two fifths (41%) visited a museum or heritage centre. Again, more visitors took part in specific activities involving places and attractions in 2016 compared to 2013 – see Table 9 overleaf.

Table 9: Specific activities undertaken: To visit places / historical and religious sites / attractions / city break	2016 %	2013 %
% all UK staying visitors saying this was a reason for visiting	59	58

Specific activities undertaken by those visitors coming to visit places / historical and religious sites / attractions / city break		
General sightseeing	65	47
Castle or other historic attraction	64	58
Museum or heritage centre	41	25
Nature-based attraction (e.g. gardens)	26	20
Religious site (e.g. cathedral)	24	10
Industrial heritage attraction (e.g. mill)	21	16
Scenic / steam / historic railway	17	18
Art gallery or exhibition	14	9
Animal-based attraction (e.g. zoo)	13	11
A location associated with a TV series, film or literature	9	
Theme / amusement park	5	4
Science / technology centre	4	7
Others	2	6
Don't know / can't remember	5	-

Bases = all UK staying visitors: Stage 2 2016 (1,641); 2013 (1,618). All visitors visiting to visit places: Stage 2 2016 (946); 2013 (936). NB percentages may not add to up to 100% as more than one response possible. Shaded boxes denote that 2013 comparison data was not available (new question).

Clear regional differences are evident in the types of places visited, reflecting the mix of attractions available across Wales. For example, in South East Wales, half visited a museum or heritage centre (cf. 41% overall) while in North and Mid Wales, three in ten visited a scenic or historic railway (cf. 17% overall).

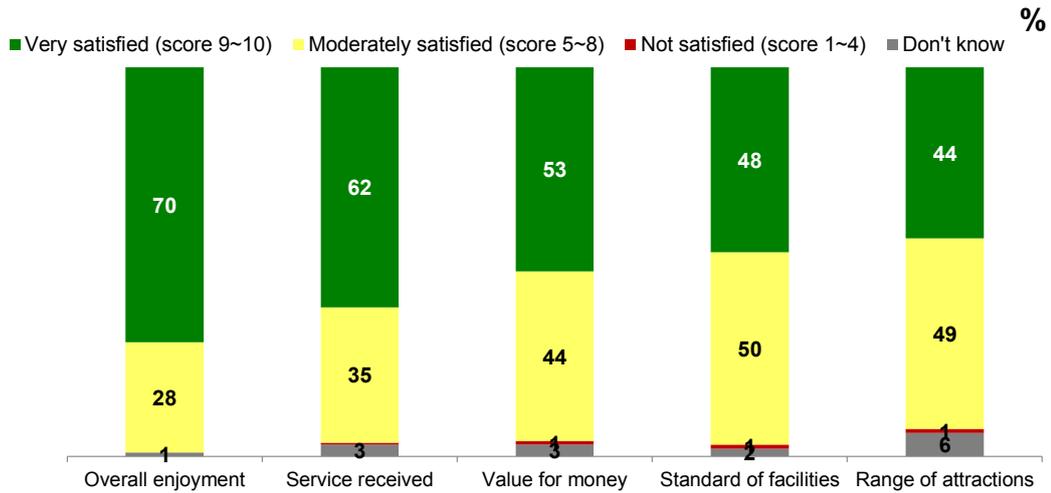
UK staying visitors who had visited an attraction during their stay were asked how satisfied they were with various aspects of attractions in Wales (using a scale of 1 to 10); seven in ten gave a high score (of 9 or 10) for their overall enjoyment.

Two thirds gave high satisfaction scores for the service received at attractions visited (62%), while around half said the same for value for money (53%) and the standard of facilities there (48%). Only 44% rated the range of attractions a 9 or 10, however.

“I just wanted to clarify how reasonable prices were when getting in to specific sites and attractions. St David’s in Pembrokeshire was great and hardly cost anything. The places we visited were great in terms of what they offered and how much they were.”

Average satisfaction ratings were slightly lower in 2016 compared to 2013 on the whole, however – see Figure 9 overleaf.

Fig 9: Satisfaction with attractions visited



Average scores:

	Overall enjoyment	Service received	Value for money	Standard of facilities	Range of attractions
2016	9.1	8.9	8.6	8.5	8.4
2013	9.2	9.2	9.0	9.0	9.1

Base = all visitors who visited an attraction: 2016 Stage 2 (813), 2013 (745)
 NB: percentages may not add up to 100% due to rounding

Table 10 below shows the average satisfaction scores for attractions visited in each of the thirteen marketing regions within Wales.

Please note that caution should be taken when interpreting these results, which are intended to provide indicative rather than absolute figures due to small base sizes.

Table 10: Average scores for attractions by marketing regions		Overall enjoyment	Service received	Value for money	Standard of facilities	Range of attractions
Bases in brackets (NB some very small)						
ALL WALES	(813)	9.1	8.9	8.6	8.5	8.4
Cardiff, capital of Wales	(87)	9.0	8.9	8.6	8.5	8.4
Carmarthenshire	(46)	9.1	9.0	9.0	8.7	8.8
Ceredigion / Cardigan Bay	(56)	9.0	8.9	8.5	8.5	8.3
Glamorgan Heritage Coast	(20)	9.0	8.8	8.6	8.5	8.6
Isle of Anglesey	(47)	9.1	8.6	8.4	8.3	8.3
Llandudno and Colwyn Bay	(39)	9.2	8.7	8.3	8.4	8.4
Mid Wales and Brecon Beacons	(75)	9.2	9.0	8.8	8.7	8.5
North East Wales	(54)	9.0	8.7	8.7	8.6	8.3
Pembrokeshire	(47)	9.1	8.6	8.6	8.5	8.5
Snowdonia Mountains and Coast	(122)	9.2	9.0	8.3	8.5	8.3
South Wales Valleys	(54)	9.1	8.9	8.6	8.5	8.4
Swansea Bay	(71)	9.0	9.0	8.8	8.6	8.6
Wye Valley and Vale of Usk	(95)	9.1	9.0	8.7	8.5	8.3

Walking was by far the most popular activity undertaken by UK staying visitors who had come to Wales to take part in outdoor or sporting activities. Moreover, visitors took part in longer walks in 2016 than in 2013, with three quarters walking for more than 2 miles in Wales (up from 55%) and just a fifth walking for less than 2 miles (down from 43%).

The increase in the number of visitors taking part in mountain biking and adventure sports may be influenced by both the increase in younger visitors to Wales aged 16-34, and also by the inclusion of outdoor activity attractions to the interviewing locations (e.g. Bike Park Wales) – see Table 11 below.

Table 11: Specific activities undertaken: To take part in outdoor or sporting activities	2016 %	2013 %
% all UK staying visitors saying this was a reason for visiting	32	35

Specific activities undertaken by those visitors coming to take part in outdoor or sporting activities		
Walking (more than 2 miles)	75	55
Walking (less than 2 miles)	20	43
Cycling	15	12
Swimming (outdoor and indoor)	13	
Mountain biking	13	2
Adventure sports (e.g. canoeing)	12	2
Water sports	8	6
Canal / boating trip	6	4
Fishing – sea	3	5
Horse riding / pony trekking	3	1
Field sports (e.g. shooting)	2	
Golf	2	3
Others	4	8
Don't know / can't remember	2	-

Bases = all UK staying visitors: Stage 2 2016 (1,641); 2013 (1,618). All visitors visiting to take part in outdoor activities: Stage 2 2016 (550); 2013 (569). NB percentages may not add to up to 100% as more than one response possible. Shaded boxes denote that 2013 comparison data was not available (new question)

While only a small proportion of UK staying visitors visited Wales (or a particular part of Wales) to attend an event, concert or sporting event, the proportion saying they attended a cultural festival, including the National Eisteddfod, during their trip has risen (to 39%). It must be noted, however, that bespoke interviewing shifts were conducted in Abergavenny town centre in 2016 (as part of the partner buy-in) with questions focusing on the National Eisteddfod which took place in the area in early August, therefore this increase is likely to be influenced by methodological factors.

Attendance at sporting events also increased (17% cf. 8%) – see Table 12 overleaf.

Table 12: Specific activities undertaken: To attend an event / concert / performance / sporting event	2016 %	2013 %
% all UK staying visitors saying this was a reason for visiting	9	6

Specific activities undertaken by those visitors coming to attend an event / concert / performance / sporting event		
Arts / cultural festival / Eisteddfod	39	14
Sporting event	17	8
Live concert	14	19
Theatre or cinema performance	12	11
Music festival	8	8
Activity event (e.g. cycle race)	7	
Food / drinks festival	4	1
Others	2	47
Don't know / can't remember	16	-

Bases = all UK staying visitors: Stage 2 2016 (1,641); 2013 (1,618). All visitors visiting to attend an event: Stage 2 2016 (136); 2013 (96). NB percentages may not add to up to 100% as more than one response possible. Shaded boxes denote that 2013 comparison data was not available (new question).

4.4 Satisfaction with overall experience

4.4.1 Satisfaction with aspects of visit

In general, UK staying visitors are highly satisfied with their trip to Wales. On a scale of 1 to 10, visitors gave a score of 9.2/10 for *Wales overall as a place to visit* (comparable to 2013). The quality of the natural environment receives the highest average score of all specific dimensions evaluated (9.0/10).

Most other aspects of the visit also score in the 8 to 10 range, with only four dimensions scoring below this:

- Shopping (7.9)
- Quality and availability of public transport (7.6)
- Accessibility for people with a disability / long-term illness (7.6)
- Cleanliness and availability of public toilets (7.5).

Some general comments received at the end of the questionnaire that linked into the findings are as follows:

“I was pleasantly surprised at the welcome from everyone I came across. Superb!”

“It was a very good holiday and very good value for money; it's a very good destination”.

“The toilets were a bit hit and miss - some were really clean and excellent but others were really awful.”

“On the whole we enjoyed our stay, although the streets weren't as clean as we had imagined they would be.”

Very little variation in ratings was evident between new, lapsed or repeat visitors. Some differences are apparent between 2016 and 2013, however, with a small decrease on most scores in 2016. These could be the result of:

- An increase in younger visitors – in general, younger people are more demanding and display lower levels of satisfaction than older people
- The change to a telephone methodology for these questions – satisfaction scores obtained at Stage 2 in 2013 (during the post-trip telephone interviews) are more in line with the 2016 figures than the face-to-face ratings given in 2013.

Table 13 below provides details of the scores provided for each individual dimension.

Table 13: Satisfaction with various aspects of visit to Wales Average scores: 1 = Very dissatisfied; 10 = Very satisfied	Annual Trends		Visitor Type 2016		
	2016 %	2013 %	New	Lapsed	Repeat
Wales overall as a place to visit	9.2	9.3	9.0	9.0	9.3
Quality of the natural environment	9.0	9.5	9.0	9.0	9.0
Feeling of security	8.9		8.8	8.9	8.9
Places to visit in Wales	8.8	9.3	8.7	8.7	8.8
Feeling of welcome	8.8	8.9	8.8	8.7	8.8
Cleanliness of beaches	8.8	8.8	8.7	8.9	8.8
Overall value for money	8.5	8.9	8.3	8.5	8.6
Sea water quality	8.5	8.6	8.2	8.7	8.6
Cleanliness of streets	8.4	8.6	8.3	8.4	8.4
How pet friendly Wales is	8.2		8.3	8.1	8.2
Standard of tourist signposting	8.1	8.5	7.9	8.0	8.2
Shopping	7.9	8.6	7.8	7.6	8.0
Quality and availability of public transport	7.6		7.9	7.5	7.6
Accessibility for people with a disability	7.6		7.3	7.5	7.6
Cleanliness and availability of public toilets	7.5		7.3	7.7	7.5

Bases = all UK staying visitors: Stage 2 2016 (1,641); Stage 1 2013 (1,618); Stage 2 2013 (406). New (146); Lapsed (389); Repeat (1,098). Shaded boxes denote that 2013 comparison data was not available (new question).

Table 14 below provides details of the scores provided for each individual dimension by group segment, and clearly shows that ‘Younger 16-34, no children’ were less satisfied with all aspects of their trip than visitors overall, while ‘C2DE with children’ were more satisfied.

Table 14: Satisfaction with various aspects of visit to Wales by segmentation	ALL GROUPS	Younger, 16-34, no children	Post-family group, 35-54, no children	Post-family group, 55+, no children	Travelling with children, ABC1	Travelling with children, C2DE
Bases in brackets	(1,641)	(124)	(254)	(641)	(451)	(153)
Wales overall as a place to visit	9.2	8.8	9.2	9.2	9.2	9.3
Quality of the natural environment	9.0	8.9	9.1	9.0	9.1	9.2
Feeling of security	8.9	8.5	9.0	8.9	8.9	9.0
Places to visit in Wales	8.8	8.6	8.9	8.8	8.7	8.9
Feeling of welcome	8.8	8.5	8.8	8.8	8.8	9.0
Cleanliness of beaches	8.8	8.5	9.0	8.7	8.8	9.0
Overall value for money	8.5	8.3	8.6	8.5	8.5	8.7
Sea water quality	8.5	8.4	8.6	8.5	8.6	8.6
Cleanliness of streets	8.4	8.3	8.5	8.3	8.4	8.6
How pet friendly Wales is	8.2	8.0	8.4	8.2	8.0	8.7
Standard of tourist signposting	8.1	7.9	8.1	8.0	8.1	8.6
Shopping	7.9	7.4	8.0	7.9	7.8	8.2
Quality and availability of public transport	7.6	7.0	7.9	7.9	7.1	7.8
Accessibility for people with a disability	7.6	6.8	7.5	7.7	7.5	7.9
Cleanliness and availability of public toilets	7.5	7.3	7.7	7.6	7.3	7.6

Table 15 overleaf shows average satisfaction scores by the thirteen marketing regions within Wales.

Please note that caution should be taken when interpreting these results, which are intended to provide indicative rather than absolute figures due to small base sizes.

Table 15: Satisfaction with various aspects of visit to Wales by marketing region (Bases in brackets)	ALL WALES (1,641)	Cardiff, capital of Wales (118)	Carmarthenshire (104)	Ceredigion / Cardigan Bay (117)	Glamorgan Heritage Coast (45)	Isle of Anglesey (101)	Llandudno & Colwyn Bay (90)	Mid Wales & Brecon Beacons (170)	North East Wales (110)	Pembrokeshire (110)	Snowdonia Mountains and Coast (236)	South Wales Valleys (110)	Swansea Bay (168)	Wye Valley and Vale of Usk (162)
Wales overall as a place to visit	9.2	9.2	9.2	9.4	9.4	9.2	9.2	9.3	9.0	9.2	9.2	9.0	9.1	9.3
Quality of the natural environment	9.0	8.7	9.2	9.3	8.6	9.1	8.9	9.3	8.9	9.1	9.2	8.8	9.2	9.0
Feeling of security	8.9	8.8	8.9	9.1	8.8	9.0	9.0	9.2	8.9	9.1	8.9	8.5	9.0	9.0
Places to visit in Wales	8.8	8.7	8.9	8.8	8.9	8.7	8.9	8.9	8.6	8.8	8.8	8.7	8.6	8.9
Feeling of welcome	8.8	8.9	8.8	9.1	8.7	8.6	8.8	9.0	8.5	8.8	8.6	8.6	8.7	8.9
Cleanliness of beaches	8.8	9.1	8.5	9.0	8.5	8.8	8.8	8.8	8.5	9.2	8.7	8.4	8.8	8.8
Overall value for money	8.5	8.4	8.4	8.8	8.4	8.5	8.5	8.6	8.5	8.7	8.5	8.5	8.6	8.5
Sea water quality	8.5	8.6	8.3	8.8	8.0	8.7	8.4	8.7	8.3	9.1	8.3	8.5	8.6	8.3
Cleanliness of streets	8.4	8.3	8.1	8.7	8.5	8.5	8.6	8.5	8.3	8.7	8.6	7.7	8.3	8.3
How pet friendly Wales is	8.2	8.3	8.0	8.6	8.5	8.4	8.6	8.2	8.6	8.4	8.3	7.7	8.1	8.0
Standard of tourist signposting	8.1	7.9	7.8	8.3	8.2	8.2	8.5	8.4	8.2	8.1	8.2	7.8	8.1	8.1
Shopping	7.9	8.6	7.1	7.7	8.4	7.8	8.1	7.5	8.1	7.9	7.4	8.1	7.5	7.9
Quality and availability of public transport	7.6	8.4	6.9	7.6	8.7	6.9	8.3	7.2	7.3	7.5	7.1	7.3	7.7	7.4
Accessibility for people with a disability	7.6	7.5	7.8	7.7	8.6	7.4	7.8	7.3	7.9	7.3	7.4	7.5	7.4	7.4
Cleanliness and availability of public toilets	7.5	8.0	7.1	7.8	7.7	7.2	7.2	7.7	7.7	7.7	7.4	7.1	7.7	7.5

The small numbers of visitors (73 people out of 1,641) giving a score of 1 to 7/10 for their overall experience of visiting Wales were asked what would have improved their experience, or encouraged them to give a better score.

The main comment made was ‘better weather’ (21%), while around another 1 in 10 felt that people could be friendlier or more welcoming (10%) or would like to see town centres improved or regenerated (8%) – see Table 16 below for more details.

Table 16: How the visit experience could have been improved	
Visitors giving a score of 1-7 for ‘Wales overall as a place to visit’	2016 %
Better weather	21
Friendlier people / more welcoming	10
Town environments could be improved (regeneration, better shopping)	8
Not enough accommodation / better / cheaper	6
More interesting places to visit / more activities with children	6
Better signs / don’t like two languages on the signs	5
More variety of food / better quality / local produce / too expensive	4
More advertising on what is available / on offer	4
More public transport	3
Could be more dog friendly / not sure where dogs are allowed	3
Issues with disabled access / unable to get around in a wheelchair	3
Other	17
Nothing in particular	23
Don’t know	3

*Bases = UK staying visitors giving a score of 1-7 for ‘Wales overall as a place to visit’: Stage 2 2016 (73).
NB: percentages do not add up to 100% as more than one response possible.*

Some of the general comments received from these visitors included:

“All the rain! We visited Wales 40 years ago and it rained...and it rained non-stop on this visit!”

“I don’t think it’s as welcoming as Devon, Somerset or Cornwall; it’s not as good at receiving tourists as the West of England.”

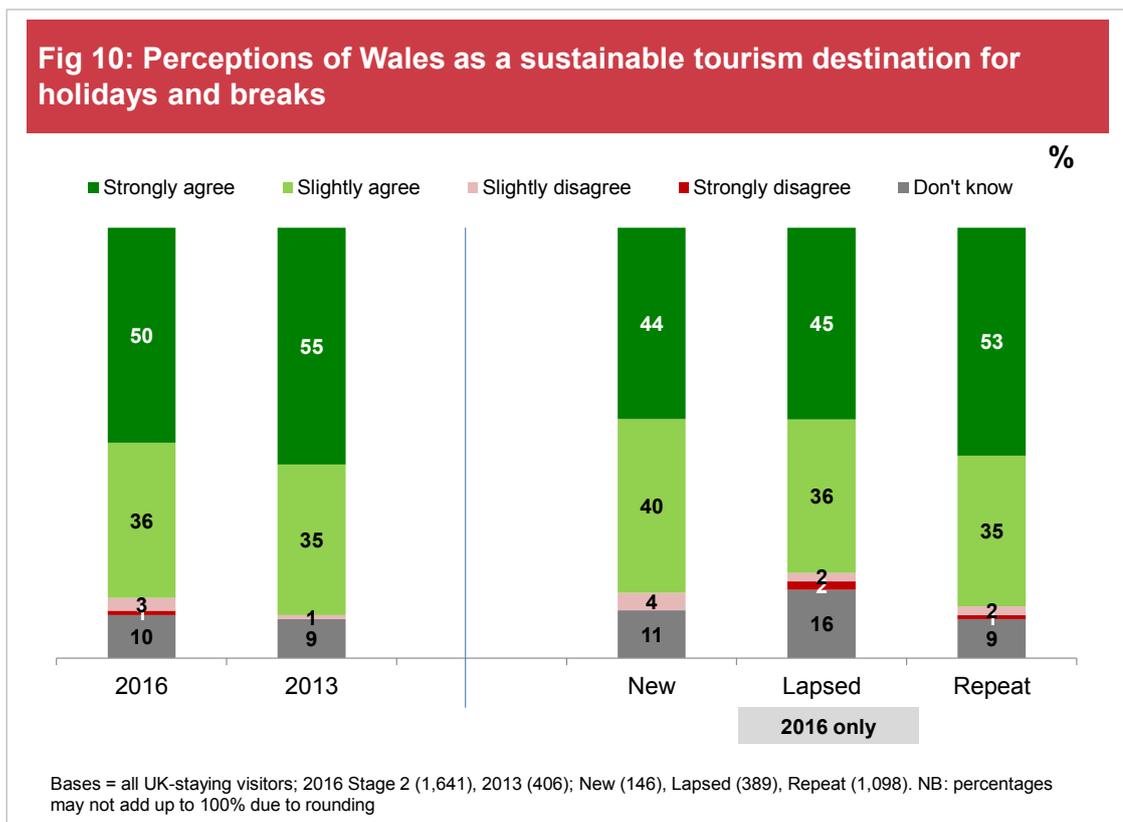
“Not impressed with the town really; Secret Escapes normally represents a higher end stay but the hotel was nowhere near to that.”

“The variety of the scenery; at some places there’s nothing to see, and some places are poorly publicised.”

4.4.2 Sustainability

When asked whether *Wales represents a sustainable tourism destination for holidays and breaks*, the vast majority of UK staying visitors agreed (86%), with half of these strongly agreeing with this statement. Levels of agreement were comparable with 2013 (90% agreement).

Repeat visitors to Wales were more likely to strongly agree than lapsed or new visitors, suggesting that familiarity and a desire to return impact on perceptions of sustainability – see Figure 10 below.



There were certain differences in opinion according to where people were interviewed; visitors to the Cardiff, capital of Wales and Isle of Anglesey marketing regions were less likely to agree that *Wales represents a sustainable tourism destination for holidays and breaks* compared to the all Wales average (79% and 77% respectively cf. 86% all Wales).

4.4.3 Sense of place

Perceptions of the distinctiveness of Wales as a tourism destination were explored in 2016 through some new questions at Stage 2 (not included in the 2013 survey). When asked whether any aspects of their visit included features that were distinctively Welsh or had a particular local character, heritage sites and visitor attractions were each chosen by around four in ten UK staying visitors as setting Wales apart from other destinations, while around three in ten said they found the food and drink to be distinctively Welsh.

UK staying visitors' opinions were divided on the importance of being able to see or hear the Welsh language during their visit to Wales, with similar proportions regarding it as important as felt it was unimportant (at 50% and 48% respectively).

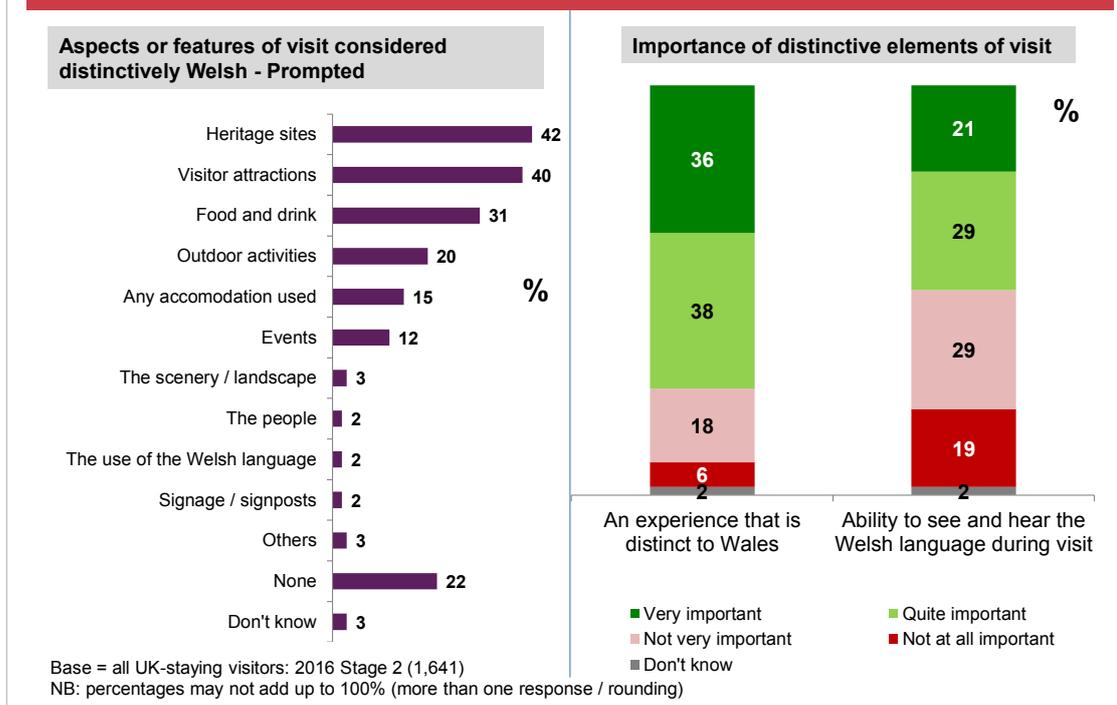
“Keep it Welsh. The Welsh language is important.”

In contrast, hearing or seeing the Welsh language during their visit was regarded as important by a higher proportion of overseas visitors to Wales (58%).

Amongst UK staying visitors, a clear majority of nearly three quarters (74%) felt it was important that their trip gave them an experience that was distinctive to Wales and that they couldn't have anywhere else, however – see Figure 9 overleaf.

An even larger majority of over eight in ten overseas visitors (82%) felt this was important.

Fig 9: Perceptions of sense of place when visiting Wales



Moreover, visitors from Wales were more likely to say that it was very important that their trip gave them an experience that was distinctive to Wales (44%) compared to those from England (35%). Similarly, Welsh visitors were much more likely to consider the use the Welsh language to be very important (40% for Wales residents cf. 18% England residents).

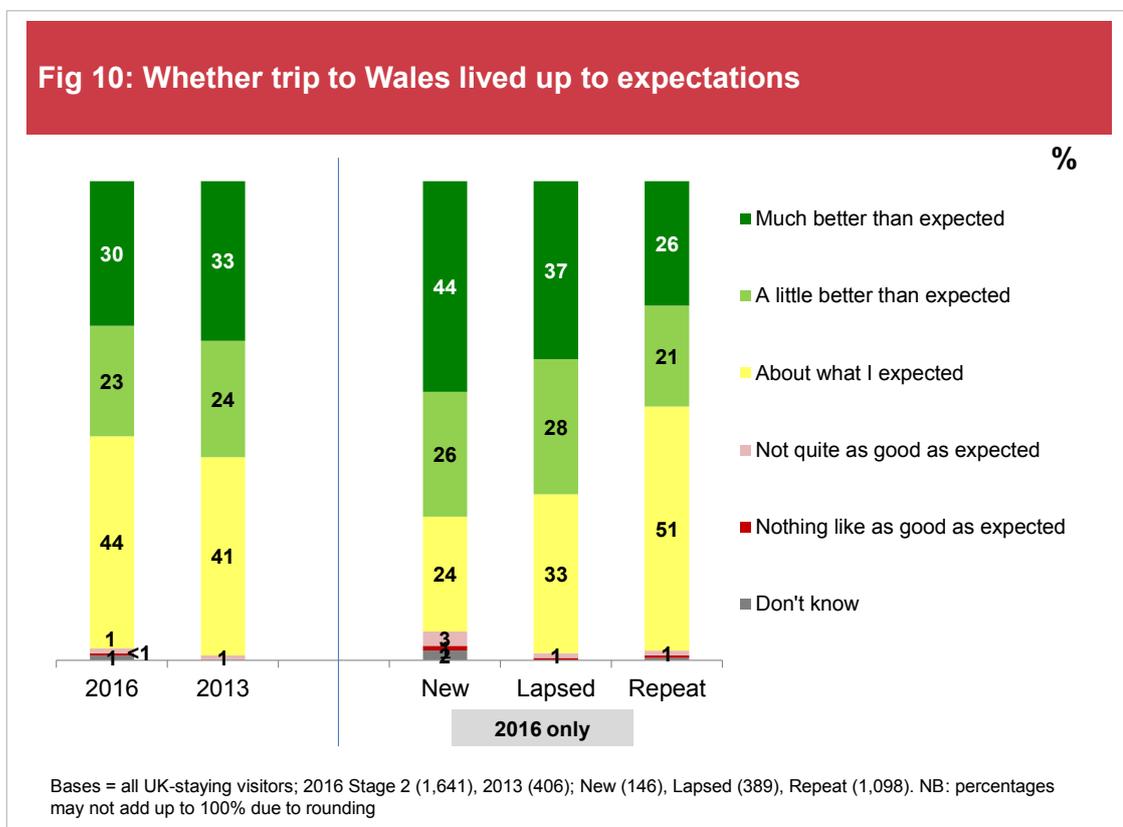
In terms of segmentation, 'Younger 16-34, no children' and 'Travelling with children, C2DE' groups were most likely to say that it was important that their trip to Wales gave them a distinctive experience (82% and 84% respectively). There were no noticeable differences in opinion between segments on the Welsh language.

4.4.4 Expectations

Wales exceeded expectations for over half of UK staying visitors in 2016, with 53% saying that their trip was better than expected (rising to 70% amongst new visitors). A further two fifths felt that their expectations had been met (44%); this rose to 51% amongst repeat visitors who are more likely to know what Wales has to offer. While only 1% of UK staying visitors said that their trip was not as good as expected, the proportion disappointed was highest amongst new visitors (at 4%).

Compared to 2013, slightly fewer visitors said that the trip exceeded their expectations (53% cf. 57% in 2013), but the level of those saying it failed to meet expectations remains unchanged.

“The trip was much better than expected; initially I didn’t want to go as I prefer to go abroad but I was pleasantly surprised. The only downfall was that we went out of season, making it hard to find activities for my son. I would like to visit again in season.”



In terms of segmentation, ‘Younger 16-34, no children’ and ‘Post-family, 35-54 no children’ groups were most likely to say that their expectations of Wales had been exceeded (61% and 60% respectively).

Table 17 overleaf shows the proportions of visitors to different areas of Wales saying their expectations were exceeded, met or not met. Higher than average proportions reported that their expectations had been exceeded in Swansea Bay, Llandudno / Colwyn Bay, Cardiff, capital of Wales and Snowdonia Mountains and Coast, while lower than average proportions said the same in North East Wales, Pembrokeshire and Wye Valley / Vale of Usk.

Please note that caution should be taken when interpreting these results, which are intended to provide indicative rather than absolute figures due to small base sizes.

Table 17: Whether expectations were met by marketing region (Bases in brackets)	ALL WALES (1,641)	Cardiff, capital of Wales (118)	Carmarthenshire (104)	Ceredigion / Cardigan Bay (117)	Glamorgan Heritage Coast (45)	Isle of Anglesey (101)	Llandudno & Colwyn Bay (90)	Mid Wales & Brecon Beacons (170)	North East Wales (110)	Pembrokeshire (110)	Snowdonia Mountains and Coast (236)	South Wales Valleys (110)	Swansea Bay (168)	Wye Valley and Vale of Usk (162)
Expectations exceeded	54	59	49	52	56	49	60	52	45	48	59	53	63	48
Expectations met	44	36	48	48	44	48	39	48	51	50	39	45	36	51
Expectations not met	1	3	2	-	-	4	-	1	3	1	1	2	2	1

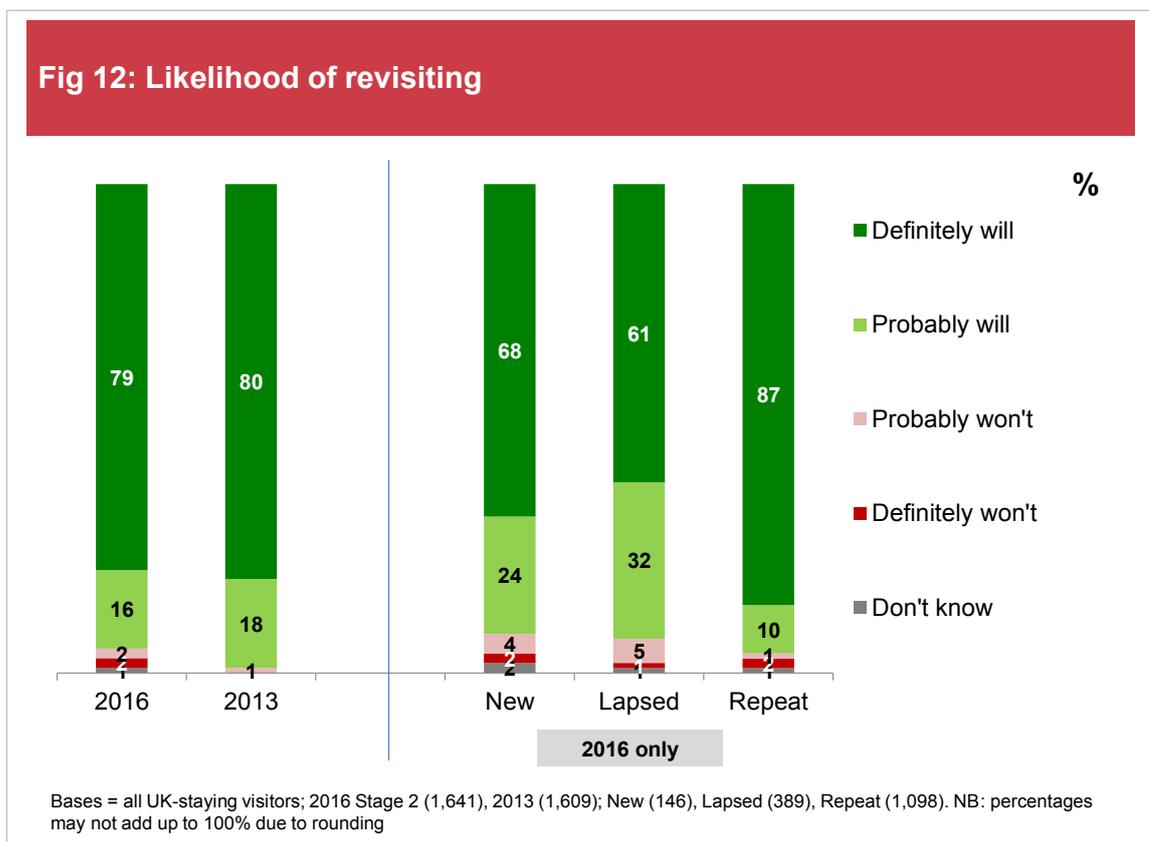
In terms of segmentation, 'Younger 16-34, no children' and 'Post-family 35-54' were most likely to report that their trip was better than expected (61% and 60% respectively). Looking at home region, people living in England were slightly more likely to say that their trip had exceeded their expectations (54%) compared to those living in Wales (52%), perhaps because people from Wales know what is on offer in the region.

4.4.5 Returning to Wales in future

Over 9 in 10 UK staying visitors said that they would visit Wales again in future (95%), with 79% saying they would definitely visit again (in line with 2013 figures). Only a very small proportion of visitors (4%) said they were not likely to make another visit to Wales.

Repeat visitors were most likely to say that they would definitely visit Wales again (87%), although nearly 7 in 10 new visitors said the same (68%). Lapsed visitors were the least likely to definitely intend to return (61%) – see Figure 12 below.

“We can't wait to come back next year; we are already getting excited as we are planning to come for longer next time around. We love the place, there's so much to do, and the sights are fantastic too”.



Nine in ten visitors from Wales said they would definitely visit again (90%), although the vast majority of visitors from England said the same (78%). In terms of segmentation; ‘C2DE with children’ were most likely to report that they would definitely return for another visit (85%), while ‘Younger 16-34, no children’ were least likely (70%).

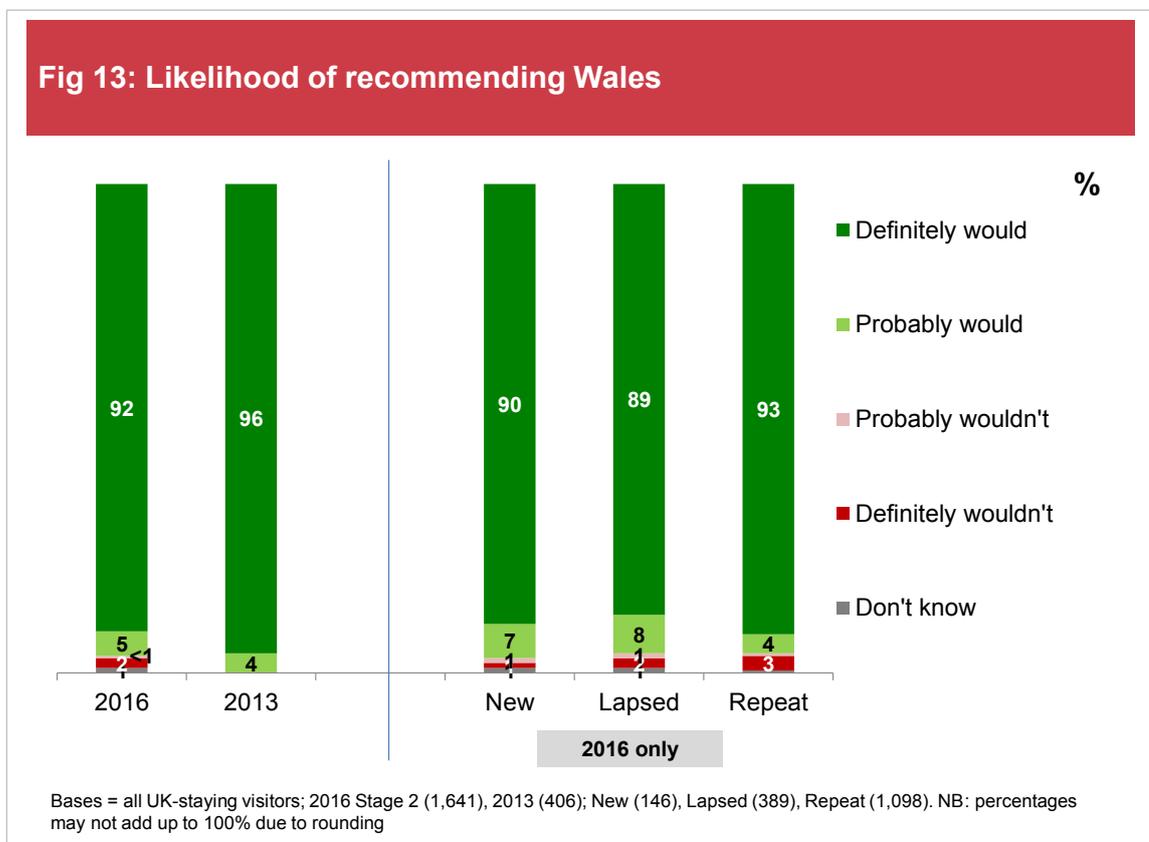
4.4.6 Recommendation

Reflecting the high levels of visitor satisfaction and strong likelihood of returning to Wales in future, over 9 in 10 UK staying visitors said that they would recommend Wales as a place to visit to friends and family (97%); virtually all of these would definitely recommend Wales as a place to visit (93% - down slightly from 96% in 2013). Only 2% said that they would not recommend Wales to a friend or relative.

There was little variation in these figures depending on whether visitors were new to Wales or had been before – see Figure 13 below.

“I really enjoyed it, I would definitely go back and would definitely recommend it. Rhyl wasn't my favourite but it was cheap and cheerful and that was what we were going for.”

“I would not recommend Wales as most people don't holiday in this country. I liked it because my friends were there, but I didn't think it was particularly special and there wasn't much to do when it was raining.”



Virtually all visitors from Wales said they would definitely recommend Wales as a place to visit (98%), with 91% of visitors from England saying the same. In terms of segmentation; ‘Post-family 35-54’ were most likely to definitely recommend Wales (94%), while ‘Younger 16-34, no children’ were least likely (87%).

4.5 Marketing awareness and information

4.5.1 Awareness of advertising, marketing and publicity

When interviewed face-to-face during their trip to Wales, UK staying visitors were asked whether they had seen any advertising, marketing or communications for Wales before they visited; two thirds reported that they had.

Most of these said they had seen advertising on TV (41% overall): smaller proportions had heard Wales mentioned or recommended by other people (15%), had seen something online at www.visitwales.com or on other websites (14% and 13% respectively) or had read an article in a newspaper or magazine (12%).

Staying visitors living in Wales were more likely to have seen advertising and marketing for Wales than those living in England (74% cf. 65%), and, generally speaking, more Wales residents had seen each of the various types of advertising, marketing and publicity than England residents. The exception to this was word of mouth recommendation and online media – Table 18 below provides full details of the communications seen or heard.

Table 18: Types of advertising, marketing and publicity for Wales seen before visit	2016 all %	New %	Repeat %	Live in Wales %	Live in England %
SEEN ANY MARKETING / PUBLICITY	66	64	66	74	65
TV advertising	41	37	42	53	40
Word of mouth / conversations with people	15	16	15	14	15
www.visitwales.com	14	11	14	15	13
Other websites	13	14	13	14	13
Read an article in a newspaper or magazine	12	8	13	18	11
TV programme	11	10	11	18	10
Social media	9	7	9	14	8
Saw an advert in a newspaper / magazine	8	6	9	15	7
Outdoor advertisements (e.g. posters)	7	4	7	16	5
Online ads	7	6	7	10	7
Radio advertising or programmes	5	4	5	13	3
Direct mail / flyer	3	1	3	4	3
Email newsletter	2	1	2	4	2
Cinema advertising	1	1	1	3	1
Other	2	3	2	2	2
None of these	34	35	34	26	35
Don't know	1	1	1	<1	1

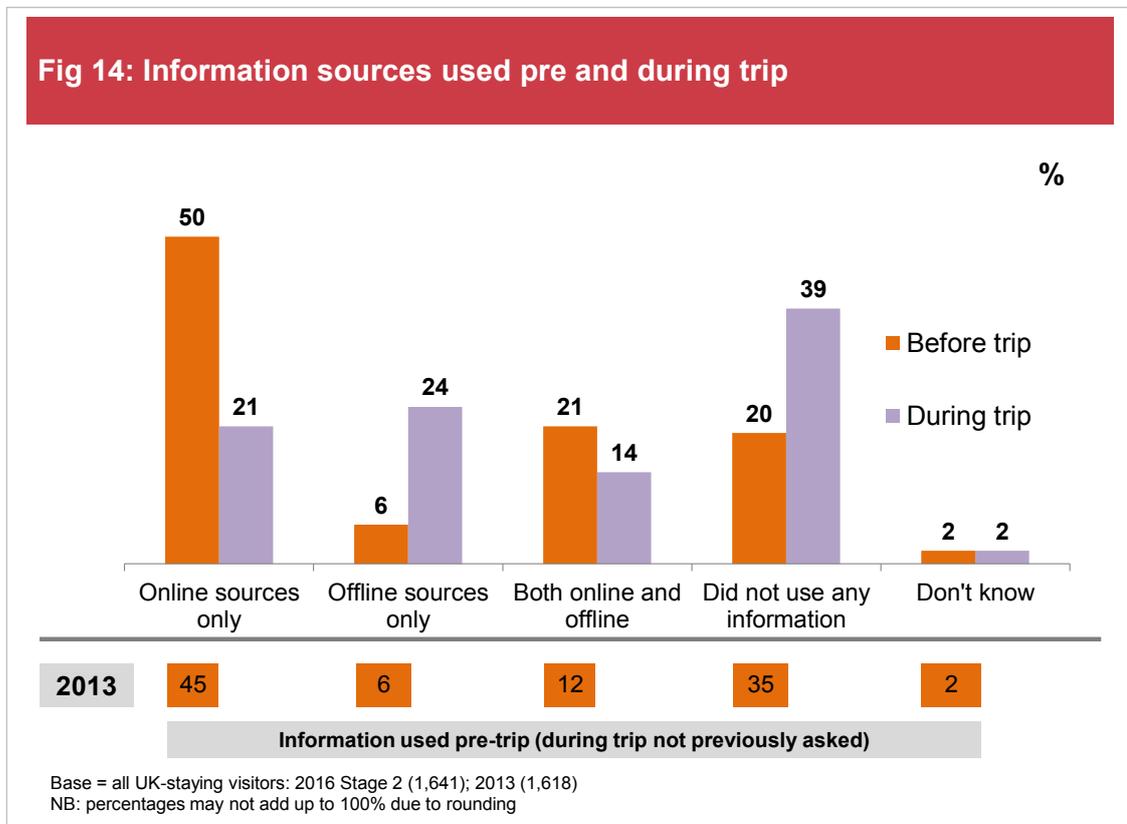
Bases = all UK staying visitors: Stage 1 2016 (2,892); Stage 2 2016 (1,641); New (355); Repeat (2,509). Live in Wales (383), Live in England (2,441). NB: percentages do not add up to 100% as more than one response possible.

Some variations in awareness of marketing and publicity was evident by region; overall awareness of communications about Wales was highest among UK staying visitors coming to South East Wales (75%), and lowest amongst those visiting North Wales (54%).

4.5.2 Sources of information used before and during visit

Almost 8 in 10 UK staying visitors (78%) used some information sources to plan their trip to Wales before visiting; online sources (such as websites and apps) were most frequently used (71%; up from 57% in 2013), while offline sources (such as guidebooks and leaflets) were used in advance by around half as many (27%, up from 18% in 2013).

Information use decreased during the trip, with just under 6 in 10 (59%) UK staying visitors saying they consulted any sources of information whilst on holiday in Wales. During the trip a more even balance between offline (38%) and online (35%) sources is evident – see Figure 14 below.



General search engines such as Google proved to be the most popular online information channel both before and during the trip (used by 48% and 55% respectively). Around a fifth used the Visit Wales website www.visitwales.com before their holiday (19%), although use of the website dropped to 11% during the trip. Apps were more likely to be used by visitors while in Wales during their trip (13%) than before they came (7%), as was social media (12% cf. 8%) – see Table 19 below for more details.

Table 19: Online sources of information used before / during trip	Before visit %	During visit %
% all UK staying visitors using online sources	71	35

Specific sources used by those accessing online information		
Search engines (e.g. Google)	48	55
Visit Wales / National Tourist Board website	19	11
Tourism business websites (e.g. accommodation)	14	9
Review websites (e.g. TripAdvisor)	12	9
Accommodation booking website (e.g. laterooms)	10	1
Email	9	7
Social media	8	12
Apps	7	13
Specific attraction websites	5	7
Regional or Local Authority websites	1	3
Navigation sites (e.g. Google Maps)	3	10
Others	11	9
Don't know / can't remember	11	14

Bases = all UK staying visitors: Stage 2 2016 (1,641). All visitors using online sources before visit (1,166); during visit (572). NB percentages may not add to up to 100% as more than one response possible.

The most popular offline source of information for visitors before coming to Wales was word of mouth (29%); this dropped to just 14% during trips. The use of leaflets rose sharply during trips, however (at 56% of those using offline information compared to 26% of this group doing so before the visit).

Use of brochures produced by Visit Wales and local authorities was limited (pre-trip = 10% and 11% respectively), although use of local authority brochures increased slightly during trips (to 14%).

Use of Tourist Information Centres (TICs) before visiting Wales was also low at 3%. However, during trips, TIC usage (both remote and in person) increased noticeably to 18% – see Table 20 overleaf for more details.

Table 20: Offline sources of information used before / during trip	Before visit %	During visit %
% all UK staying visitors using offline sources	27	38

Specific sources used by those accessing offline information		
Spoke to friends / relatives / colleagues	29	14
Leaflets	26	56
Guidebook	15	9
Brochure from Local Authority / local Tourist Board	11	14
Brochure from Visit Wales / National Tourist Board	10	8
Maps	7	4
Local knowledge / previous visits	5	1
Newspaper or magazine	4	3
Tourist Information Centre (phone or email)	3	18
Spoke to an accommodation provider	3	11
Camping / caravanning books and magazines	2	1
National Trust books	2	1
Others	5	3
Don't know / can't remember	7	2

Bases = all UK staying visitors: Stage 2 2016 (1,641). All visitors using offline sources before visit (454); during visit (641). NB percentages may not add to up to 100% as more than one response possible.

4.5.3 The Year of Adventure 2016

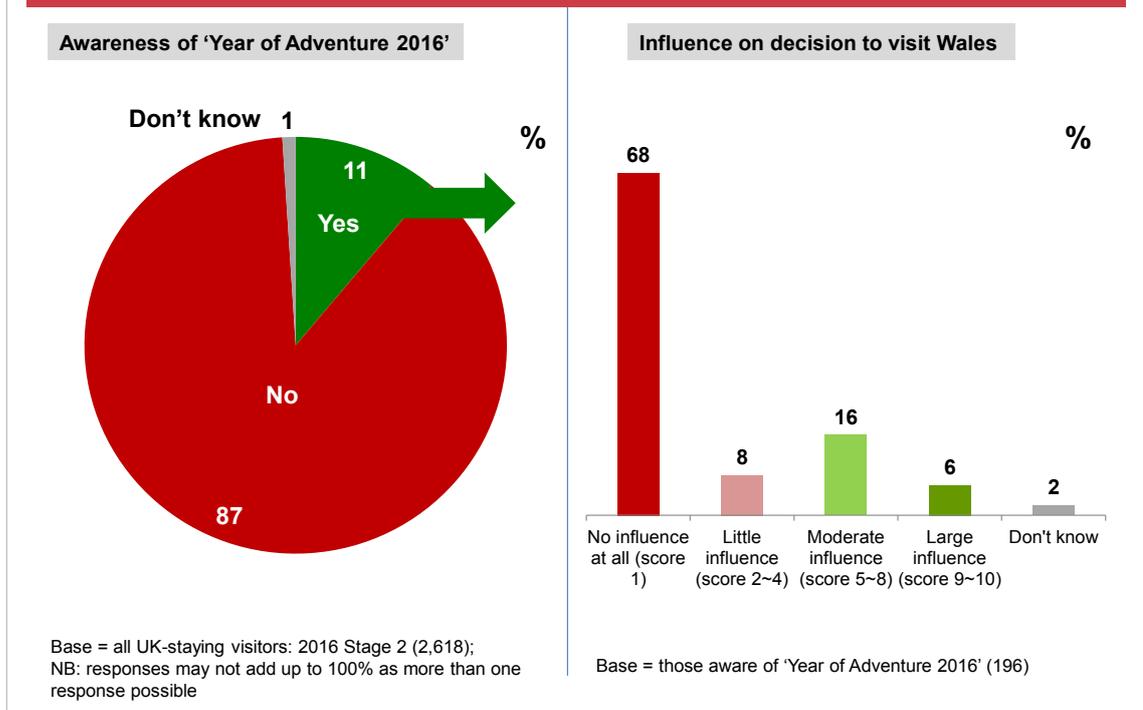
In 2016, Visit Wales launched a campaign to promote Wales as the ‘*world’s capital for adventure tourism*’, beginning with ‘Year of Adventure 2016’ and to be followed by ‘Year of Legends 2017’ and ‘Year of the Sea 2018’.

The Welsh Government has invested in adventure tourism products in recent years, and Wales now hosts such attractions as Zip World, the world’s largest underground trampoline, mountain biking facilities at centres such as Coed y Brenin, Bike Park Wales and Antur Stiniog, and 870 miles of the Wales Coast Path. Adventure events taking place in Wales in 2016 included the Velathon, IronMan and Survival of the Fittest.

UK staying visitors were asked whether they had seen any advertising, marketing or publicity for ‘Year of Adventure 2016’; only 11% said that they had. Awareness levels were highest amongst visitors to Mid Wales (15%) and lowest in South East Wales (9%).

Of those who had seen any marketing about ‘Year of Adventure 2016’, the majority said that the campaign had no influence on their decision to visit Wales (68%). However, almost a quarter of these visitors (22%) said that the campaign had influenced their decision to a certain extent, with 6% saying it had had a strong influence – see Figure 15 overleaf.

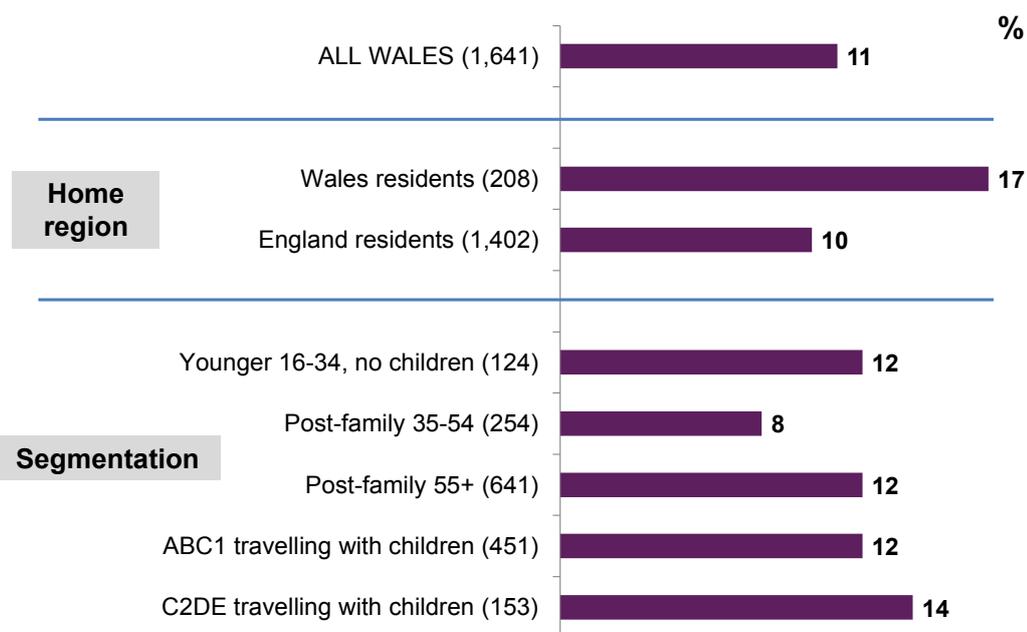
Fig 15: Awareness of 'Year of Adventure 2016' and influence on decision to Visit Wales



Levels of awareness of the 'Year of Adventure 2016' were higher amongst visitors from Wales compared to those from England (17% cf. 10%).

In terms of segmentation, awareness levels were highest amongst the 'C2DE travelling with children' group (14%) and lowest amongst the 'Post-family 35-54' group. However, the campaign had the most impact amongst this latter group, with 11% reporting that the 'Year of Adventure 2016' had had a major influence on their decision to visit Wales – see Figure 16 overleaf.

Fig 16: Awareness of 'Year of Adventure 2016' by home region and segmentation



Bases in brackets
 NB: percentages may not add up to 100% due to rounding

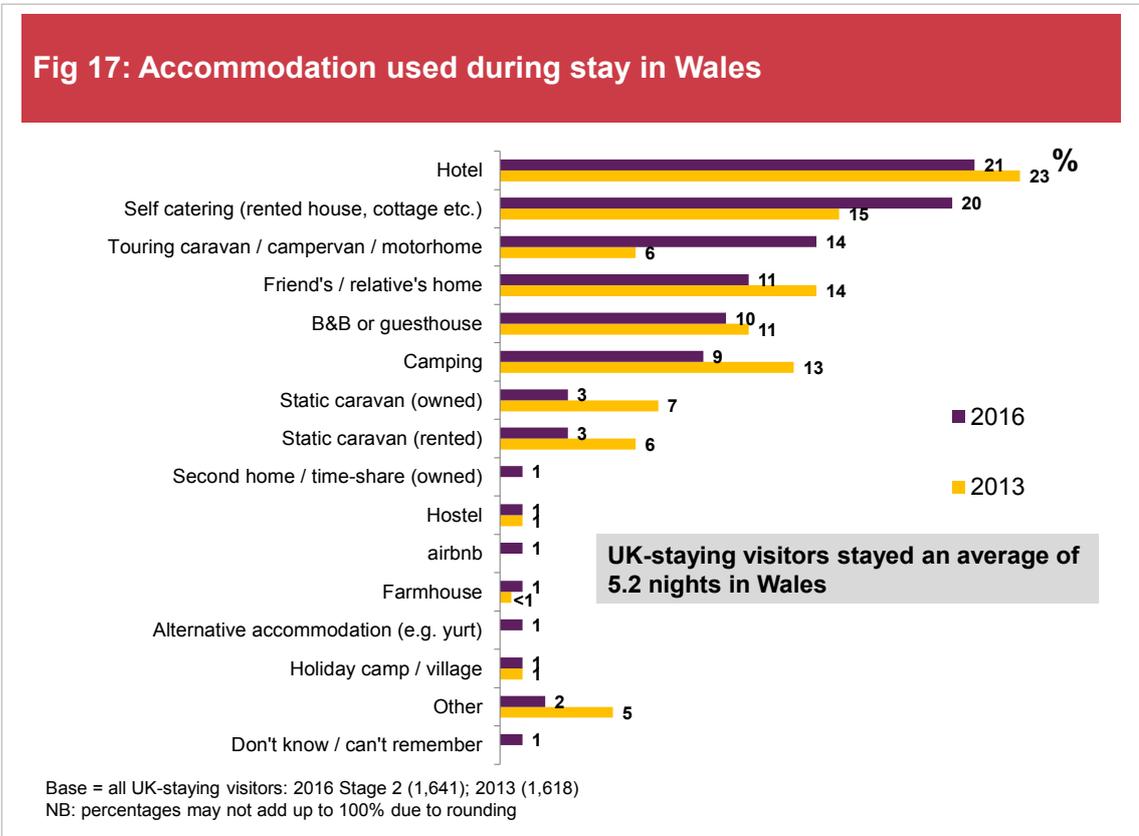
4.6 Accommodation used and eating out

4.6.1 Accommodation used

A variety of different types of accommodation were used by UK staying visitors in 2016; hotels and self-catering accommodation were most popular, with each being used by a fifth of staying visitors. While usage of hotels decreased marginally in 2016 (21% cf. 23%) the use of self-catering houses and cottages increased to 20% from 15%.

Touring caravans / campervans were considerably more popular in 2016 than in 2013 (14% cf. 6%), while camping declined (9% cf. 13%). Use of Airbnb and alternative accommodation (e.g. yurts) was low (at 1% each) but neither featured in 2013.

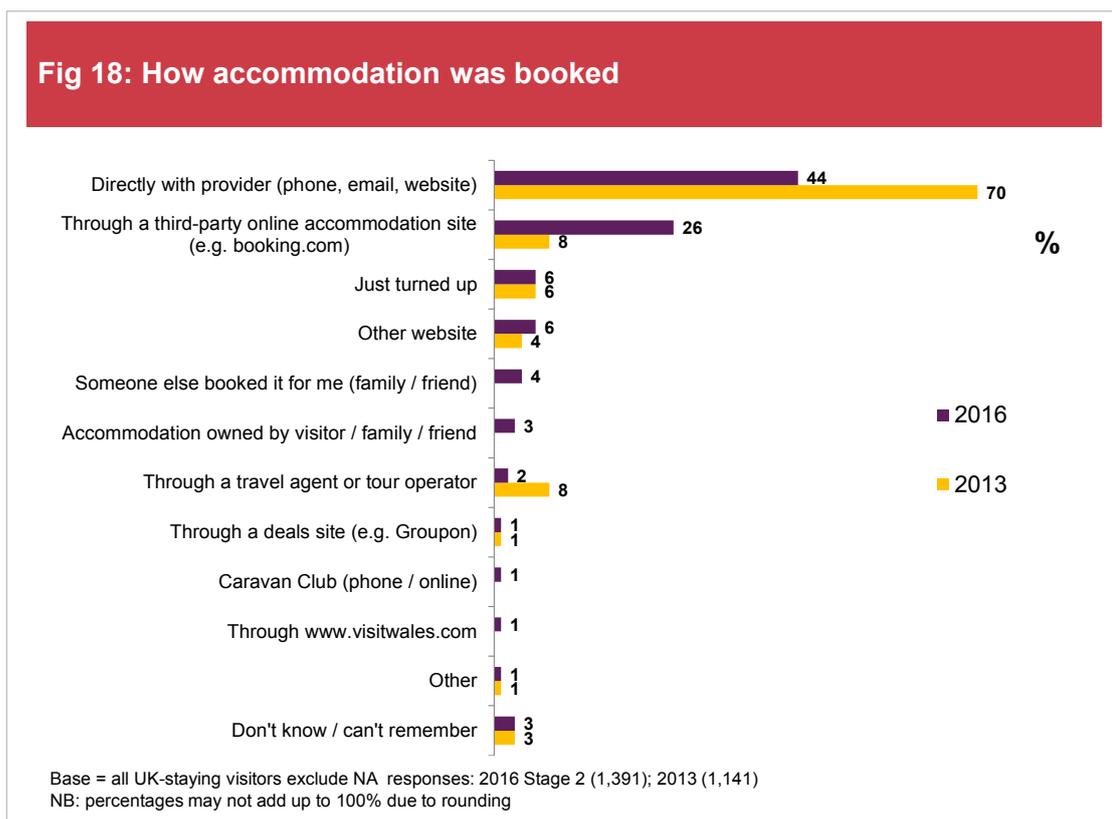
UK staying visitors stayed an average of 5.2 nights in Wales in 2016 – see Figure 17 below.



4.6.2 Booking accommodation

Booking through an accommodation provider has declined significantly since 2013, although this still remains the most common method of booking. Just over two fifths (44%) of those staying in paid accommodation booked directly with the provider in 2016 (down from 70%). Use of travel agents to book accommodation also decreased to just 2% (down from 8% in 2013).

In contrast, the use of third-party booking sites such as booking.com and Expedia has increased sharply, with a quarter of UK visitors staying in paid accommodation in Wales in 2016 using such sites to organise accommodation for their recent trip (26%, up from 8% in 2013) – see Figure 18 below.



'Younger, 16-34, no children' visitor groups varied from other groups in terms of how they booked their accommodation; this was the only group that favoured using third-party booking sites (39%) over contacting the accommodation provider directly (32%).

'Post-family group, 35-54, no children' were also more likely than average to use third-party booking sites (36%), while 'Travelling with children, C2DE' were least likely to have used this channel (18%); this group were most likely to just show up at an accommodation provider and book when they arrived (11%) – see Table 21 for more details.

Table 21: How accommodation was booked by segmentation	ALL GROUPS	Younger, 16-34, no children	Post-family group, 35-54, no children	Post-family group, 55+, no children	Travelling with children, ABC1	Travelling with children, C2DE
Bases in brackets = those using paid accommodation during their trip	(1,388)	(112)	(220)	(539)	(379)	(125)
Directly with provider (phone, email, website)	44	32	42	43	49	46
Through a third-party online accommodation site (e.g. booking.com)	26	39	36	25	22	18
Just turned up	6	9	3	4	8	11
Other website	6	3	6	5	3	2
Someone else booked it for me (family / friend)	4	9	5	7	5	4
Accommodation owned by visitor / family / friend	3	-	2	3	5	2
Through a travel agent or tour operator	2	2	1	4	1	3
Through a deals site (e.g. Groupon)	1	1	2	1	2	2
Caravan Club (phone / online)	1	1	-	2	1	2
Through www.visitwales.com	1	1	1	1	1	2
Other	1	-	1	1	<1	2
Don't know / can't remember	3	4	1	3	4	6

4.6.3 Satisfaction with accommodation

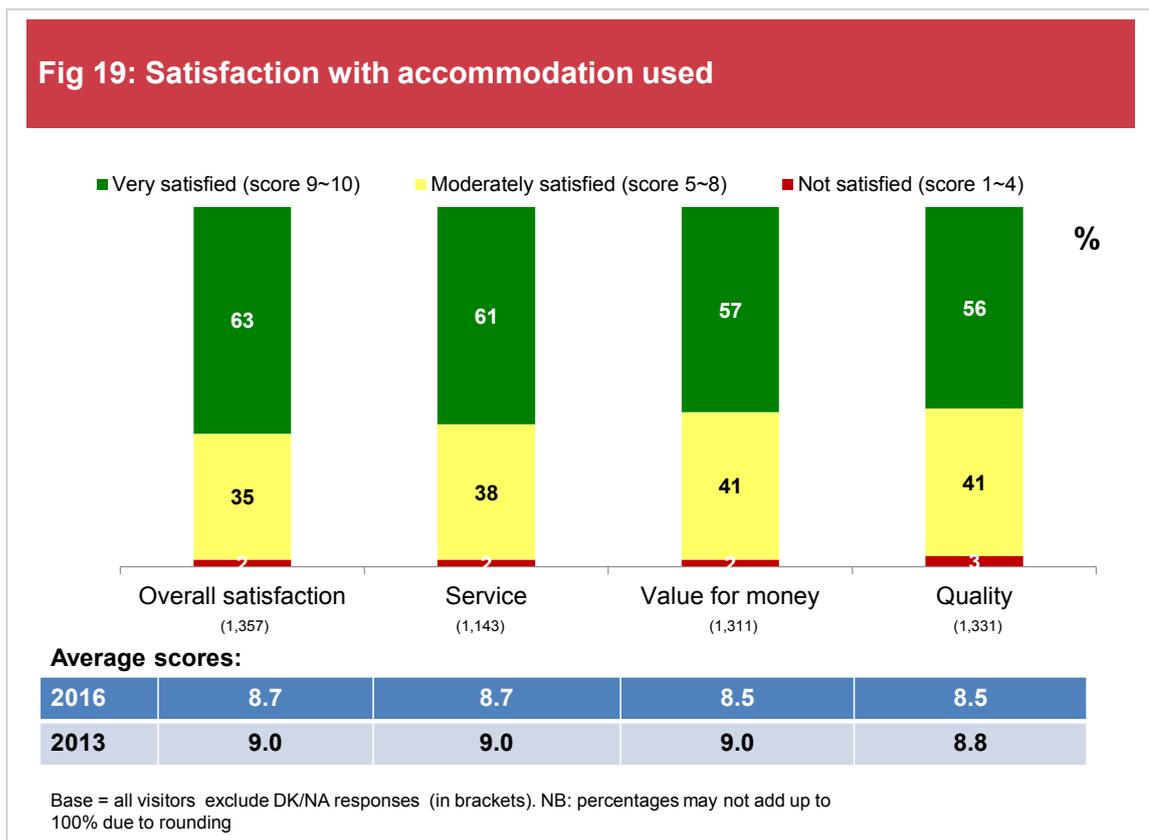
UK staying visitors using paid accommodation during their trip to Wales were asked how satisfied they were with various aspects of it. On the whole, satisfaction was high, with almost two thirds of visitors saying they were very satisfied overall with the accommodation used (63%).

Moreover, around 6 in 10 were very satisfied with the service at the accommodation (61%), its value for money (57%) and quality (56%), although for each dimension a sizeable minority of around 3 to 4 in 10 were only fairly satisfied. That said, only very small proportions of visitors were dissatisfied with any aspect of the accommodation in which they stayed.

“There was a high standard of accommodation in all three places we stayed...the hotels were great - they catered for all my needs.”

“The accommodation was awful – we found it on booking.com. It was very sub-standard, the price wasn’t a lot, but Wales is usually reasonable for price so I expected normal standards, but the quality was awful.”

Average scores for all aspects of accommodation used declined slightly in 2016 compared to 2013 – see Figure 19 below.



UK staying visitors who were camping / caravanning showed the highest levels of overall satisfaction with their accommodation, as did those staying in self-catering accommodation:

- Camping = 67% giving high scores
- Touring caravan = 70% giving high scores
- Static caravan = 66% giving high scores
- Self-catering = 69% giving high score

In contrast, those visitors staying in serviced accommodation such as hotels and B&Bs/guesthouses tended to be less satisfied overall with their accommodation:

- Hotels = 51% giving high scores
- B&Bs/guesthouses = 55% giving high scores.

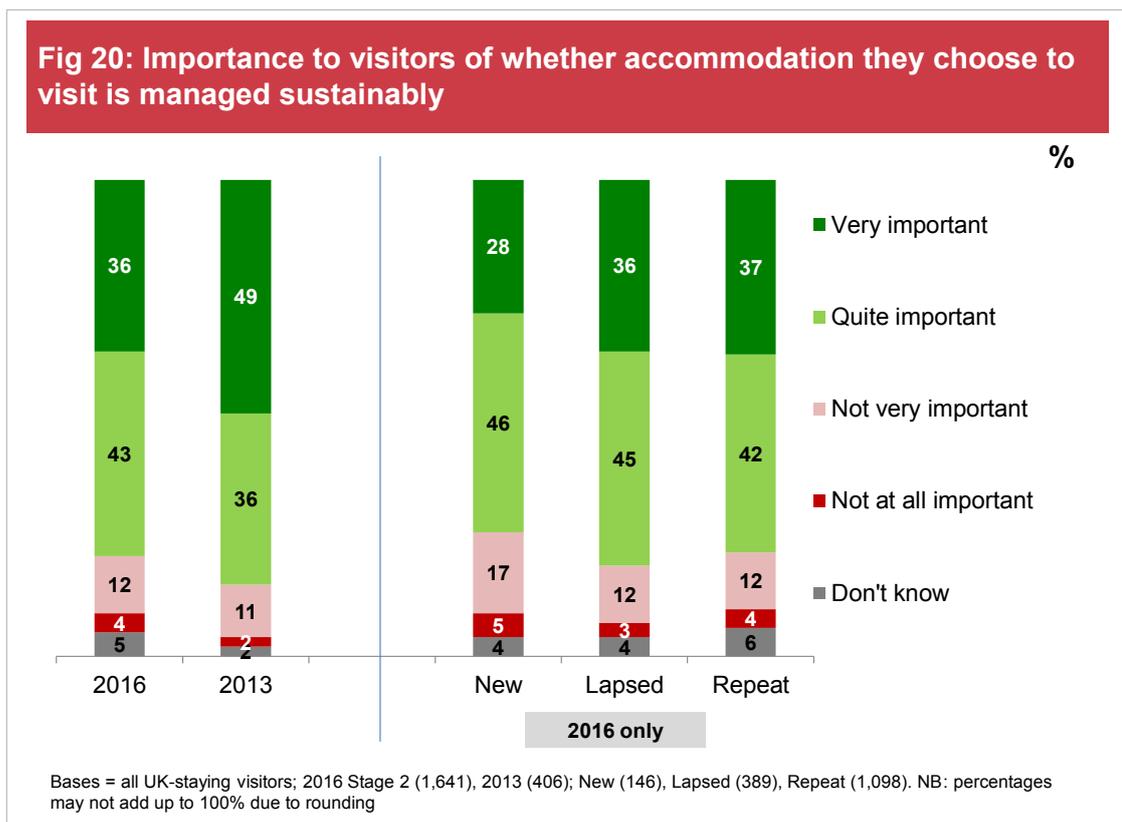
Satisfaction with accommodation varied across different regions in Wales; ratings tended to be higher than average amongst visitors to Ceredigion / Cardigan Bay and Mid Wales / Brecon Beacons and Pembrokeshire, and lower than average in Carmarthenshire, Glamorgan Heritage Coast, North East Wales and Snowdonia Mountains and Coast - see Table 22 below.

Table 22: Average scores for accommodation used by marketing region		Overall satisfaction	Service	Value for money	Quality
Bases in brackets (NB some very small)					
ALL WALES	(1,641)	8.7	8.7	8.5	8.5
Cardiff, capital of Wales	(118)	8.7	8.7	8.5	8.6
Carmarthenshire	(104)	8.4	8.4	8.4	8.2
Ceredigion / Cardigan Bay	(117)	8.9	8.8	8.8	8.6
Glamorgan Heritage Coast	(45)	8.2	8.1	8.3	8.1
Isle of Anglesey	(101)	8.8	8.7	8.7	8.4
Llandudno and Colwyn Bay	(90)	8.8	8.9	8.6	8.5
Mid Wales and Brecon Beacons	(170)	9.0	8.8	8.7	8.8
North East Wales	(110)	8.5	8.3	8.4	8.3
Pembrokeshire	(110)	8.9	9.0	8.6	8.8
Snowdonia Mountains and Coast	(236)	8.6	8.6	8.4	8.4
South Wales Valleys	(110)	8.8	8.7	8.7	8.5
Swansea Bay	(168)	8.6	8.7	8.4	8.4
Wye Valley and Vale of Usk	(162)	8.6	8.6	8.5	8.4

4.6.4 Sustainability of accommodation

Nearly 8 in 10 UK staying visitors (79%) said it was important to them that any accommodation they choose to visit is managed sustainably; 36% said it is very important to them (down from 49% in 2013) while it is quite important to another 43% (up from 36%). Using accommodation which is managed sustainably does not matter to only 16% of visitors (up from 13%).

Repeat and lapsed visitors were more likely to consider the sustainable management of accommodation to be very important (at 37% and 36% respectively) compared to new visitors (28%) – see Figure 20 below.



4.6.5 Eating out

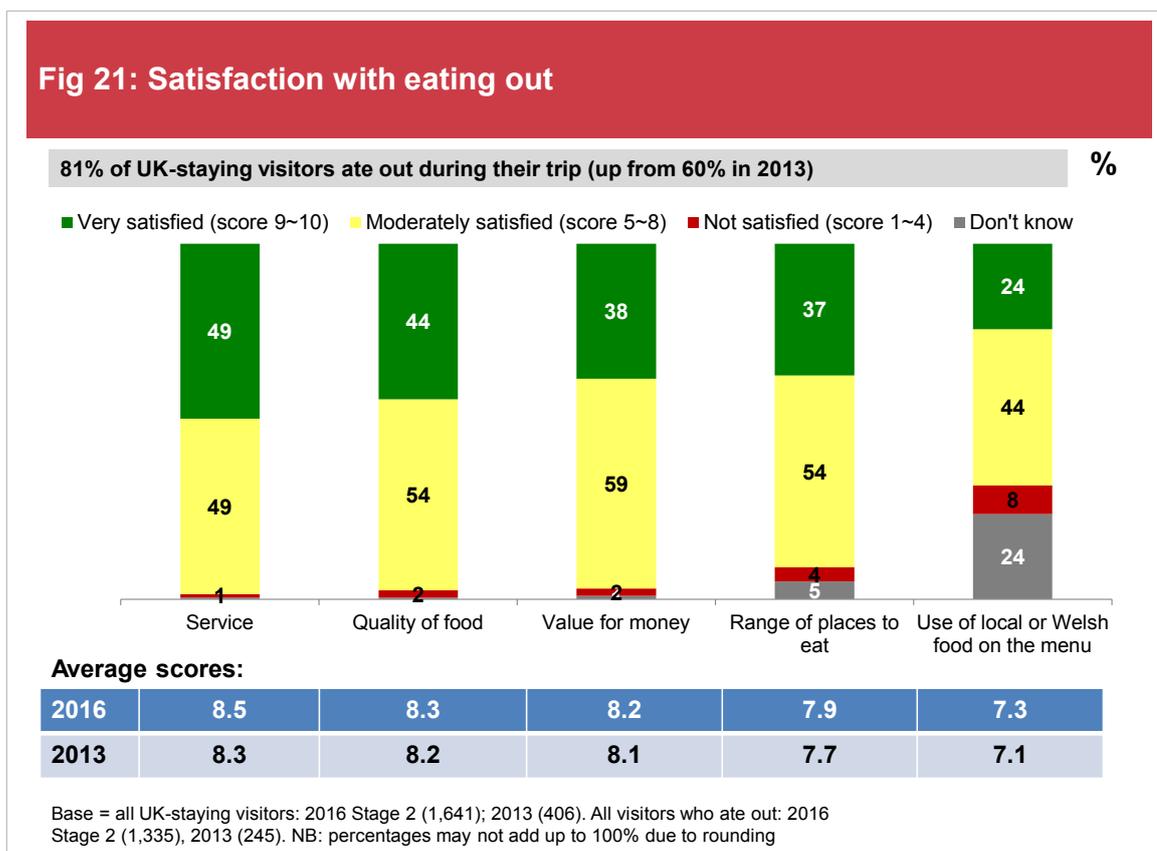
Over 8 in 10 UK staying visitors ate out during their visit to Wales (81%); this is a sizeable increase from the 2013 level (60%).

Satisfaction with various aspects of the eating out experience in Wales varied, with visitor ratings highest for service (49% very satisfied) and lowest for the use of local or Welsh food on the menu (24% very satisfied). On the latter dimension, almost 1 in 10 visitors (8%) were dissatisfied, giving scores of just 1-4, while around a quarter (24%) could not comment.

“It was a really lovely holiday, everyone was welcoming. Local food, something for everyone”

“I was disappointed there weren’t many Welsh food options widely available in hotels, and also some of the pubs we went to. We did find some Welsh dishes but they had to be sought out.”

In contrast to findings for other aspects of the trip, average satisfaction scores for eating out were slightly higher in 2016 than in 2013 – see Figure 21 below.



Satisfaction with eating out also varied across Wales; average scores obtained tended to be higher than the all Wales score in Ceredigion / Cardigan Bay and Llandudno / Colwyn Bay, and lower than average in Carmarthenshire, South Wales Valleys and Swansea Bay. 'Use of local or Welsh food on the menu' scored particularly low in Cardiff, capital of Wales - see Table 23 below.

Table 23: Average scores for eating out by marketing region		Service	Quality of food	Value for money	Range of places to eat	Use of local or Welsh food on the menu
Bases in brackets (NB some very small)						
ALL WALES	(1,335)	8.5	8.3	8.2	7.9	7.3
Cardiff, capital of Wales	(104)	8.4	8.4	8.2	8.6	6.6
Carmarthenshire	(84)	8.1	8.0	8.0	7.8	7.0
Ceredigion / Cardigan Bay	(99)	8.8	8.6	8.4	8.2	7.7
Glamorgan Heritage Coast	(35)	8.5	8.3	8.2	8.2	7.1
Isle of Anglesey	(80)	8.5	8.4	8.0	7.5	7.8
Llandudno and Colwyn Bay	(63)	8.7	8.4	8.3	8.0	7.5
Mid Wales and Brecon Beacons	(134)	8.4	8.3	8.2	7.6	7.2
North East Wales	(87)	8.7	8.5	8.4	7.7	7.6
Pembrokeshire	(93)	8.4	8.3	8.1	8.0	7.9
Snowdonia Mountains and Coast	(213)	8.4	8.2	8.1	7.6	7.5
South Wales Valleys	(84)	8.3	8.1	8.1	7.7	6.9
Swansea Bay	(134)	8.4	8.2	8.1	7.6	7.0
Wye Valley and Vale of Usk	(125)	8.5	8.3	8.2	7.0	7.6

5. Conclusions

- Although the age profile of visitors is skewed towards the 35-54 age group, there has been an increase in the proportion of 16-34s coming to Wales in 2016, with a corresponding decrease in the proportion of older visitors (aged 55+). This could be the result of Visit Wales' marketing of activity tourism and its promotion of activity holidays to younger visitors, intended to generate revenue from additional short breaks into Wales, although in part, this may be influenced by the addition of outdoor activity sites to the interviewing locations (e.g. Bike Park Wales). The increase in younger visitors may also be influenced by the 2016 Year of Adventure campaign, which aimed to inspire target markets to think differently of Wales and to encourage people to consider Wales as an adventure destination – 'Younger 16-34's, no children' showed highest levels of awareness of the campaign. Almost one in three UK staying visitors in 2016 were motivated to visit to take part in outdoor or sporting activities and just over one in ten said this was their main reason for coming to Wales. Moreover, the proportion of staying visitors in 2016 who took part in adventure sports and activities such as mountain biking during their visit has risen sharply from 2013.
- While Wales scores very highly overall among UK staying visitors as a place to visit, the study does highlight some areas where the experience could be enhanced, and differences in opinion across different areas of the country. The cleanliness and availability of public toilets, the quality and availability of public transport and Wales' accessibility for people with a disability are all scored lower than 8 in 10, suggesting there is room for improvement on all these dimensions. What's more, those who were less than enthusiastic about their visit to Wales (the 4% who gave a score of less than 8 out of 10 for Wales overall as a place to visit) would like to see (among other things) more welcoming / friendly people and more vibrant town centres with better shopping on offer.
- Wales performs well on sense of place, with the great majority of UK staying visitors considering that some aspect of their visit included features that were distinctively Welsh or that they could not have found elsewhere (in particular Wales' heritage sites and visitor attractions). Yet while most visitors agree they want an experience from their trip to Wales which is distinct to Wales and that they couldn't get anywhere else, opinions are divided on how important it is to see or hear the Welsh language during their visit; this was more important to overseas visitors than UK visitors.

- The 2016 survey indicates a rise in the proportion of staying visitors eating out during their visit to Wales, possibly linked to the higher proportion of ABC1s visiting and to a buoyant hospitality sector. There are also improvements in visitors' perceptions of Wales' food and drink offer, on the whole. One area where demand is not being met, however, is the provision of local or Welsh food on pub and restaurant menus (especially in Cardiff, capital of Wales region) – this is an area of dissatisfaction for almost one in ten staying visitors who ate out while on holiday in Wales and is also mentioned spontaneously by some visitors as an area for improvement. Featuring more local produce on menus would be welcomed by staying visitors and would enhance the visitor experience to Wales.
- The great majority of UK staying visitors gather information in advance of their trip to Wales, with much of this information gathering being carried out online. Visitors' use of online information channels in planning their trip to Wales has risen sharply over the past three years, underlining the growing importance of clear, accessible online information to help with holiday planning and to provide inspiration to visitors on what to do and see when in Wales.
- Information sources are less important during the trip, however - almost four in ten UK staying visitors do not use any information while on holiday in Wales. Among those who do, while the balance has swung online pre-trip, a sizeable proportion of visitors are still using offline information when on holiday. In particular, leaflets still appear to have a role to play during the trip, being used as a source of information by around one in five staying visitors while on holiday in Wales in 2016. Use of brochures and Tourist Information Centres is also limited pre-trip, however TIC use is higher when in Wales.
- Another clear trend is the growing use of third party booking sites, which has increased sharply since 2013 (at the expense of visitors booking directly with the accommodation provider). This underlines how important it is for accommodation operators in Wales to have a strong presence on such sites going forward.

Appendix I: Detailed list of survey locations

Table 24: 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
	Baumaris 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)
South 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 East Wales	Abergavenny Town Centre	Monmouthshire County Council
	Barry Island Seafront	
	Big Pit National Mining Museum	
	Bike Park Wales	South East Wales Tourism Group
	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	South East Wales Tourism Group
	Dare Valley Country Park	
	Festival Park	South East Wales Tourism Group
	Llancaiach Fawr Manor	
	Millennium Centre / Bay	
	Monmouth Town Centre	Monmouthshire County Council
	National Museum Cardiff	
Newport City Centre		
Penarth Pier	South East Wales Tourism Group	
Porthcawl Promenade		
Rhondda Heritage Park		
Royal Mint Experience	South East Wales Tourism Group	
St Fagans National History Museum		
Tintern Abbey		
Tredegar House		

Table 25: Individual survey locations by region of Wales		
Region	Total number of interviews conducted at Stage 1	Total number of interviews conducted at Stage 2
North Wales	1,448	826
Mid Wales	907	473
South West Wales	1,216	609
South East Wales	3,081	1,556

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

 2 Museum Place, Cardiff CF10 3BG	B01613-1 VISIT WALES VISITOR SURVEY 2016 STAGE 1 (FINAL)	FOR OFFICE USE ONLY	TIME OF INTERVIEW (7) 10.00am – 12pm 1 12.01pm – 2pm 2 2.01pm – 4pm 3 4.01pm – 6pm 4	DAY OF INTERVIEW (8) Weekday 1 Weekend 2 Bank Holiday 3	WEATHER (9) Sunshine 1 Cloud 2 Rain 3 Other 4
<p>APPROACH ADULTS AGED 16+ - READ OUT</p> <p>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?</p> <p>IF NECESSARY, REASSURE NO SELLING INVOLVED AND INTERVIEWS CARRIED OUT IN ACCORDANCE WITH THE MARKET RESEARCH SOCIETY'S CODE OF CONDUCT</p> <p>YES – willing to take part → CONTINUE NO – not willing to take part → THANK AND CLOSE</p>					
<p>S1 Firstly, do you speak Welsh? IF YES (10) is that?</p> <p>Yes – fluently..... 1 → S2 Yes – but not fluently..... 2 → S2 No..... 3 → S3</p>	<p>Q1 (IF STAYING VISITOR S3 – CODES 1 OR 2) How many nights in total will you be staying in Wales? WRITE IN _____ (14-15)</p>				
<p>S2 (IF WELSH SPEAKER) We can conduct this interview in English or Welsh – which would you prefer? (11)</p> <p>English..... 1 Welsh..... 2</p>	<p>Q2 (ASK ALL) And are you visiting today with any pets? (16) CAN MULTI-CODE</p> <p>Yes – dog/s 1 Yes – other pet/s 2 No 3</p>				
<p>S3 (ASK ALL) - SHOWCARD A Which of these best describes the reason for your trip here today? (12)</p> <p>Part of a holiday, staying in Wales away from home..... 1 → Q1 Part of a holiday to visit friends or relatives, staying in Wales away from home..... 2 → Q1 Day visit to / in Wales – for a day trip / outing / non-routine visit..... 3 → S4 Day visit to / in Wales – for routine</p> <p>business or routine shopping..... 4 THANK AND CLOSE On business..... 5 For study..... 6 Other..... 7</p>	<p>Q3 Which country do you live in? (17-20m)</p> <p>Wales..... 1 Netherlands.. 8 England..... 2 Belgium..... 9 Scotland..... 3 Spain..... A Northern Ireland..... 4 Italy..... B Republic of Ireland... 5 USA..... C France..... 6 Canada..... D Germany..... 7 Australia..... E</p> <p>Europe other (specify) _____ Outside Europe other (specify) _____</p>				
<p>S4 (IF DAY VISITOR S3 – CODE 3) 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? (13)</p> <p>Yes..... 1 → Q2 No..... 2 → CLOSE</p>	<p>CHECK QUOTAS AND CONTINUE</p> <p>Q4 (IF LIVE IN WALES) In which local authority area do you live? (21)</p> <p>Anglesey..... 1 Merthyr Tydfil... C Blaenau Gwent.... 2 Monmouthshire. D Bridgend..... 3 Neath Port Talbot E Caerphilly..... 4 Newport..... F Cardiff..... 5 Pembrokeshire... G Ceredigion..... 6 Powys..... H Carmarthenshire.. 7 Rhondda Cynon Taf I Conwy..... 8 Swansea..... J Denbighshire..... 9 Torfaen..... K Flintshire..... A Vale of Glamorgan.. L Gwynedd..... B Wrexham..... M</p>				

<p>Q5 (IF LIVE OUTSIDE OF WALES) Is this your first visit to Wales? (22)</p> <p>Yes..... 1 No..... 2 Don't know / can't remember..... 3</p>	<p>Q11 Marital status (33)</p> <p>Married or equivalent..... 1 Single, never married..... 2 Widowed, divorced or separated..... 3</p>				
<p>Q6 (IF LIVE IN WALES) Is this your first visit to this part of Wales? (23)</p> <p>Yes..... 1 No..... 2 Don't know / can't remember..... 3</p>	<p>Q12 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 No..... 2</p>				
<p>Q7 (ASK ALL) – SHOWCARD B Which of the following best describes your party on this visit? (24) SINGLE CODE</p> <p>Visiting alone..... 1 A couple..... 2 Family – with young children..... 3 Family – with older children..... 4 Family – with young and older children..... 5 Family – without children..... 6 Friends..... 7 Organised group / society..... 8 Other..... 9</p>	<p>Q13 Working status (36)</p> <p>Working full time (30+ hrs per week)..... 1 Working part time (> 29 hrs per week).... 2 Full time education..... 3 Retired..... 4 Looking after the home..... 5 Full time carer..... 6 In training..... 7 Other..... 8</p>				
<p>Q8 How many people are in your visitor party today, including yourself? WRITE IN NO. OF ADULTS & CHILDREN</p> <table border="1" data-bbox="116 1126 707 1220"> <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>Q14 Status in household (37) READ OUT - The Chief Income Earner 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 Other adult (aged 16+)..... 2</p>
ADULTS	CHILDREN				
<p>Q9 Gender (31)</p> <p>Male..... 1 Female..... 2</p>	<p>Q15 Occupation of Chief Income Earner (last job if retired)</p> <p>Actual job _____ Position / grade _____</p>				
<p>Q10 Age (32)</p> <p>16-19..... 1 55-64..... 6 20-24..... 2 65-74..... 7 25-34..... 3 75-84..... 8 35-44..... 4 85+..... 9 45-54..... 5 Refused..... A</p>	<p>Q16 Social grade (38)</p> <p>AB..... 1 C1..... 2 C2..... 3 DE..... 4</p>				

<p>SHOWCARD C</p> <p>Q17 What is your ethnic group? (39)</p> <p>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</p>	<p>SHOWCARD E (44-47m)</p> <p>Q19 Have you seen or heard any of these types of advertising, marketing and publicity for Wales before your visit today?</p> <p>CAN MULTI-CODE</p> <p>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</p>
<p>SHOWCARD D</p> <p>Q18 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)</p> <p>CAN MULTI-CODE</p> <p>A Mobility impairment (wheelchair user)..... 1 B Mobility impairment (non-wheelchair user)..... 2 C Blind..... 3 D Partially sighted..... 4 E Deaf..... 5 F Partial hearing loss..... 6 G Learning difficulties..... 7 H Long-term illness (e.g. AIDS, arthritis, cancer, diabetes)..... 8 None of these 9</p>	

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
REMIND 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:

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

WRITE IN YOUR INTERVIEWER NUMBER →	(53)	(54)	(55)	(56)
---	------	------	------	------

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

Appendix III: Stage 2 survey questionnaire (telephone interviews)

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

	Q9	Q10
	Column A	Column 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 (specify arrival airport) _____		
Other (please specify how and where arrived) _____		
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 | 15. Newport |
| 2. Blaenau Gwent | 16. Pembrokeshire |
| 3. Bridgend | 17. Powys |
| 4. Caerphilly | 18. Rhondda Cynon Taff |
| 5. Cardiff | 19. Swansea |
| 6. Ceredigion | 20. Torfaen |
| 7. Carmarthenshire | 21. Vale of Glamorgan |
| 8. Conwy | 22. Wrexham |
| 9. Denbighshire | 23. Various |
| 10. Flintshire | |
| 11. Gwynedd | |
| 12. Merthyr Tydfil | |
| 13. Monmouthshire | |
| 14. Neath Port Talbot | |

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

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

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**

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.