

Wales Visitor Survey 2019

UK Day Visitors



Llywodraeth Cymru
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Analysis for Policy

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Wales Visitor Survey 2019 - UK Day Visitors

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

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1. Introduction/Background

Introduction

- 1.1 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)¹, Great Britain Day Visits Survey (GBDVS)² and International Passenger Surveys (IPS)³ are conducted annually with data presented monthly or quarterly.
- 1.2 While these studies generate the official statistics on the volume and value of tourism and also provide useful information 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.
- 1.3 It is also clear that visitor information pre- and during trip is changing in light of the wealth of digital information 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.

The need for research

- 1.4 Visit Wales therefore commissioned the latest in a series of visitor surveys in 2019, to update findings from 2016 and earlier years and to track any changes in the profile, attitudes and satisfaction of visitors.
- 1.5 As in previous years, three categories of visitor were covered: UK day visitors, UK staying visitors and overseas visitors.
- 1.6 The results from the research will be used to provide benchmarks for Visit Wales' development and marketing strategies.

¹ [GB Tourist 2019 report \(PDF, 2.8MB\)](#)

² [GB Day Visitor Survey 2019 \(PDF, 5MB\)](#)

³ [International Passenger Survey 2019 Summary Report](#)

1.7 For the first time, an additional phase of qualitative research was conducted in 2019 to supplement the main visitor survey.

Objectives

1.8 Key objectives for the 2019 visitor survey were as follows:

- To profile visitors to Wales (by demographics, age, lifecycle, party size, gender and previous experience of visiting Wales, and by Visit Wales existing market segments for UK and International travellers)
- To analyse visitors' motivations for choosing Wales, such as perceptions, past experiences, proximity, etc.
- To assess details about the current trip (e.g. location, activities undertaken, transport used to and within Wales, accommodation stayed in)
- To 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
- To compare pre-visit expectations and attitudes to the actual experience
- To investigate factors such as future intentions to visit and likelihood of recommending Wales
- To profile information used in visit planning, in particular the use of digital information sources
- To investigate the role of tourism and tourism-related activities in facilitating the Welsh Government's Health and Wellbeing agenda.

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

2. Methodology

Overview of approach

2.1 The core research took a two-stage approach:

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 Annex A.

Stage 2: Follow-up telephone interview

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 post-visit feedback 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 Annex B.

2.2 A third stage of exploratory qualitative research was also conducted as part of the 2019 project. Its aim was to add richness to the quantitative survey with examples of visitor experiences in Wales and ensure the visitor's voice is heard in more depth.

2.3 The 2019 survey methodology replicated the approach taken in the 2016 survey, which represented a change from earlier years⁴.

Stage 1: Face-to-face survey

2.4 A total of 7,683 interviews were conducted with visitors aged 16 and over at 70 tourism locations across Wales. A full breakdown of all locations included in the research can be found at Annex C.

⁴ In 2016 the survey was redesigned – the length of Stage 1 interviews was shortened to focus on capturing profile data from a large sample of visitors during their trip/visit; at the same time, Stage 2 interviews (post-visit) were lengthened to enable us to collect detailed information on activities, experience and satisfaction with the trip as a whole.

- 2.5 The number of interviews achieved with each of the three target audiences in 2019 was as follows:
- UK day visitors: 3,951 interviews
 - UK staying visitors: 3,103 interviews
 - Overseas visitors: 629 interviews
- 2.6 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
 - Part of a holiday to visit friends or relatives, **staying in Wales** away from home
 - On a **non-routine day visit** in / to Wales and spending **three hours or more** away from home / their accommodation (including travel).
- 2.7 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.
- 2.8 Quotas were set by region in Wales⁵ and visitor type. Regional quotas were proportionate and ensured the profile of the sample was representative of all visitors to Wales in terms of geographic penetration. Since UK day visitors account for the bulk of visitors to Wales, quotas on visitor type were bigger for UK staying visitors and overseas visitors, to ensure an adequate representation from each of the three audiences. At analysis, data was weighted by region to fine tune any imbalances between the sample and the regional profile of visitors.
- 2.9 Stage 1 fieldwork took place between 4 May and 31 October 2019. All visitors were offered the choice of conducting the interview in Welsh or English: 129 Welsh language interviews were carried out.

⁵ **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

Stage 2: Telephone interviews

- 2.10 A total of 3,909 interviews were conducted by telephone at Stage 2 with visitors who had taken part in Stage 1 (representing a 50.9% conversion overall.)
- 2.11 The number of interviews achieved with each of the three audiences was as follows:
- UK day visitors: 2,007 interviews
 - UK staying visitors: 1,642 interviews
 - Overseas visitors: 260 interviews
- 2.12 Interviews were conducted using CATI (Computer Aided Telephone Interviewing) from Beaufort's in-house telephone research unit. Quotas were again set on type of visitor, to ensure a robust sample of interviews was achieved with each of the three target audiences. Data was weighted by region at the analysis stage to fine tune any imbalances and ensure the survey sample was representative in terms of regional visitor penetration.
- 2.13 Fieldwork for Stage 2 took place between 17 June and 22 November 2019. Interviewing was staggered so that at least two weeks elapsed between Stage 1 and Stage 2 interviews, to allow sufficient time for UK staying and overseas visitors to return home after their trip to Wales.
- 2.14 All Welsh speaking visitors (established at Stage 1) were offered the choice of participating in Welsh or English: 26 Welsh language interviews were conducted.

Stage 3: Qualitative phase

- 2.15 The qualitative element focused on staying visitors to Wales so is covered in the UK staying and Overseas visitor reports.
- 2.16 A separate report is also available on the qualitative phase⁶.

Partner buy-in

- 2.17 Local Authorities, Tourism Partnerships and Tourism Organisations across Wales were offered the opportunity to opt in to the 2019 Visitor Survey, commissioning either:
- Interviews at additional sampling points (not included in the core Visit Wales locations) 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 report focusing on their area.
- 2.18 A total of 16 partners bought in to the research, adding an extra 13 interviewing locations to the 57 core Visit Wales locations. Details of partner buy-in interviewing locations can be found at Annex C.

Report analysis

- 2.19 Results from the 2019 survey are analysed in a number of ways in the report, including:
- Over time (comparing 2019 results with 2016 and 2013, where available)
 - By the time of the year the trip was taken (peak months vs. shoulder months⁷)
 - By Visit Wales UK marketing segmentation⁸

⁶ <https://gov.wales/wales-visitor-survey-2019>

⁷ Defined as follows: Peak – June, July and August; Shoulder – May, September and October

⁸ Segments are derived from a combination of age, life-stage and social grade as follows:

1 – Post-family group, 35-54, no children

2 – Post-family group, 55+, no children

3 – Travelling with children, any age, ABC1

4 – Travelling with children, any age, C2DE

5 – Younger, 16-34, no children

- By Welsh region visited.

- 2.20 In addition, results are provided by Visit Wales marketing region⁹ for selected key measures at Annex E.
- 2.21 The full data tabulations for the survey provide results broken down by a wide range of variables.
- 2.22 As with UK staying visitors and overseas visitors, supplementary multivariate analysis¹⁰ of the data was carried out. This aimed to examine and identify trends and associations between variables, where the relationships are influences on satisfaction, re-visiting and recommendation. No strong attitudinal drivers were identified for UK day visitors for satisfaction, re-visiting or recommendation, so the findings have not been included in this report.

⁹ There are 13 Visit Wales marketing regions: Cardiff, capital of Wales; South Wales Valleys; Wye Valley and Vale of Usk; Glamorgan Heritage Coast; Carmarthen; Pembrokeshire; Swansea Bay; Ceredigion/ Cardigan Bay; Mid Wales and Brecon Beacons; Isle of Anglesey; North East Wales; Snowdonia Mountains and Coast; Llandudno and Colwyn Bay

¹⁰ See Annex D for an explanation

3. Findings

Profile of UK day visitors

- 3.1 Over three quarters (78%) of UK day visitors to Wales in 2019 came from Wales. England accounted for 22% of UK day visitors (down from 32% in 2016), while less than 1% came from other parts of the UK – nearly all from Northern Ireland, with a very small number from Scotland (see Table 3.1).
- 3.2 The profile of UK day visitors in Wales is older and more affluent in terms of socioeconomic grade than that of the UK population generally. A quarter (24%) of UK day visitors in 2019 were aged between 16 to 34 years (compared with 31% of UK adults¹¹ in this age range), while around four in ten (39%) were aged between 35 to 54 years (compared with 32% of UK adults). The remaining 38% were aged over 55.
- 3.3 The age profile of UK day visitors in 2019 is similar to 2016 but younger than 2013. The age profile of UK day visitors was similar in both the peak and shoulder months.
- 3.4 Almost seven in ten (69%) UK day visitors in Wales in 2019 fell into the ABC1 social grades¹², compared with 55% of the UK population¹³. There were a higher proportion of ABC1 day visitors from the UK during the shoulder months than in the peak period (at 72% compared with 68% respectively). Visitors from the C2DE social grades accounted for almost a third of day visitors overall in 2019 (31%) but their proportion fell to 27% in the shoulder period.

¹¹ Source: ONS 2018 Mid-Year Population Estimates UK -

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland>

¹² Social grade is a classification system based on occupation developed for use on the National Readership Survey (NRS). 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

¹³ Source: NRS 2016 www.nrs.co.uk/nrs-print/lifestyle-and-classification-data/social-grade/

- 3.5 Women accounted for 61% of UK day visitors in 2019. Women make up 51% of the UK population¹⁴.
- 3.6 Around a fifth (21%) of UK day visitors in 2019 spoke Welsh – 10% fluently. The proportion of fluent and non-fluent Welsh speakers has increased from the previous wave (21% c. 16% in 2016). The proportion of Welsh speakers rose to 26% among day visitors from Wales, with equal proportions of fluent and non-fluent Welsh speakers (13% for each).
- 3.7 As in earlier years, Black, Asian and Minority Ethnic visitors accounted for a very small proportion of UK day visitors in Wales in 2019 (3%).

Table 3.1: Profile of UK day visitors

%	Trends over time			Peak vs shoulder 2019	
	2019	2016	2013	Peak	Shoulder
Visitor origin					
Wales	78	68	78	78	77
England	22	32	22	21	23
Scotland/NI	<1	<1	N/A	<1	-
Age					
16 - 34	24	23	19	24	25
35 - 54	39	39	35	39	39
55+ years	38	39	45	38	36
Gender					
Male	39	44	N/A	40	38
Female	61	56	N/A	60	62
Social grade					
ABC1	69	65	64	68	72
C2DE	31	34	36	33	27
Welsh speaking					
Yes – fluently	10	8	N/A	11	9
Yes – Not fluently	11	8	N/A	11	10
No	79	83	N/A	78	81
Ethnicity					
White	97	96	97	97	97
Non-white/other	3	4	3	3	3

Base: all UK day visitors; 2019 - Stage I: 3,951; 2016 - Stage I: 2,959; 2013 - 1,310

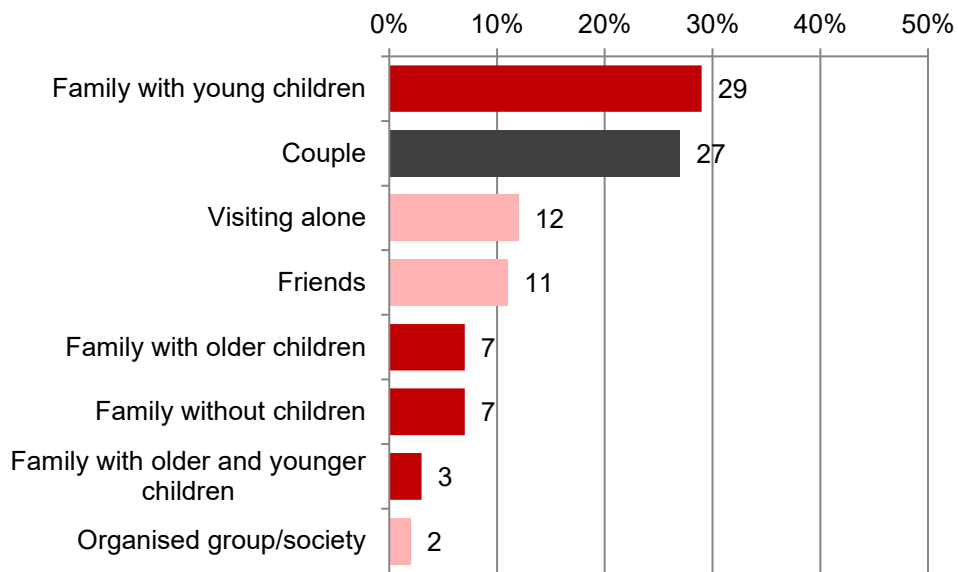
Table notes: N/A = not captured in 2013; figures in red indicate a change over time or a marked difference between peak and shoulder season visitors

¹⁴ Source: ONS 2018 Mid-Year Population Estimates UK. The higher proportion of women in the visitor survey sample may be influenced by a greater willingness among female members of a party to take part in the survey.

- 3.8 The proportion of UK day visitors bringing pets whilst on day trips in Wales has increased in 2019 (14% up from 8%). Day visitors in North Wales were more likely to be accompanied by a pet than those visiting other areas of Wales (18% cf. 14% on average).
- 3.9 At Stage 2, all day visitors were asked to rate how pet-friendly they found Wales to be by giving a score from 1 to 10 (where 1 is very dissatisfied and 10 is very satisfied). Over six in ten (63%) of those travelling with pets gave Wales a score of 9 or 10, with another 34% scoring it 5 to 8 and 1% rating Wales 4 or lower on this dimension.
- 3.10 Turning to visitor groups, 13% of UK day visitor groups in 2019 included someone with a disability: 6% had a mobility impairment, 5% a long-term illness, 3% a hearing impairment, 2% had learning difficulties and 1% a sight impairment. This is similar to the incidence among the UK population (estimated at 12%¹⁵).
- 3.11 When asked how satisfied they were with Wales' accessibility for people with a disability or long-term illness, satisfaction among this group was relatively low. A third (32%) of those on day trips in Wales with someone with a disability within their party gave a very satisfied score (9 or 10). Most (43%) gave a moderately satisfied score (between 5 to 8) while 7% gave a score of 4 or below (the remainder did not answer).
- 3.12 Wales mainly attracted families and couples on day trips in 2019, as in previous years. However, the proportion of families with young children taking day trips in Wales is declining – it now stands at 29%, compared with 33% in 2016. Families accounted for almost half (46%) of UK day visitors in 2019, similar to 2016 (48%), while over a quarter of day visitors were couples (27%) - see Figure 3.1.

¹⁵ Department for Work and Pensions Disability Prevalence Estimates, 2011-12 (derived from the Family Resources Survey)
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/321594/disability-prevalence.pdf

Figure 3.1: Type of parties visiting Wales 2019

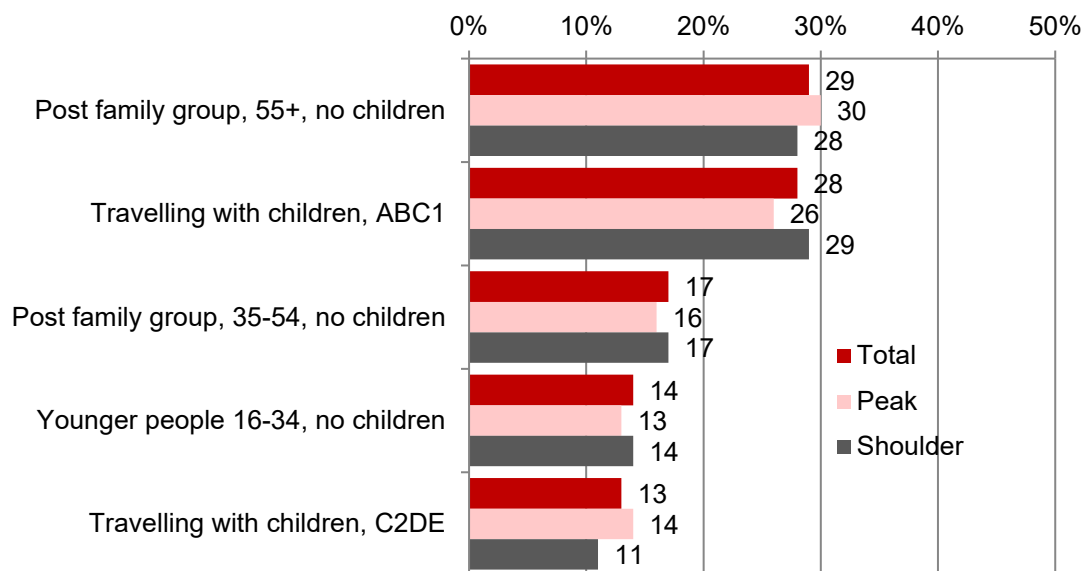


Base: 2019 Wales Visitor Survey – all UK day visitors Stage I (3,951)

- 3.13 Day visitors from the rest of the UK were more likely to visit Wales as couples (35% cf. 25% from Wales), whereas families with young children were more likely to come from Wales (31% from Wales and 25% from the rest of the UK).
- 3.14 The average party size among UK day visitors in 2019 has decreased slightly to 3.6, down from 3.8 in 2016. This is largely the result of a decrease in the average number of children per party (now 0.9, down from 1.1 in 2016). The average number of adults per party has remained fairly consistent (2.8 cf. 2.7 in 2016). As in 2016, party sizes for day visitor groups from England in 2019 were slightly larger than those from Wales (at 4.1 for England compared with 3.5 for Wales). Day tripper groups during the shoulder period were smaller than those during the peak summer months (at 3.2 compared with 3.9). Apart from organised groups/societies, families with children represented the largest visitor groups (averaging 4.2 people per party).
- 3.15 UK day visitors have been classified into five groups, according to the Visit Wales UK marketing segmentation. Reflecting the age and social grade profile of visitors, almost three in ten UK day visitors in 2019 were *Post family group, 55+, no children* (29%) and a further three in ten were *Travelling with children, ABC1* (28%). This was also the case in 2016 (at 30% and 27%

respectively). All other segments accounted for much smaller proportions of day visitors (see Figure 3.2).

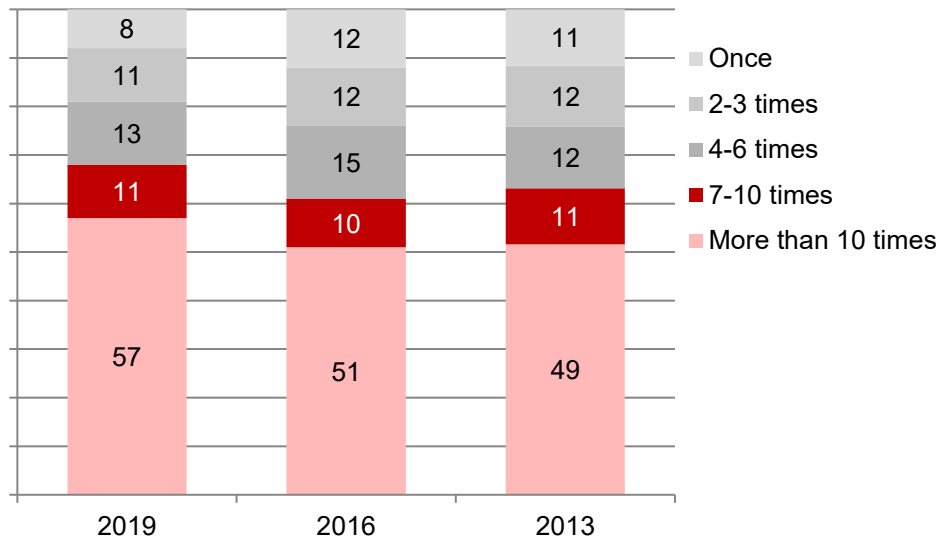
Figure 3.2: Breakdown of UK day visitors 2019 by Visit Wales segmentation, total and peak / shoulder periods



Base: 2019 Wales Visitor Survey – all UK day visitors Stage I (3,951)

- 3.16 Day visitors from England were slightly more likely to fall into the *Younger people, 16-34, no children* and *Post family group, 35-54, no children* segments than day visitors from Wales. In contrast, Wales day visitors were more likely to belong to the *Post family group, 55+, no children* and the two segments *travelling with children (ABC1 and C2DE)*.
- 3.17 Levels of repeat day trips in/to Wales in 2019 were very high and higher than in previous years; over nine in ten (92%) UK day visitors had taken a day trip in/to Wales twice or more during the past year. Almost six in ten (57%) were very frequent day visitors, having made ten or more day trips in/to Wales during the last year (see Figure 3.3).
- 3.18 Almost one in four UK day visitors from England (24%) were on their first day trip to Wales when interviewed in 2019 – this has remained the same as the 2016 level (24%).
- 3.19 Day visitors to North Wales were considerably more likely to be visiting for the first time than those in other regions of Wales (15% cf. 3% for West Wales and 7% for both Mid and South Wales).

Figure 3.3: Frequency of day trips in/to Wales in the last year, over time - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

- 3.20 Day visitors from Wales were more likely to be repeat visitors than day visitors from the rest of UK – 96% of the former had taken two or more day trips in Wales during the last year, compared with around three quarters (76%) of the latter.
- 3.21 No real difference was evident in frequency of visiting between peak and shoulder season visitors.

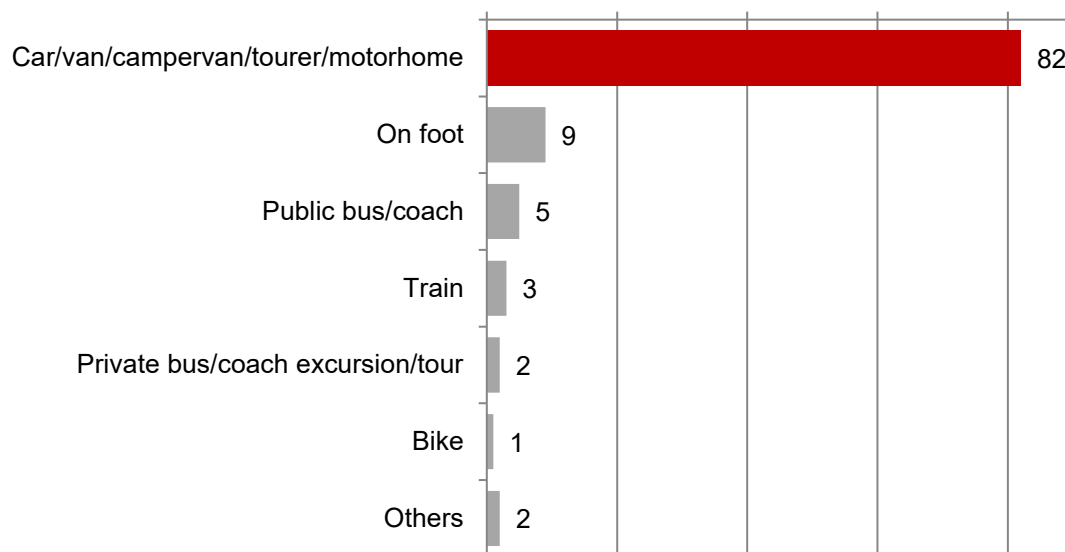
Profile of trips taken by UK day visitors

- 3.22 As in previous waves of the visitor survey, the majority of UK day visitors travelled to their day trip destination by car, van, campervan, tourer or motorhome (82% cf. 84% in 2016). Only small proportions of visitors used other methods of transport: 9% on foot, 5% public bus or coach, 3% train, 2% private bus/coach excursion/tour and 1% on a bike. Those on day trips in West Wales were least likely to have used public transport to reach their destination – only 3% said they had used a public bus or coach and none had used the train, therefore use of cars or campervans was especially high (91%).
- 3.23 *Travelling with children, ABC1* and *Travelling with children, C2DE* segments were most likely to travel to the site they were interviewed by car or

campervan (at 92% and 87% respectively), while *Younger people, 16-34, no children* were most likely to use public transport (8% public bus/coach and 5% train).

3.24 Fewer than one in ten UK day visitors used public transport to get to their day trip destination (8% - 5% bus and 3% train) while a similar proportion either walked or cycled (10%).

Figure 3.4: Method of transport used to get to day trip destination, 2019 - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

Note: percentages may not add to 100% (more than one response is possible / data is rounded)

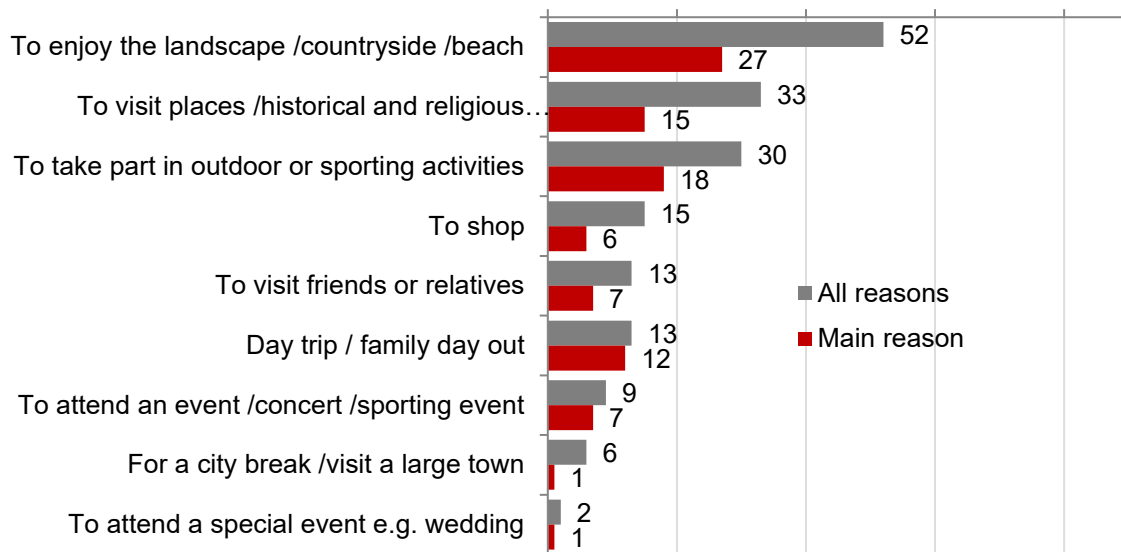
Motivations for visiting Wales

3.25 UK day visitors were asked which of a list of possible reasons for visiting the part of Wales they were interviewed in applied to them. They could choose as many or as few reasons as they wished.

3.26 The most popular motivations for coming to that area of Wales were to **enjoy the country’s natural landscape** (mentioned by over half of visitors), to **visit particular places, historical and religious sites or attractions** (mentioned by a third of visitors) and to **take part in outdoor or sporting activities** (mentioned by three in ten). Around one in six (15%) came to **shop**, while a further 13% came to **visit friends / relatives** or **for a family day out** (see Figure 3.5).

3.27 While the pattern of results in 2019 is similar to previous waves, there has been a decline in the proportion of day visitors coming to visit particular places or historical and religious sites (33% down from 51%). At the same time, the proportion on a day visit to take part in outdoor or sporting activities continues to increase (30% up from 25% in 2016).

Figure 3.5: Prompted reasons for visiting that area of Wales 2019 - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

Note: percentages may not add to 100% (more than one response is possible / data is rounded)

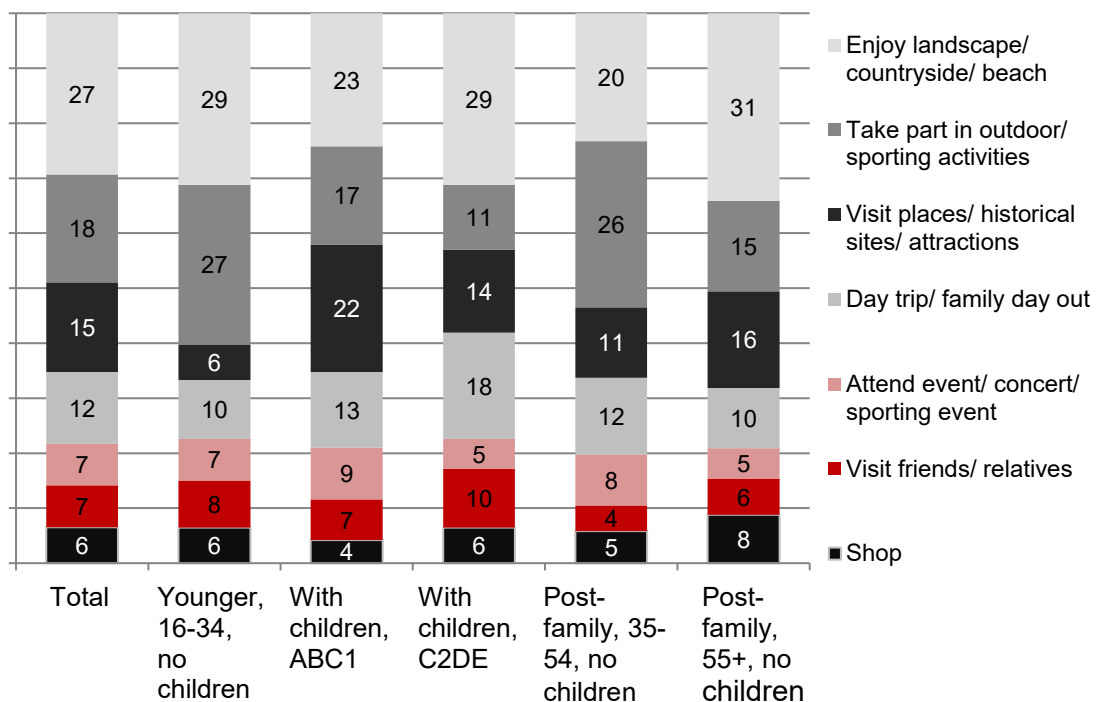
3.28 Overall, the single **main** reason for visiting that part of Wales was to **enjoy the landscape/countryside/beach** – given by over a quarter (27%) of UK day visitors. This was more likely to be mentioned by visitors during the peak summer months than shoulder month visitors (at 30% compared with 22% respectively).

3.29 In contrast, visiting their chosen area of Wales to **take part in outdoor or sporting activities** (the next most popular main reason) was mentioned by more shoulder period visitors than peak period visitors (at 20% compared with 16%). This was also much more likely to be the main reason for visiting Wales among the *Younger people, 16-34, no children* marketing segment than any other group.

3.30 While enjoying the landscape and natural environment of Wales was important across all marketing segments, the primary reasons for visiting that

part of Wales sometimes differed between marketing segments – *Younger people, 16-34, no children* and *Post family 35-54 group, no children* were most likely of all groups to visit to take part in outdoor or sporting activities (27% and 26% respectively); *Travelling with children, ABC1* were most likely to come to visit places, historical or religious sites or attractions (see Figure 3.6).

Figure 3.6: Main prompted reason for visiting that part of Wales 2019, by marketing segment - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

- 3.31 Day visitors were also questioned about which other factors attracted them to take a day trip in Wales. They were read out a list and asked which of these factors, if any, had influenced them to choose that area of Wales for their day trip.
- 3.32 Over eight in ten (81%) said they were attracted to that location because it was **easy to get to**, while around two-thirds (65%) said they hoped their day trip would **help them relax and escape the stresses of life**. Around half of visitors had **visited before and wanted to return** or wanted to **visit a**

particular attraction/place (mentioned by 52% and 47% of UK day visitors respectively) (see Figure 3.7).

Figure 3.7: Prompted factors that attracted day visitors to that part of Wales 2019 - %

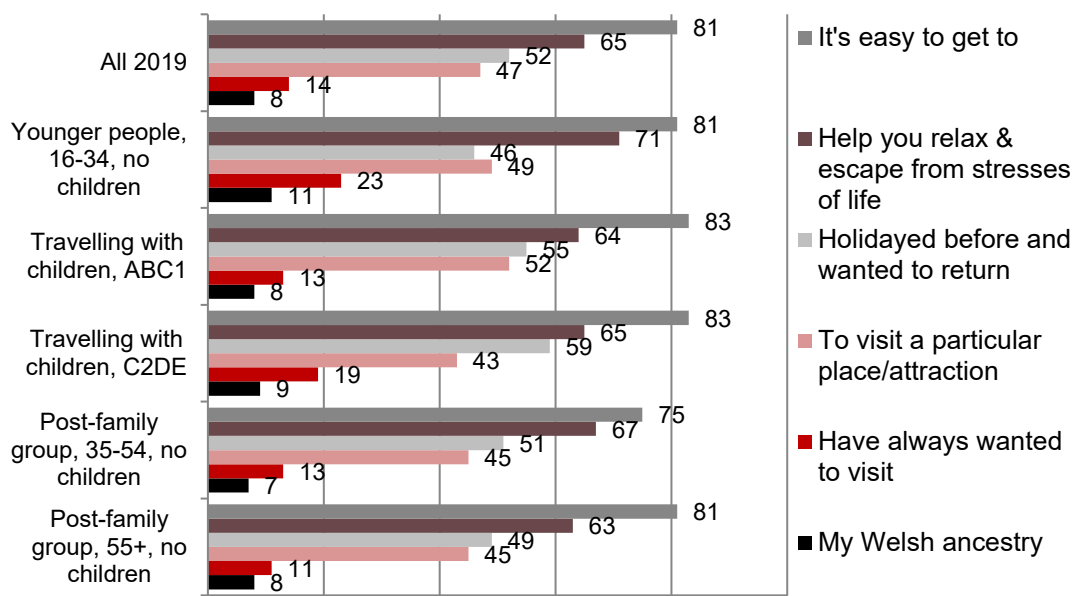


Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

Note: percentages may not add to 100% (more than one response is possible / data is rounded)

3.33 *Younger people, 16-34, no children* were most likely of all the marketing segments to say that they were attracted to that location by wanting to relax and escape the stresses of life; the *Travelling with children, C2DE* segment was most likely to mention they had holidayed there before and wanted to return (see Figure 3.8).

Figure 3.8: Prompted factors that attracted visitors to Wales, by marketing segment - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

Note: percentages may not add to 100% (more than one response is possible / data is rounded)

Activities undertaken while in Wales

- 3.34 Visitors who said they came to that area of Wales for particular reasons were asked about which related activities they had undertaken during their trip.
- 3.35 Over half of UK day visitors (52%) gave **enjoying the landscape/countryside/beach** as a reason for visiting that part of Wales. Of these visitors, four in ten (40%) had visited a country park/forest park and over a third (35%) had visited a beach for their day trip. Over a fifth visited a garden or did some wildlife watching (23% and 22% respectively) – the latter has almost doubled since 2016 (12%). A further 19% had visited a wildlife attraction/nature reserve.
- 3.36 Those visiting during the shoulder months were considerably more likely to visit a country park/forest than those taking a day trip during peak-time (49% c.f. 34% respectively), while those visiting during the peak period were more likely to visit the beach than those visiting during shoulder months (37% c.f. 31%).

- 3.37 Awards for quality and cleanliness, such as the Blue Flag Award, Green Coast Award and Seaside Award, were considered important when choosing a beach to visit by 74% of those who had taken a day trip to a beach in Wales.
- 3.38 A third (33%) of UK day visitors said they had come to that part of Wales to **visit places/historical or religious sites/specific attractions or to go sightseeing**. Of these, over half (54%) had done some general sightseeing, up from 47% in 2016 and highest among peak day visitors (at 58%). Over a third (37%) had visited a castle or other historic attraction during their trip, while over a quarter (28%) had visited a museum or heritage centre (down from 34% in 2016) or a nature-based attraction (26%, up from 22% in 2016).
- 3.39 Three in ten (30%) came to their chosen location in Wales to **take part in outdoor or sporting activities**. Of this group, the most popular activity undertaken was walking – 56% had walked over 2 miles and another 25% had walked less than 2 miles. One in ten had been mountain biking and cycling (10% for both). Both activities were down slightly from 2016 (13% and 12% respectively). Mountain biking was more commonly undertaken by shoulder period visitors than peak period visitors.
- 3.40 Around one in ten (9%) said they had taken a day visit in Wales to **attend an event/concert/performance or sporting event**. One in four of this group had attended a sporting event during their visit, while around one in ten had been to a food/drink festival or theatre or cinema performance (13% and 11% respectively) - see Table 3.2.

Table 3.2: Main activities undertaken in Wales

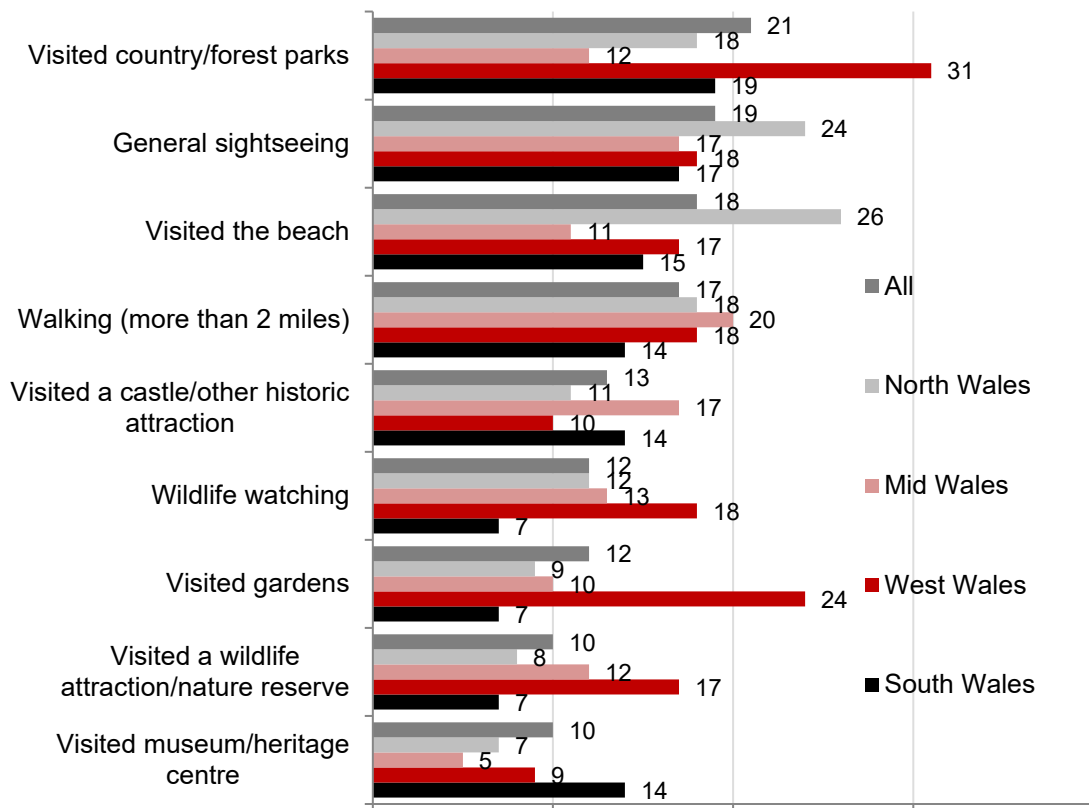
%	Trends over time			Peak vs shoulder 2019	
	2019	2016	2013	Peak	Shoulder
To enjoy the landscape/countryside/beach (base: all who came to enjoy landscape/countryside/beach – 965)					
Visited country parks/forest parks	40	38	43	34	49
Visited the beach	35	36	32	37	31
Visited gardens	23	25	6	24	21
Wildlife watching	22	12	4	23	21
Visited a wildlife attraction/nature reserve	19	16	N/A	17	21
To visit places/historical and religious sites/attractions (base: all who came to visit places/historical and religious sites /attraction – 991)					
General sightseeing	54	47	19	58	47
Castle or other historic attraction	37	42	41	34	40
Museum or heritage centre	28	34	26	25	32
Nature-based attraction (e.g. gardens)	26	22	9	28	24
Religious site (e.g. cathedral)	12	10	4	13	10
Animal-based attraction (e.g. zoo)	10	10	4	12	7
Art gallery or exhibition	10	9	5	12	7
Industrial heritage attraction	10	12	16	10	9
Scenic/steam/historic railway	8	8	7	10	6
To take part in outdoor or sporting activities (base: all who came to take part in outdoor or sporting activities – 584)					
Walking (more than 2 miles)	56	52	40	56	55
Walking (less than 2 miles)	25	25	41	23	27
Mountain biking	10	13	7	7	14
Cycling	10	12	11	10	9
Adventure sports	7	6	<1	9	5
Swimming (indoor & outdoor)	6	7	N/A	9	3
To attend an event/concert/performance/sporting event (base: all who came to attend an event/concert/performance/sporting event – 200)					
Sporting event	25	13	3	29	17
Food and drink festival	13	14	N/A	9	20
Theatre or cinema performance	11	11	5	7	19
Arts/cultural festival/Eisteddfod	8	28	43	9	8
Live concert	8	14	11	5	14

Base: all UK day visitors; 2019 –Stage II: 2,007; 2016 – Stage II: 1,504; 2013 –1,310

Table notes: Main activities = those carried out by at least 10% of each sub-group; N/A = not captured in 2013; figures in red indicate a change over time or a marked difference between peak and shoulder season visitors

- 3.41 When looking at the total sample of UK day visitors, the most popular activities overall were visiting a country park/ forest and general sightseeing (see Figure 3.9).
- 3.42 Clear regional differences are evident in the types of places visited and activities undertaken during day visits, reflecting the mix of attractions available across Wales and the interviewing locations, to a certain extent.
- 3.43 Just over a fifth (21%) of UK day visitors overall visited a country park/forest park in Wales during their day trip; day visitors in West Wales were most likely to have done so, while visitors to Mid Wales were least likely. Just under a fifth (19%) of UK day visitors had done some sightseeing during their trip; this was highest in North Wales (24%).
- 3.44 The next most popular activities overall for UK day visitors in Wales were visiting a beach and walking more than 2 miles (each carried out by almost one in six on their trip). Visiting a beach was most popular amongst visitors to North Wales but participation in walking was relatively consistent across all regions of Wales.
- 3.45 Over one in ten visited a castle/other historic attraction, did some wildlife watching or visited a garden (at 13%, 12% and 12% respectively). Visitors in Mid Wales were most likely to have visited castles or other historic attractions, while visitors in West Wales were more likely to have done some wildlife watching or visited a garden during their day trip (the National Botanic Garden of Wales was one of the interviewing locations in West Wales).

Figure 3.9: Activities undertaken/places visited in Wales on day visit, by region (based on the total sample of day visitors) - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

Note: percentages may not add to 100% (more than one response is possible / data is rounded)

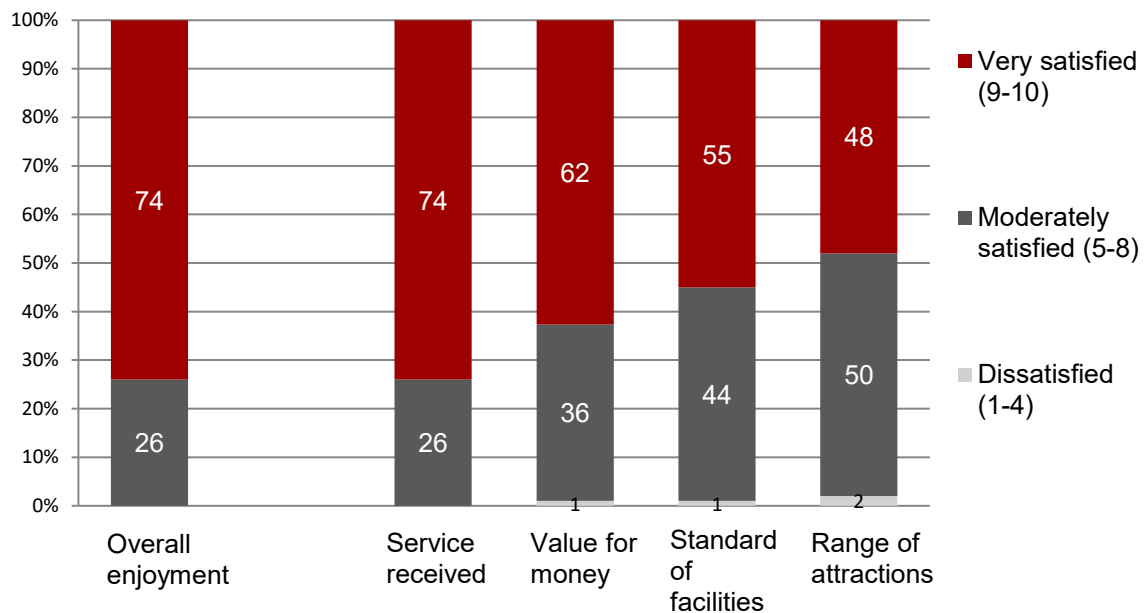
Perceptions of attractions visited

3.46 UK visitors who had visited an attraction in Wales during their day trip were asked how satisfied they were with various aspects of attractions in Wales (using a scale of 1 to 10). Generally, satisfaction was very high, with three quarters (74%) giving a score of 9 or 10 for their **overall enjoyment of the attractions** visited (see Figure 3.10).

3.47 The **service** received at the attractions visited was also rated particularly highly by visitors, with three quarters giving a score of 9 or 10. Slightly lower scores were given for attractions' **value for money**, the **standard of facilities** and the **range of attractions** available, with very satisfied scores ranging from 62% to 48% on each of these dimensions and higher proportions giving moderately satisfied scores of between 5 to 8.

3.48 Very few visitors to attractions gave scores lower than 5 on any dimension.

Figure 3.10: Satisfaction with attractions visited in Wales 2019



Base: 2019 Wales Visitor Survey – UK day visitors Stage II who visited attractions during their stay (881)

3.49 Overall, average satisfaction ratings for all dimensions were slightly higher in 2019 than in 2016. No major differences were evident in satisfaction with attractions between peak and shoulder period day visitors.

Eating out

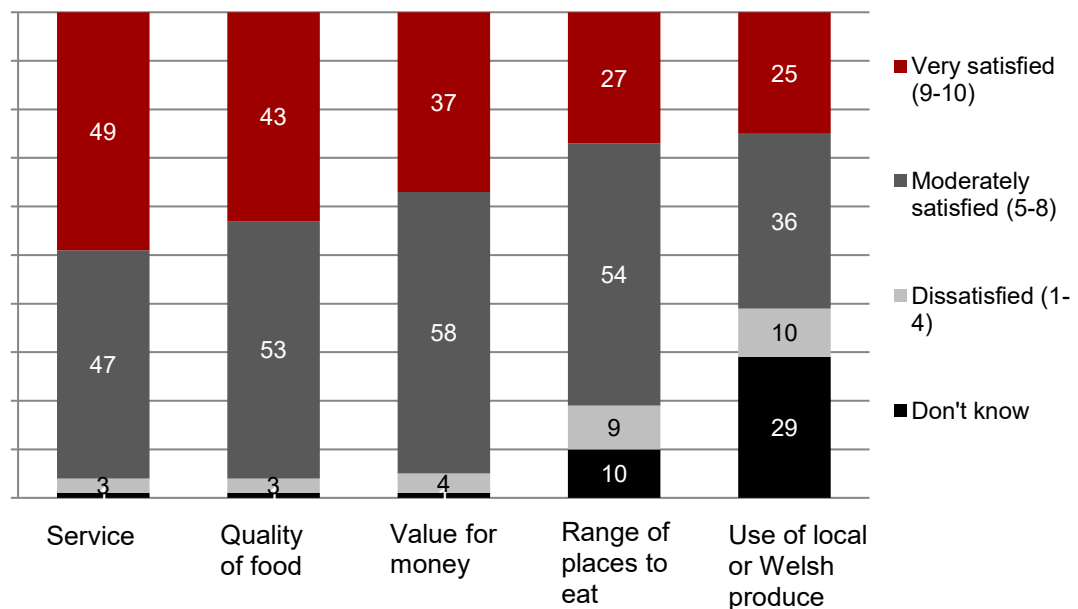
3.50 Six in ten UK day visitors (59%) ate out during their day trip in Wales (comparable to 2016 – 60%). Those least likely to eat out were the *Travelling with children, C2DE* marketing segment (at 50%).

3.51 Visitors' rating of Wales for its eating out experience was lower than for its attractions. The proportion of those eating out during their visit who were very satisfied on different dimensions ranged from just under half (for the **service** provided) down to just over one in four (for the **use of Welsh and local produce on menus**). (see Figure 3.11).

3.52 While dissatisfaction with any dimension was low, it was highest for the range of places to eat and the use of local or Welsh produce (at 9% and 10%

respectively). A sizable minority were unable to comment on these aspects, however (10% and 29% respectively).

Figure 3.11: Satisfaction with eating out in Wales 2019 - %



Base: 2019 Wales Visitor Survey – UK day visitors Stage II who ate out during their visit (1,369)

3.53 Satisfaction with most aspects of eating out in Wales has remained relatively consistent since 2016. The proportion of UK day visitors very satisfied with the use of local or Welsh produce has increased from 21% to 25%, however, while those very satisfied with the range of places to eat has fallen back (from 30% to 27%).

Table 3.3: Satisfaction with eating out, 2019 c.f. 2016

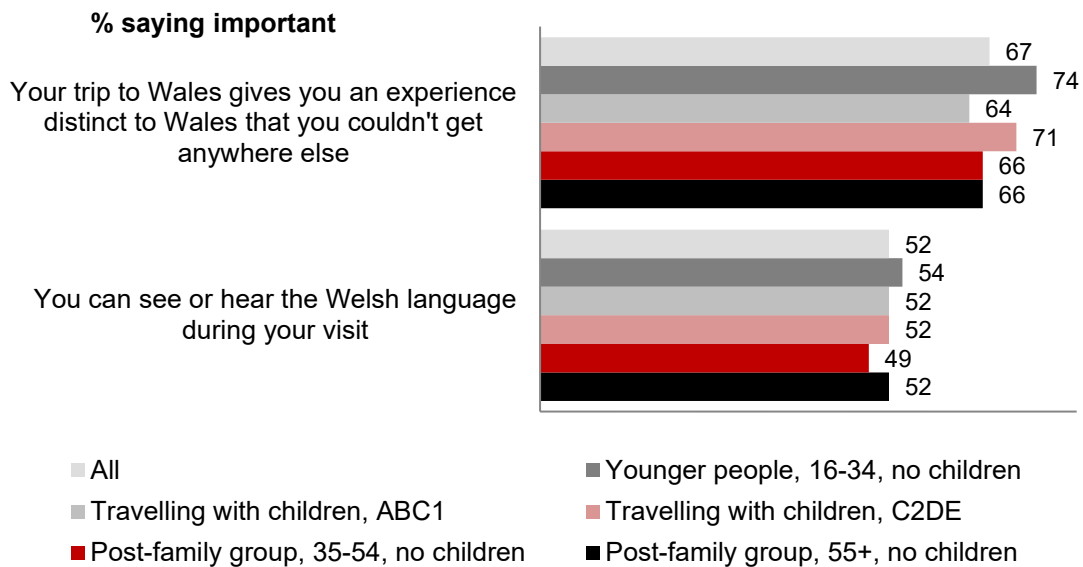
% 'very satisfied'	Trends over time	
	2019	2016
Service	49	47
Quality of food	43	41
Value for money	37	35
Range of places to eat	27	30
Use of local or Welsh produce	25	21

Base: Wales Visitor Survey – UK day visitors Stage II (2019 – 1,369; 2016 – 1,504)
Table notes: Very satisfied: scoring 9 or 10/10; 1 = very dissatisfied; 10 = very satisfied

Sustainability and sense of place

- 3.54 Over nine in ten UK day visitors (93%) consider Wales to be a sustainable tourism destination for holidays and breaks, with most visitors overall (69%) strongly agreeing that it is. This represents a marked increase from the levels seen in previous years (with 41% strongly agreeing in 2016 and 35% in 2016). The *Post-family group, 55+, no children* segment was most likely to agree strongly.
- 3.55 When prompted with a list and asked whether their day trip in Wales included any of these aspects that were distinctively Welsh or had a particular local character, over six in ten UK day visitors (62%) were able to single out something that was distinctively Welsh about their trip. Only 38% could not. As in 2016, **heritage sites** and **visitor attractions** were most often mentioned (in 2019 by 31% and 30% of visitors each), followed by **food and drink** (selected by 24%) and **outdoor activities** (16%).
- 3.56 The majority of UK day visitors were looking for an experience in Wales that they could not have anywhere else – 67% regarded it as important that their trip in Wales was distinctively Welsh, while only 29% did not.
- 3.57 Sense of place was most important to the *Younger people, 16-34, no children* and the *Travelling with children, C2DE* segments. In contrast, it was least important to the *Travelling with children, ABC1* group (see Figure 3.12).
- 3.58 At the same time, UK day visitors' opinions were split on the importance of being able to see or hear the Welsh language during their visit to Wales - 52% regarded it as important, while 47% did not. Visitors from Wales were more likely to feel it was important than visitors from England or other UK countries (54% cf. 44% of those from the rest of the UK).
- 3.59 The *Younger people, 16-34, no children* segment was most likely to want to hear the Welsh language during their visit, but overall there was little difference between the groups.

Figure 3.12: Importance of distinctive elements of visit 2019, by marketing segment

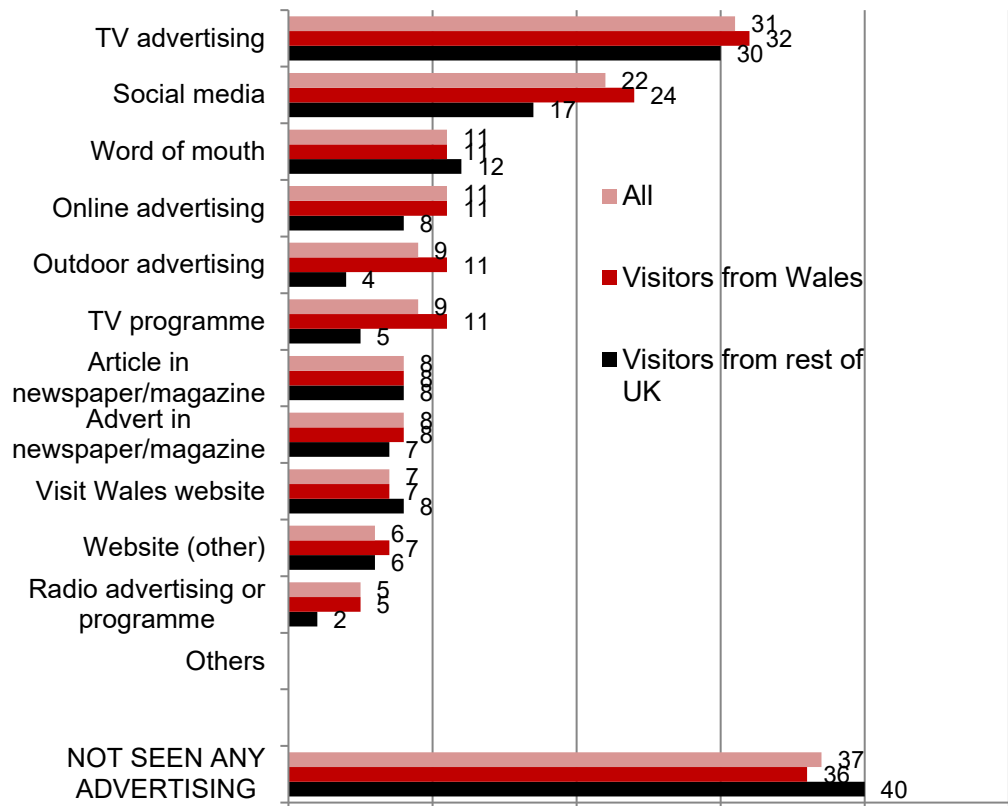


Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2.007)

Marketing recall and holiday planning

- 3.60 Over six in ten UK day visitors in 2019 (63%) had seen some advertising, marketing or communications about Wales before their trip, down from 69% in 2016 (see Figure 3.13).
- 3.61 The most commonly-recalled channel was TV advertising (mentioned by 31% of UK day visitors overall). This has fallen from a level of 43% in 2016. Social media communications (e.g. Facebook and Twitter) were recalled by 22%, while 11% remembered seeing online advertising. The former has increased since 2016 (at 17%). 11% had heard Wales mentioned or recommended by other people. Mentions of the Visit Wales website are down from 2016 (now 7%, down from 13% in 2016).
- 3.62 Day visitors from Wales were more likely than day visitors from other UK countries to have seen almost all of these types of marketing, particularly social media, outdoor advertising, TV programmes and online advertising.

Figure 3.13: Prompted recall of advertising, marketing and publicity for Wales pre-visit, by visitor origin - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage 1 (3,951)

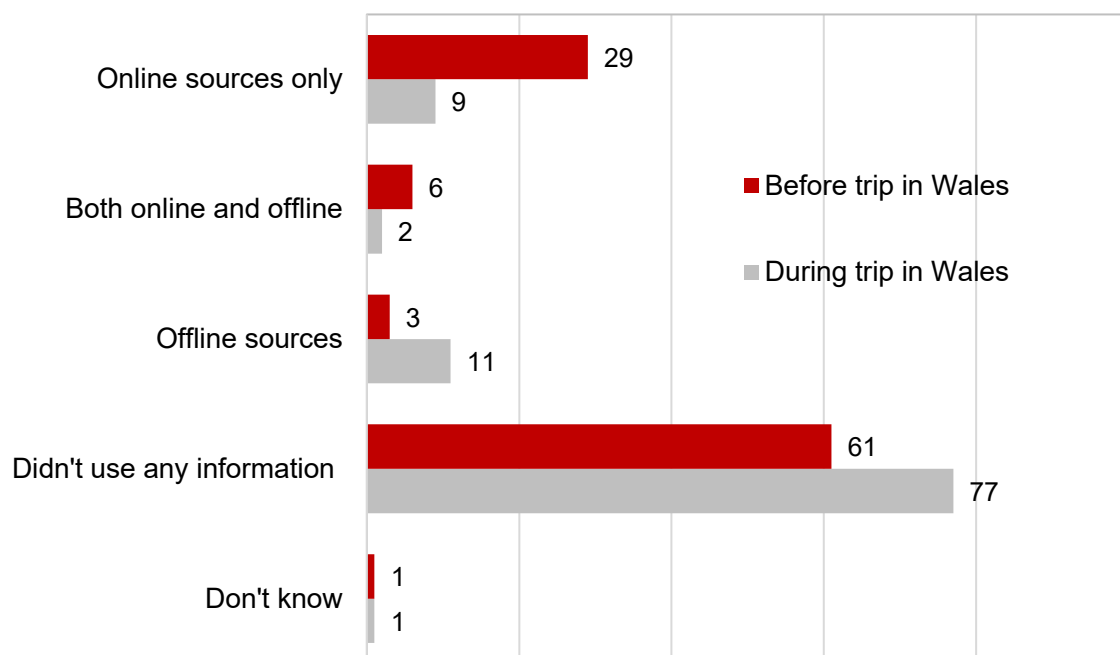
Note: percentages may not add to 100% (more than one response is possible / data is rounded)

- 3.63 7% of UK day visitors had heard of ‘The Wales Way’ campaign. Awareness was highest among those aged 55 to 64 and those visiting North Wales (at 11% each). Among those aware, the majority said it had made no difference to their decision to visit Wales, but it did influence the decision of 7% of those who had seen it. This equates to fewer than 1% of UK day visitors overall.
- 3.64 12% of UK day visitors had seen advertising, marketing or publicity for ‘Year of Discovery 2019’, rising to 15% of visitors who went on day trips in North Wales. While it had made no or little difference to their decision to visit for almost three quarters of those aware, it had influenced a quarter of those who had seen it to some extent (or 1% of UK day visitors overall).
- 3.65 Four in ten UK day visitors (39%) used some information sources to help plan their day trip in Wales: three in ten visitors (29%) only used online sources such as websites and apps when information gathering (slightly

lower than the level in 2016 – 32%), while another 6% used both online sources and offline sources such as brochures and leaflets (down from 13% in 2016). 3% of visitors only used offline sources of information in 2019 pre-visit (down from 7% in 2016) (see Figure 3.14).

3.66 Information use was lower during their day trip. Just under a quarter of UK day visitors (23%) consulted some information sources during their day visit - 77% did not. Among those who did, almost one in ten (9%) only used online sources of information (10% in 2016), while 2% used both online and offline information (down from 5% in 2016). 11% only used offline sources (down from 13% in 2016).

Figure 3.14: Day trip planning: information sources used before and during trip to Wales 2019 - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

3.67 Websites were used for planning their trip to Wales by the majority of online information users in 2019 (88%). Another 16% said they used social media and 8% used apps, while 4% used email. Social media was most likely to be mentioned by the *Travelling with children* segments, both ABC1 and C2DE.

3.68 Search engines such as Google were most commonly-mentioned for planning their trip (mentioned by around half of online users – 49%). Around one in eight (13%) mentioned accommodation booking sites (such as

LateRooms.com, Expedia, Booking.com and Airbnb) and 11% mentioned the Visit Wales website and the specific attraction's website.

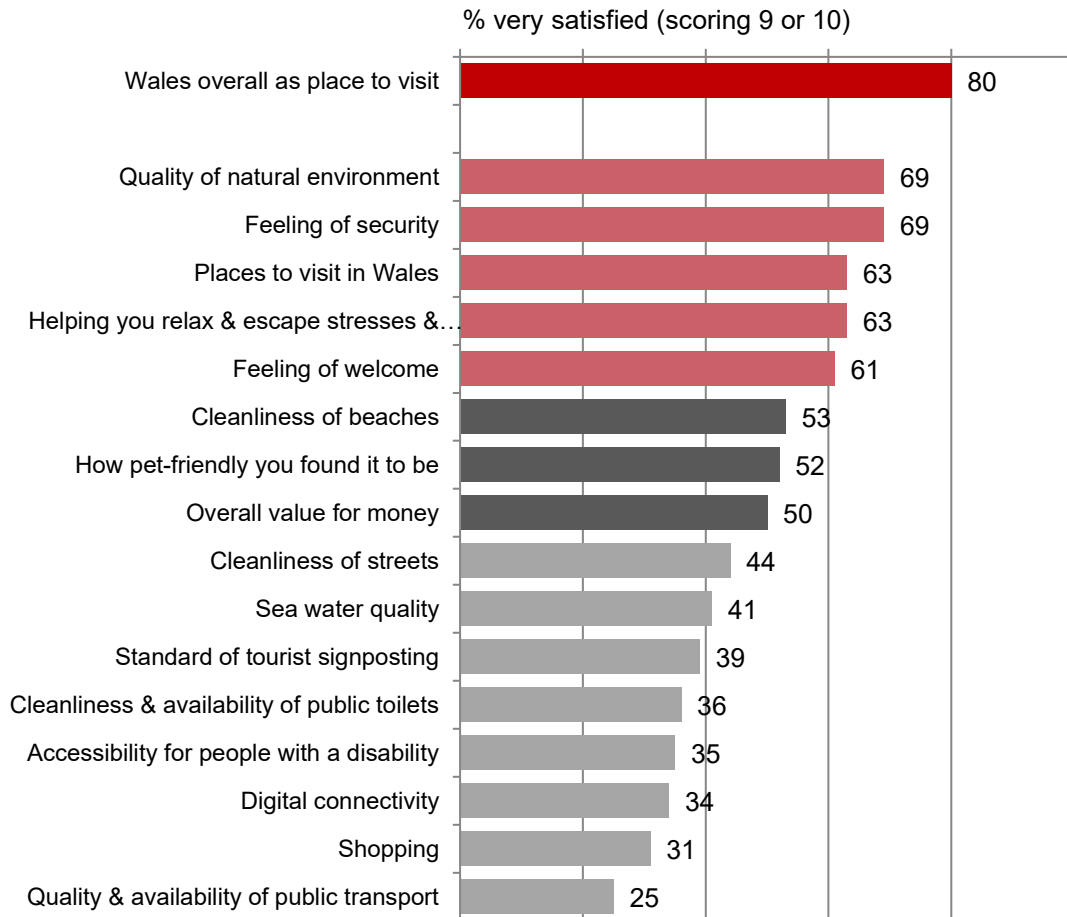
- 3.69 Google and search engines also dominated when visitors were asked what they had used for information gathering during their day trip (mentioned by 45% of those who had used online information sources). The Visit Wales website was used by 7% of UK day visitors during their trip.

Satisfaction with overall visit experience

- 3.70 Eight in ten (80%) of UK day visitors in 2019 were very satisfied with **Wales overall as a place to visit**. The average satisfaction score of 9.3 is unchanged from previous years. No major differences were evident in the satisfaction levels of peak vs shoulder period visitors, by demographics or by marketing segment.
- 3.71 As in previous years satisfaction was highest with the **quality of the natural environment in Wales** and **feeling of security** (with 69% very satisfied with each). Other dimensions of the visitor experience which scored particularly highly were the **places to visit in Wales, helping you relax from the stresses and strains of life** and the **feeling of welcome**. All were rated a 9 or 10 by at least six in ten of UK day visitors who expressed a view in 2019.
- 3.72 While satisfaction was generally high, satisfaction was lowest with Wales' **quality and availability of public transport, shopping, digital connectivity, accessibility for people with a disability, the cleanliness and availability of public toilets** and the **standard of tourist signposting**. Between 25% and 39% of visitors expressing an opinion were very satisfied with Wales on any of these dimensions.
- 3.73 The highest dissatisfaction was evident for the **quality and availability of public transport**, with 22% of UK day visitors expressing an opinion dissatisfied with this aspect of their visit (that is, scoring it between 1 to 4 out of 10).

3.74 Figure 3.15 illustrates UK day visitors' satisfaction with Wales on all dimensions and is rebased to exclude those who could not give an answer (that is, saying 'Don't know' or 'Not applicable').

Figure 3.15: Satisfaction with visit to Wales 2019



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007); rebased to exclude those answering 'Don't know' and 'Not applicable' to each dimension

Note: percentages may not add to 100% (more than one response is possible / data is rounded)

3.75 The minority of day visitors who rated Wales 7 out of 10 or lower as a place to visit (5%) were asked what would have improved their experience or encouraged them to give Wales a higher score, apart from the weather.

3.76 Town centre environments and litter/cleanliness were the most-mentioned factors, each cited spontaneously by 10% of these visitors. Other suggestions included more advertising of what's on (mentioned by 9%), better toilet facilities (9%), more activities, especially in poor weather and for children (8%), better restaurants/eating places (8%) and improvements to the transport infrastructure (7%).

3.77 Some comments from less satisfied UK day visitors include:

Town centre needs to be improved.

Generally, litter everywhere - walking paths and on the streets. Fly tipping is an issue especially.

The cleanliness of the public places was not very good. There is rubbish in areas that should be cleaned by the Council, especially the pier.

It's almost a hidden country. I've spent a lot of time in England and we don't push Wales enough as a place to go. You have to make people more aware of it.

Have more publicity and advertisements regarding each attraction in Wales.

Public toilet availability. They seem to be closing them all over the place.

I think there are a lot of things to see but not a lot of things to do.

I think the trains could have more carriages in peak time, if there's two carriages after a day out you feel like sardines, it's a health and safety risk.

Public transport in North West Wales needs improving.

Restaurant closed early so didn't eat out.

Availability of places to eat. More variety needed. Signposting needs to be better and clearer when driving there as I found it confusing.

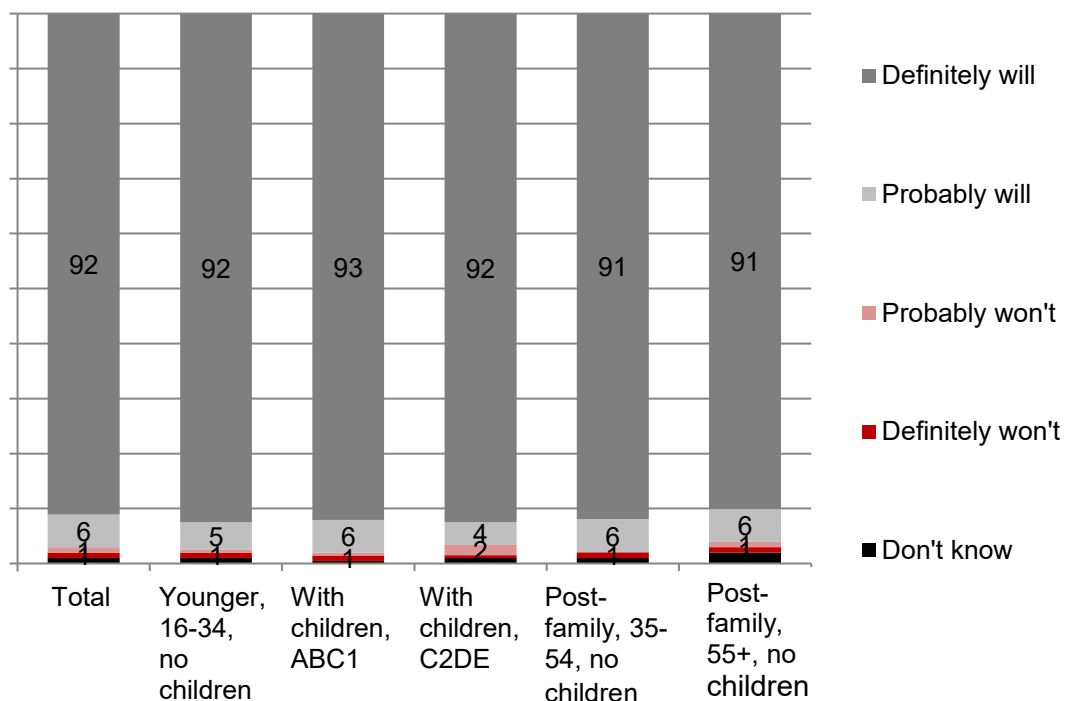
3.78 Reflecting the generally high overall satisfaction levels among UK day visitors, the day trip in Wales exceeded expectations for almost four in ten visitors (39%). This is slightly lower than in 2016 (44%) but higher than in 2013 (36%). For almost six in ten visitors in 2019 (58%), the trip met their expectations. Only 2% of those interviewed said their trip in Wales was worse than expected.

3.79 New visitors and the *Younger people 16-34, no children* segment were most likely to say their day trip was better than expected (at 67% and 58% respectively, compared with 39% overall).

Likelihood of coming back and of recommending Wales

- 3.80 98% of UK day visitors said they were likely to make another visit to/in Wales in the next few years, with 92% overall saying they would definitely do so. Only 1% said they would probably or definitely not re-visit. The proportion of day visitors saying they will definitely make another visit has risen since 2016 (88%).
- 3.81 The proportion of new visitors likely to make another day visit was similar to the proportion of repeat visitors (at 97% compared with 98% respectively). However, the proportion of repeat visitors who said they would definitely do so was higher (at 93% c.f. 84% of new visitors).
- 3.82 There were no significant differences among marketing segments (see Figure 3.16).

Figure 3.16: Likelihood of making another visit to/in Wales 2019, by marketing segment - %



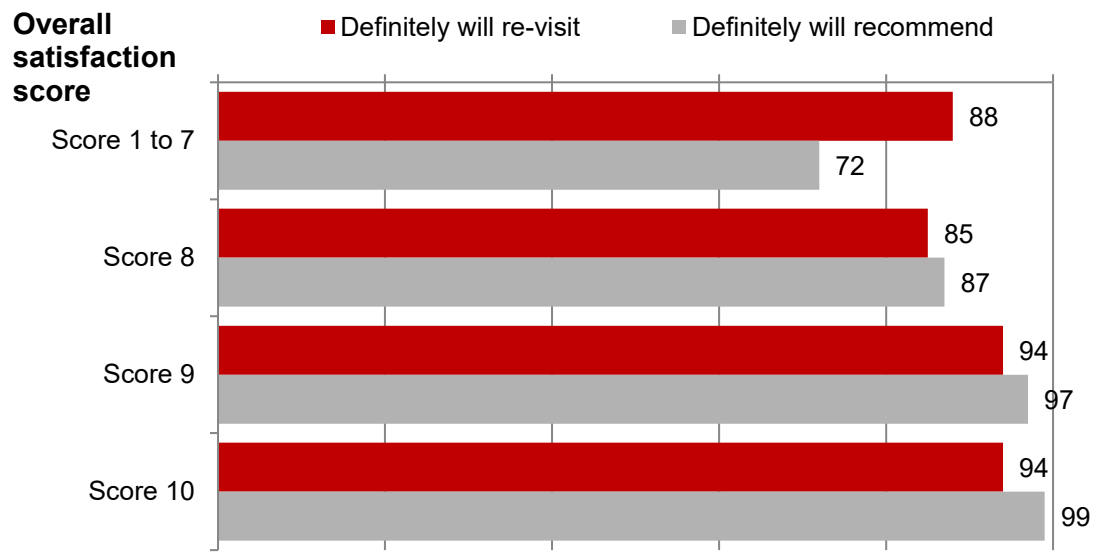
Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

- 3.83 Day visitors were also asked (for the first time) how likely they were to come to Wales for a leisure break or holiday in the next few years. Almost nine in

ten visitors (87%) said they would probably or definitely do so (18% probably and 69% definitely). There was no real differences between day visitors from Wales and those from the rest of the UK on this dimension.

- 3.84 *Younger people, 16-34, no children* were the most likely of all marketing segments to say they would return for a leisure break or holiday (at 93% compared with 87% overall), while *Post family group, 55+, no children*, were the least likely (at 82%).
- 3.85 Reflecting the high levels of visitor satisfaction and the strong likelihood of returning to Wales in future, almost all UK day visitors (99%) said they would recommend Wales as a place to visit to a friend or relative; virtually all of these would definitely recommend Wales (95%). This is equal to the level of definite recommendation seen in 2016.
- 3.86 Recommendation was very high across all visitor types, demographics and marketing segments.
- 3.87 There is a clear relationship between overall satisfaction and likelihood of re-visiting and recommendation; the proportion of UK day visitors likely to make another visit to/in Wales and the proportion likely to recommend Wales increases as overall visitor satisfaction increases (see Figure 3.17).

Figure 3.17: Overall satisfaction and likelihood of re-visiting / recommending Wales 2019 - %



Base: 2019 Wales Visitor Survey – all UK day visitors Stage II (2,007)

4. Conclusions

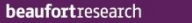
- 4.1 Unlike the situation with UK staying visitors, the majority of UK day visitors come from Wales and the proportion from England has fallen back to its 2013 level. It is perhaps not surprising that most day visitors to Wales are local, since being easy to get to is the main factor that attracts visitors to the part of Wales chosen for their day trip.
- 4.2 While the age profile of UK day visitors remains older than that of the UK population, Wales is attracting more 16-34s now than in the past and the profile for day visitors is younger than that of UK staying visitors.
- 4.3 UK day visitors in 2019 had on the whole seen less advertising, marketing and publicity about Wales before their visit (in particular, TV advertising) than in previous years. Awareness of marketing or communications for Wales was generally lower among day visitors from the rest of the UK than among Welsh-based visitors.
- 4.4 Willingness to come back to Wales for a leisure break or holiday in future was very high among day visitors – almost nine in ten visitors from both Wales and the rest of the UK said they were likely to do so. There are therefore opportunities to market Wales as a short break or staying holiday destination to day visitors.
- 4.5 While UK day visitors are much less likely than UK staying visitors to use any information sources to plan their trip either before or during their visit, use of digital information also dominates among day visitors for visit planning. At the same time, use of offline sources is higher than use of online sources during the trip. This suggests that more traditional printed materials such as leaflets and brochures are still important marketing tools for day visitors.
- 4.6 Although Wales is seen as a sustainable tourist destination by UK day visitors, use of private vehicles dominates when travelling to day trip destinations, even though most day visitors themselves live in Wales. However, this might be out of necessity (especially in more rural areas such as West Wales), as the quality and availability of public transport scored

lowest of all dimensions measured among day visitors - just one in four of those who expressed an opinion were very satisfied with it.

- 4.7 While Wales is rated very highly overall by UK day visitors as a place to visit, the study highlights some areas where the visitor experience could be enhanced. Areas where visitor satisfaction is relatively low (in addition to public transport, mentioned above) are shopping, digital connectivity, accessibility for people with a disability and the cleanliness and availability of public toilets. All of these (except digital connectivity – added in 2019) have been identified as issues in previous surveys.
- 4.8 Spontaneous suggestions for improvement made by the very small proportion of day visitors less than very satisfied with Wales overall as a place to visit also picked up on some of these prompted areas. Other key suggestions made by UK day visitors for improving the visitor experience were improvements to town centre environments, less litter/cleaner streets, more information on what's on, more activities (especially for children) and better restaurants/eating places.
- 4.9 Around one in ten UK day visitors who had eaten out during their trip were dissatisfied with the range of places to eat in Wales and the lack of local or Welsh produce on menus. In fact, satisfaction with the eating experience in Wales among day visitors was generally lower than it was with attractions in Wales (as was the case with staying visitors).
- 4.10 Improving wellbeing was a strong motivating factor for taking a day trip in Wales. Around two-thirds of day visitors in 2019 (65%) said they hoped their day trip would help them relax and escape the stresses of life and this was especially important to *Younger people, 16-34, no children*. This emphasises the importance of tourism in facilitating the Welsh Government's Health and Wellbeing agenda.

Annex A

Stage 1 questionnaire

 2 Museum Place, Cardiff CF10 3BG	B01919-1	MONTH OF INTERVIEW	TIME OF INTERVIEW (7)	DAY OF INTERVIEW (8)	WEATHER (9)
	VISIT WALES	April	10.00am – 12pm	Weekday	Sunshine
VISITOR SURVEY 2019	May	12.01pm – 2pm	Weekend	Cloud	
STAGE 1 (FINAL)	June	2.01pm – 4pm	Bank Holiday	Rain	
	July	4.01pm – 6pm		Other	
	August				
	Sept				
	Oct				
		(CODED VIA SNAP)	(CODED VIA SNAP)		

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

Before we start, please take a look at this card [summary of Privacy Notice] – can I just check that you are willing to participate in this survey?

YES – willing to take part → **CONTINUE**

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

<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 How many nights in total will you be staying in Wales? WRITE IN</p> <p>_____ (14-15)</p>																						
<p>(IF WELSH SPEAKER)</p> <p>S2 We can conduct this interview in (11) English or Welsh – which would you prefer?</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>(ASK ALL) - SHOWCARD A</p> <p>S3 Which of these best describes the (12) reason for your trip here today?</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 business or routine shopping..... 4 THANK AND CLOSE On business..... 5 AND CLOSE For study..... 6 CLOSE Other..... 7</p>	<p>Q3 Which country do you live in? (17-20m)</p> <table style="width: 100%; border: none;"> <tr> <td>Wales..... 1</td> <td>Netherlands.. 8</td> </tr> <tr> <td>England..... 2</td> <td>Belgium..... 9</td> </tr> <tr> <td>Scotland..... 3</td> <td>Spain..... A</td> </tr> <tr> <td>Northern Ireland..... 4</td> <td>Italy..... B</td> </tr> <tr> <td>Republic of Ireland... 5</td> <td>USA..... C</td> </tr> <tr> <td>France..... 6</td> <td>Canada..... D</td> </tr> <tr> <td>Germany..... 7</td> <td>Australia..... E</td> </tr> </table> <p>Europe other (specify) _____ Outside Europe other (specify) _____</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								
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Republic of Ireland... 5	USA..... C																						
France..... 6	Canada..... D																						
Germany..... 7	Australia..... E																						
<p>(IF DAY VISITOR S3 – CODE 3)</p> <p>S4 Can I just check, will you be spending (13) three hours or more away from home or your accommodation as part of your visit today – including travel?</p> <p>Yes..... 1 → Q2 No..... 2 → CLOSE</p>	<p>CHECK QUOTAS AND CONTINUE</p> <p>(IF LIVE IN WALES)</p> <p>Q4 In which local authority area do you live? (21)</p> <table style="width: 100%; border: none;"> <tr> <td>Anglesey..... 1</td> <td>Merthyr Tydfil... C</td> </tr> <tr> <td>Blaenau Gwent... 2</td> <td>Monmouthshire. D</td> </tr> <tr> <td>Bridgend..... 3</td> <td>Neath Port Talbot E</td> </tr> <tr> <td>Caerphilly..... 4</td> <td>Newport..... F</td> </tr> <tr> <td>Cardiff..... 5</td> <td>Pembrokeshire.... G</td> </tr> <tr> <td>Ceredigion..... 6</td> <td>Powys..... H</td> </tr> <tr> <td>Carmarthenshire.. 7</td> <td>Rhondda Cynon Taf I</td> </tr> <tr> <td>Conwy..... 8</td> <td>Swansea..... J</td> </tr> <tr> <td>Denbighshire..... 9</td> <td>Torfaen..... K</td> </tr> <tr> <td>Flintshire..... A</td> <td>Vale of Glamorgan.. L</td> </tr> <tr> <td>Gwynedd..... B</td> <td>Wrexham..... M</td> </tr> </table>	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
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Gwynedd..... B	Wrexham..... M																						

<p>Q5 (IF LIVE OUTSIDE OF WALES)</p> <p>Is this your first visit to Wales? (22)</p> <p>Yes..... 1</p> <p>No..... 2</p> <p>Don't know / can't remember..... 3</p>	<p>Q11 Working status (36)</p> <p>Working full time (30+ hrs per week)..... 1</p> <p>Working part time (> 29 hrs per week).... 2</p> <p>Full time education..... 3</p> <p>Retired..... 4</p> <p>Looking after the home..... 5</p> <p>Full time carer..... 6</p> <p>In training..... 7</p> <p>Other..... 8</p>
<p>Q6 (IF LIVE IN WALES)</p> <p>Is this your first visit to this part of Wales? (23)</p> <p>Yes..... 1</p> <p>No..... 2</p> <p>Don't know / can't remember..... 3</p>	<p>Q12 Status in household (37)</p> <p>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</p> <p>Other adult (aged 16+)..... 2</p>
<p>Q7 (ASK ALL) – SHOWCARD B</p> <p>Which of the following best describes your party on this visit? (24)</p> <p>SINGLE CODE</p> <p>Visiting alone..... 1</p> <p>A couple..... 2</p> <p>Family – with young children..... 3</p> <p>Family – with older children..... 4</p> <p>Family – with young and older children..... 5</p> <p>Family – without children..... 6</p> <p>Friends..... 7</p> <p>Organised group / society..... 8</p> <p>Other..... 9</p>	<p>Q13 Occupation of Chief Income Earner</p> <p>(last job if retired)</p> <p>Actual job</p> <p>_____</p> <p>Position / grade</p> <p>_____</p>
<p>Q8</p> <p>How many people are in your visitor party today, including yourself?</p> <p>WRITE IN NO. OF ADULTS & CHILDREN</p> <p>Adults:</p> <p>Children:</p>	<p>Q14 Social grade (38)</p> <p>AB..... 1</p> <p>C1..... 2</p> <p>C2..... 3</p> <p>DE..... 4</p>
<p>Q9 Gender (31)</p> <p>Male..... 1</p> <p>Female..... 2</p> <p>Other 3</p> <p>Prefer not to say..... 4</p>	<p>Q15 SHOWCARD C</p> <p>What is your ethnic group?</p> <p>White Welsh 1</p> <p>White British/English/Scottish/Northern Irish 2</p> <p>White Irish..... 3</p> <p>White Gypsy or Irish Traveller..... 4</p> <p>Other White..... 5</p> <p>White and Black Caribbean..... 6</p> <p>White and Black African..... 7</p> <p>White and Asian..... 8</p> <p>Other Mixed/Multiple ethnic background..... 9</p> <p>Indian..... 10</p> <p>Pakistani..... 11</p> <p>Bangladeshi..... 12</p> <p>Chinese..... 13</p> <p>Japanese..... 14</p> <p>Other Asian background..... 15</p> <p>African..... 16</p> <p>Caribbean..... 17</p> <p>Other Black/African/Caribbean background..... 18</p> <p>Arab..... 19</p> <p>Any other ethnic group..... 20</p>
<p>Q10 Age (32)</p> <p>PLEASE WRITE IN EXACT AGE _____</p> <p>IF REFUSE, PLEASE ASK FOR AGE BAND</p> <p>16-19..... 1 55-64..... 6</p> <p>20-24..... 2 65-74..... 7</p> <p>25-34..... 3 75-84..... 8</p> <p>35-44..... 4 85+..... 9</p> <p>45-54..... 5 Refused..... A</p>	

<p>SHOWCARD D</p> <p>Q16 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.</p> <p>CAN MULTI-CODE</p> <p>A Mobility impairment (wheelchair user)..... 1</p> <p>B Mobility impairment (non-wheelchair user)..... 2</p> <p>C Blind..... 3</p> <p>D Partially sighted..... 4</p> <p>E Deaf..... 5</p> <p>F Partial hearing loss..... 6</p> <p>G Learning difficulties..... 7</p> <p>H Long-term illness (e.g. AIDS, arthritis, cancer, diabetes)..... 8</p> <p>None of these 9</p>	<p>Q18 Have you heard of a campaign called The Wales Way?</p> <p>Yes 1</p> <p>No 2</p> <p>Don't know 3</p>
<p>SHOWCARD E</p> <p>Q17 Have you seen or heard any of these types of advertising, marketing and publicity for Wales before your visit today?</p> <p>CAN MULTICODE</p> <p>TV advertising..... 1</p> <p>TV programme..... 2</p> <p>Cinema advertising..... 3</p> <p>Radio advertising or programme..... 4</p> <p>Read an article in a newspaper or magazine (print or online)..... 5</p> <p>Saw an advert, flyer or supplement in a newspaper / magazine..... 6</p> <p>Outdoor advertisement (e.g. posters, bus sides, airports, stations)..... A</p> <p>Online ad (inc. still or moving ads)..... B</p> <p>Social media (online e.g. Facebook, Twitter etc)... C</p> <p>The official tourist board website www.visitwales.com..... D</p> <p>Other website (e.g. TripAdvisor)..... E</p> <p>Word of mouth / conversation with others in person..... F</p> <p>Direct mail / flyer..... G</p> <p>Email newsletter..... H</p> <p>Other..... I</p> <p>None of these J</p>	<p>SHOWCARD F</p> <p>IF YES TO Q18</p> <p>Q19 To what extent did The Wales Way influence your decision to visit Wales? Scale of 1-10</p> <p>1 - No influence at all 1</p> <p>2 2</p> <p>3 3</p> <p>4 4</p> <p>5 5</p> <p>6 6</p> <p>7 7</p> <p>8 8</p> <p>9 9</p> <p>10 - Only reason I visited A</p>

Annex B

Stage 2 questionnaire

B01919-2
2019 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

READ OUT: You have the option to withdraw from the survey at any point during the interview. You can view full details of our Privacy Notice at [insert link]

S2 Are you happy to continue (now or at another time)?

Yes – IF YES, CONTINUE

No – IF NO, PLEASE THANK THEM FOR THEIR TIME AND END THE INTERVIEW

SECTION 1 – VISITING WALES

ASK IF STAYING VISITOR

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

Q2 How many times in the last year have you taken a day trip in/to 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

Q3 What type of trip was your recent trip in/to Wales? **READ OUT**

Main holiday of the year

Secondary / additional holiday

Short break

Other

Don't know / can't remember

ASK IF STAYING VISITOR

Q4 Which one of the following statements best applies to your trip?
READ OUT – SINGLE CODE

1. Wales was my main or only 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 IF STAYING VISITOR

Q5 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

Q6 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

Q7 What was your main method of transport to reach Wales?
READ OUT AS NECESSARY - SINGLE CODE - RECORD IN COLUMN A

ASK ALL

Q8 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

	Q7	Q8
	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 & MOTIVATIONS FOR VISITING

ASK ALL

Q9 Which of the following were your reasons for visiting Wales / visiting the part of Wales where we interviewed you a few weeks ago? **READ OUT – CODE ALL MENTIONED**

IF MORE THAN ONE CODED AT Q9 ASK Q10

Q10 And which one was your main reason for visiting Wales / visiting the part of Wales where we interviewed you? **READ OUT – SINGLE CODE**

To take part in outdoor or sporting activities (e.g. walking, cycling, fishing etc.) → **Q11**

To attend an event / concert / performance / sporting event → **Q12**

To enjoy the landscape / countryside / beach → **Q13a**

To visit places / historical sites / religious sites / specific attractions / go sightseeing → **Q14**

For a city break / visit to a large town → **Q14**

To shop

To visit friends or relatives

To attend a special event / celebration such as a wedding or graduation

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 Q9

Q11 Which of the following did you take part in during your trip? **PROBE** Any other outdoor or sporting activities or events? **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

A sporting event or race, e.g. half-marathon, cycling event, triathlon

Other (**please specify**)

Don't know / can't remember

ASK IF CODE 2 AT Q9

Q12 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 Q9

Q13a 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 - **ASK Q13b**
- 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 Q13a

Q13b 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 Q9

Q14 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 Q15

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

GO TO Q16

ASK IF CODE 1-10 AT Q14

Q15 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

ASK ALL

Q16 Thinking broadly about your decision to choose Wales for this [day visit / holiday or short break], which of these other factors **attracted** you to come to Wales or this part of Wales?
READ OUT – RANDOMISE ORDER. CAN MULTICODE

- To help you relax and escape from the stresses of life
- It is easy to get to
- Holidayed before and wanted to return
- Have always wanted to visit
- To visit a particular attraction / place
- My Welsh ancestry

Other (**please specify**)
None of these
Don't know

ASK IF STAYING VISITOR

Q17 Which of the following **persuaded** you to spend your holiday/short break in Wales on this occasion? **READ OUT – RANDOMISE ORDER. CAN MULTICODE**

- Recommended by friends / relatives / colleagues
- Wanted to holiday at home rather than abroad
- Found a good deal / special offer
- Traveller review websites
- Price of hotels / accommodation
- Saw something on social media about Wales
- Price of airline tickets
- Direct advice from travel agent / tour operator
- Good exchange rates

Other (**please specify**)
None of these
Don't know

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

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

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

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

SINGLE CODE

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

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

ASK IF STAYING VISITOR AND STAYED IN COMMERCIAL ACCOMMODATION

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 AND STAYED IN COMMERCIAL ACCOMMODATION

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 a link on the VisitWales.com website
- Through a travel agent or tour operator
- Through a tourist information centre
- Through Airbnb
- Just turned up → **SKIP Q24**
- Other (please specify) → **SKIP Q24**

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

ASK IF STAYING VISITOR 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

ASK IF STAYING VISITOR AND STAYING IN COMMERCIAL ACCOMMODATION

Q25 How important were the following to you when booking your accommodation in Wales during this holiday / trip? **READ OUT – RANDOMISE ORDER**

- a) The official grading or star rating of the accommodation (that is, through an organisation such as Visit Wales or the AA)
- b) The scores given by other travellers through websites such as TripAdvisor, Booking.com etc.

	Q25a)	Q25b)
	Official grading or star rating	Scores given by other travellers
Very important		
Quite important		
Not very important		
Not at all important		
Don't know		

SECTION 6 – SOURCES OF INFORMATION AND MARKETING

ASK ALL

Q26 In planning and gathering information for your recent trip in/to 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 Q26)

Q27 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 Q27

Q28 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)

Q29 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

Q30 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 CODED 1 OR 3 AT Q30

Q31 Can you remember which types of website or app 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 Q30

Q32 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

Q33 Have you seen or heard any advertising, marketing or publicity for 'Year of Discovery 2019'? **SINGLE CODE**

Yes
No

Don't know / can't remember

IF YES AT Q33

Q34 To what extent did the 'Year of Discovery 2019' 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

Q35 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

Q36 Thinking about your recent visit in/to 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

Q37 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

Q38 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 | 15. Digital connectivity, e.g. mobile phone signal, availability of wifi |
| 2. Places to visit in Wales | 16. Helping you relax and escape from the stresses of life |
| 3. Quality of the natural environment | 17. Wales overall as a place to visit → |
| 4. Shopping | ALWAYS COMES AT THE END OF THE LIST |
| 5. Feeling of welcome | |
| 6. Cleanliness of streets | |
| 7. Feeling of security | |
| 8. Cleanliness and availability of public toilets | |
| 9. Standard of tourist signposting | |
| 10. Cleanliness of beaches | |
| 11. Sea water quality | |
| 12. Accessibility for people with a disability / long-term illness | |
| 13. How pet-friendly you found it to be | |
| 14. Quality and availability of public transport | |

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 17 – ‘WALES OVERALL AS A PLACE TO VISIT’

Q39 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 apart from the weather? **PROBE** – Anything else?
RECORD VERBATIM

Nothing
Don't know

ASK ALL

Q40 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

Q41 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 IF STAYING VISITOR

Q42 How likely are you to come to Wales for a day trip 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 IF DAY VISITOR

Q43 How likely are you to come to Wales for a leisure break or holiday 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

ASK IF OVERSEAS VISITOR

Q45 I'm now going to read out some paired statements. Please tell me which of the two statements in each pair best describes you. Don't think too long about each – just answer as quickly as you can. **READ OUT – ORDER OF STATEMENTS TO BE RANDOMISED (AND ORDER WITHIN PAIRS)**

i)	I care about the image I portray to others	I am comfortable with who I am – I don't care about how others see me
ii)	I always seek out new experiences	I know the type of things I like, and tend to stick with that
iii)	I am more of a city person	I enjoy spending time in the outdoors and in natural landscapes
iv)	When I travel abroad, I like to get off the beaten track	When I travel abroad, I want to see the world's most famous sites
v)	I prefer holidays full of action and adventure	I prefer holidays at a slower and more relaxed pace
vi)	When I travel, I enjoy exclusive or luxury experiences that others might find unaffordable	When I travel, I like to be comfortable but I don't seek out luxury

ANY PARTNER-SPECIFIC QUESTION TO BE ADDED HERE

ASK ALL

Q46 Do you have any other comments you would like to make about your trip to/in Wales?
RECORD VERBATIM

No other comments

ASK ALL

Q47 Finally, would you be willing to be re-contacted by Beaufort to take part in a further stage of research for Visit Wales about your trip to Wales?

All information provided will be completely confidential, and by saying yes now, you will not be committing yourself to a further interview if 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.

To confirm, the Privacy Notice can be found at [insert link]

Thanks again and goodbye.

Annex C

Interviewing locations

Interviewing locations

Region	Location/ attraction	Partner buy-in organisation (if applicable)
North Wales	Anglesey Sea Zoo	
	Beaumaris Town Centre	
	Betws-y-Coed	
	Caernarfon Town Centre	
	Coed y Brenin	Natural Resources Wales
	Colwyn Bay Waterfront	
	Conwy Town Centre	
	Erddig	
	Holyhead Ferry Terminal / Station	Anglesey County Council
	Llanberis	
	Llandudno Promenade	
	Llangollen Town Centre	
	Loggerheads Country Park	
	Newborough	Natural Resources Wales
Pontcysyllte Aqueduct		
Porthmadog Town Centre		
Rhyl Promenade		
Surf Snowdonia		
Wepre Country Park		
Zip World (Blaenau Ffestiniog)		
Mid Wales	Aberystwyth Promenade	
	Brecon Town Centre	
	Bwlch Nant Yr Arian	Natural Resources Wales
	Cardigan Town Centre	
	Devil's Bridge	
	Elan Valley Visitor Centre	
	Machynlleth	Powys County Council
	Newquay	
	Newtown	Powys County Council
	Powis Castle	
Storey Arms		
Welshpool Town Centre		
Ynyslas	Natural Resources Wales	

Annex D

Explanation of multivariate analysis

Multivariate analysis means using three or more variables simultaneously in analysis. For example, it facilitates investigating the interrelationships between sets of variables, and the comparison of several groups in terms of several variables. We have used two types of multivariate analysis: factor analysis and multiple regression.

Factor analysis is a range of techniques that reduces a larger number of variables to a smaller number of composite variables, which are usually called factors. The method used here is a factor analysis called principal components analysis. This focuses on the total variance in the original data and the objective is to reduce the original variables to a smaller set of composite variables (called principal components or factors). Each of the factors reported captures a larger share of the variance than an original variable. It achieves this by linear combination of the original variables, in a way that the factors are uncorrelated with each other. This gives two advantages: a smaller set of variables, and variables that are uncorrelated and therefore suitable for use in multiple regression. The first factor contains the greatest variance; the second factor contains the next highest variance, and is as different as possible from the first factor; the third factor contains the next highest variance and is as different as possible from the other two, and so on.

We have used factor analysis to create new variables (factors) from all the original variables that are significantly correlated with each dependent variable (satisfaction, revisit, recommend).

Multiple regression is a dependence technique that analyses the relationship between one dependent variable and a number of independent variables, both of which need to be measured on scales. It tells us how well the independent variables 'predict' the dependent variable, and also the relative impact of each of the variables on this prediction. One of the requirements for multiple regression is that the independent variables are uncorrelated with each other. For this reason, the factors are used as independent variables. When we identify which factor(s) are good predictors, we can look at the variables that form the factor to identify the key predictor variables.

Annex E

Key results by marketing region

Table E1: Profile of UK day visitors by marketing region

%	Marketing region													
	TOTAL	Cardiff	Valleys	Wye Valley	Glam HC	Carms	Pembs*	Swans Bay	Cered'n	Mid Wales	Angl'y	NE Wales	Snow'a	Lland'no
<i>Base</i>	3,951	358	855	485	722	127	27	235	171	419	125	176	139	112
Visitor origin														
Wales	78	87	89	63	93	92	93	95	74	71	80	47	63	36
England	22	13	11	37	7	8	7	5	26	29	20	52	35	63
Scotland/NI	<1	-	-	<1	<1	-	-	-	-	-	-	1	2	1
Age														
16 - 34	24	26	24	22	27	19	19	28	17	21	33	18	28	21
35 - 54	39	39	43	33	31	38	56	46	45	30	32	40	43	44
55+ years	38	34	33	45	43	44	27	28	39	48	33	43	29	36
Gender														
Male	39	34	40	36	41	38	44	47	44	37	38	31	40	33
Female	61	66	60	64	59	62	56	53	56	63	62	69	60	67
Social grade														
ABC1	69	80	70	71	66	77	78	66	66	66	65	77	74	55
C2DE	31	19	31	29	29	23	22	34	35	33	35	24	26	46
Ethnicity														
White	97	93	97	97	96	95	100	96	98	98	99	99	95	96
Non-white /other	3	6	4	3	4	5	-	4	2	2	1	2	5	4

Base: all UK day visitors 2019 – Stage I (3,951)

Table notes: **Figures in red indicate a marked difference between the marketing region and Wales overall**

Caution – small base sizes for some marketing regions (*)

Key to marketing regions:

Cardiff	Cardiff, capital of Wales	Cered'n	Ceredigion / Cardigan Bay
Valleys	South Wales Valleys	Mid Wales	Mid Wales and Brecon Beacons
Wye Valley	Wye Valley and Vale of Usk	Angl'y	Isle of Anglesey
Glam HC	Glamorgan Heritage Coast	NE Wales	North East Wales
Carms	Carmarthen	Snow'a	Snowdonia Mountains and Coast
Pembs	Pembrokeshire	Lland'no	Llandudno and Colwyn Bay
Swans Bay	Swansea Bay		

Table E2: Main prompted reason for visiting Wales by marketing region

%	Marketing region													
	TOTAL	Cardiff	Valleys	Wye Valley	Glam HC	Carms*	Pembs*	Swans Bay	Cered'n	Mid Wales	Angl'y*	NE Wales*	Snow'a*	Lland'no*
<i>Base</i>	2,007	209	429	254	353	76	12	123	75	218	52	90	65	51
To enjoy the landscape/ countryside/ beach	27	6	19	10	35	30	50	33	43	11	21	37	25	57
To take part in outdoor or sporting activities	18	4	33	4	15	16	-	21	25	18	19	14	32	6
To visit places/ historical & religious sites/ attractions	15	38	15	24	4	21	17	13	1	16	4	24	8	12
Day trip/ family day out	12	17	14	9	14	11	-	18	11	9	15	10	8	6
To visit friends or relatives	7	8	7	9	8	7	8	4	8	5	10	6	8	4
To attend an event/ concert/ sporting event	7	19	5	9	7	11	-	9	-	5	2	3	5	2
To shop	6	1	1	22	12	-	8	-	5	22	2	1	5	4

Base: all UK day visitors 2019 – Stage II (2,007)

Table notes: **Figures in red indicate a marked difference between the marketing region and Wales overall**

Caution – small base sizes for some marketing regions (*)

Table E3a: Satisfaction with visit to Wales 2019 by marketing region

Mean score		Marketing region												
	TOTAL	Cardiff	Valleys	Wye Valley	Glam HC	Carms*	Pembs*	Swans Bay	Cered'n*	Mid Wales	Angl'y*	NE Wales*	Snow'a*	Lland'no*
<i>Base</i>	2,007	209	429	254	353	76	12	123	75	218	52	90	65	51
Wales overall as place to visit	9.3	9.3	9.3	9.3	9.2	9.3	9.5	9.4	9.4	9.4	9.2	9.3	9.3	9.6
Quality of natural environment	9.0	8.8	9.0	8.8	8.5	9.3	9.4	9.0	9.1	9.0	8.9	9.2	9.2	9.4
Feeling of security	9.0	9.0	8.9	8.9	8.6	9.4	9.1	8.9	8.9	8.9	9.0	9.2	9.2	9.1
Places to visit in Wales	8.9	8.8	8.7	8.9	8.7	8.9	8.9	8.9	8.3	8.9	8.8	8.9	9.0	9.4
Helping you relax....	8.8	8.5	8.7	8.4	8.5	9.1	9.1	8.9	8.9	8.6	8.6	9.1	9.2	9.1
Feeling of welcome	8.7	8.8	8.9	8.5	8.6	8.9	9.3	8.5	8.8	8.7	8.6	8.9	8.7	8.6
Overall value for money	8.5	8.7	8.8	8.3	8.1	8.4	8.2	8.5	8.9	8.6	8.1	8.7	8.3	8.8
Cleanliness of beaches	8.4	8.3	8.4	8.0	8.2	8.4	9.1	8.4	8.7	8.4	8.6	8.1	7.9	9.0
How pet-friendly you found it to be	8.4	8.0	8.7	8.0	8.1	8.6	7.7	8.6	7.8	8.2	8.5	8.7	8.5	8.6
Cleanliness of streets	8.1	8.1	7.9	8.1	7.8	8.6	7.9	8.0	8.1	8.0	7.9	8.3	8.3	8.9

Mean score	Marketing region													
	TOTAL	Cardiff	Valleys	Wye Valley	Glam HC	Carms*	Pembs*	Swans Bay	Cered'n*	Mid Wales	Angl'y*	NE Wales*	Snow'a*	Lland'no*
<i>Base</i>	2,007	209	429	254	353	76	12	123	75	218	52	90	65	51
Standard of tourist signposting	8.0	8.0	8.0	7.9	7.6	8.5	7.0	8.1	7.9	7.9	8.0	8.1	8.0	8.7
Sea water quality	7.9	7.7	7.9	7.9	6.7	8.5	9.3	7.6	8.3	8.2	8.6	8.0	8.4	8.3
Accessibility for people with a disability	7.6	7.5	7.7	7.1	7.5	8.4	6.0	7.9	7.5	7.0	7.1	7.6	7.5	8.4
Cleanliness & availability of public toilets	7.5	7.8	8.0	7.2	6.7	8.0	4.6	7.7	7.4	7.1	6.3	7.6	7.9	7.5
Shopping	7.5	8.2	7.7	7.6	7.6	7.8	7.2	7.0	6.9	6.9	7.1	7.5	7.3	8.3
Digital connectivity	7.4	8.1	7.0	7.6	7.5	7.7	6.4	7.8	6.9	7.1	7.4	6.8	6.6	8.2
Quality & availability of public transport	6.6	7.6	6.4	6.4	7.0	7.0	6.5	6.4	6.3	6.4	5.4	6.5	6.0	7.8

Base: all UK day visitors 2019 – Stage II (2,007)

Table notes: Mean score: 1= very dissatisfied, 10 = very satisfied (excluding 'don't know' and 'not applicable'); **Figures in red indicate a marked difference between the marketing region and Wales overall**

Caution – small base sizes for some marketing regions (*)

Table E3b: Satisfaction with eating out in Wales in 2019 by marketing region

Mean score	Marketing region													
	TOTAL	Cardiff	Valleys	Wye Valley	Glam HC	Carms*	Pembs*	Swans Bay	Cered'n*	Mid Wales	Angl'y*	NE Wales*	Snow'a*	Lland'no*
<i>Base</i>	2,007	209	429	254	353	76	12	123	75	218	52	90	65	51
Service	8.4	8.2	8.5	8.5	8.4	8.2	9.0	8.0	8.4	8.6	8.2	8.9	8.3	9.0
Quality of food	8.2	7.9	8.1	8.3	8.2	8.0	9.2	7.6	8.4	8.4	8.1	8.5	7.9	8.8
Value for money	8.0	7.5	8.2	8.3	8.0	7.9	8.0	7.4	8.0	8.1	8.1	8.2	7.9	8.7
Range of places to eat	7.3	7.9	6.7	7.7	7.6	7.2	8.5	6.6	7.4	7.5	7.2	7.4	6.9	8.3
Use of local or Welsh food on the menu	7.3	6.6	7.1	7.5	6.3	7.7	8.3	6.9	8.2	7.6	7.4	7.7	7.2	8.2

Base: all UK day visitors 2019 – Stage II (2,007)

Table notes: Mean score: 1= very dissatisfied, 10 = very satisfied (excluding 'don't know' and 'not applicable'); **Figures in red indicate a marked difference between the marketing region and Wales overall**

Caution – small base sizes for some marketing regions (*)

Table E4: Prompted recall of advertising, marketing or publicity for Wales pre-visit by marketing region

% seen	Marketing region													
	TOTAL	Cardiff	Valleys	Wye Valley	Glam HC	Carms	Pembs*	Swans Bay	Cered'n	Mid Wales	Angle'y	NE Wales	Snowd'a	Lland'no
Base	3,951	358	855	485	722	127	27	235	171	419	125	176	139	112
TV advertising	31	25	30	31	25	46	22	26	20	35	27	41	37	33
Social media	22	25	29	16	13	35	15	23	13	17	15	26	32	15
Word of mouth	11	8	15	8	3	24	-	10	14	8	7	16	16	10
Online advertising	11	13	14	6	4	27	4	13	10	10	2	8	14	3
Outdoor advertising	9	11	13	8	8	20	15	12	3	6	5	6	7	5
TV programme website	9	6	10	8	5	21	-	6	4	17	10	5	15	6
Article in paper/ magazine	8	6	6	6	2	27	7	8	6	7	4	13	5	4
Advert/ flyer in paper/ magazine	8	8	7	6	3	22	15	7	7	4	5	10	9	4
Visit Wales website	7	6	9	9	4	19	4	5	3	4	5	9	5	7
Website (other)	6	6	7	5	2	18	4	8	4	4	1	9	5	7
Radio advertising or programme	5	4	5	3	2	22	-	4	4	3	-	2	1	4
Others	10	9	7	13	6	28	4	5	21	7	5	14	15	4
Not seen any advertising	37	38	31	43	51	19	52	39	39	41	50	26	22	44

Base: all UK day visitors 2019 – Stage I (3,951) Table notes: **Figures in red indicate a marked difference between the marketing region and Wales overall**; Caution – small base sizes for some marketing regions (*)

Percentages may not add to 100% (more than one response is possible / data is rounded)