

# Wales Visitor Survey 2019

## UK Staying Visitors



Llywodraeth Cymru  
Welsh Government



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Analysis for Policy

## Wales Visitor Survey 2019 - UK Staying 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)<sup>1</sup>, Great Britain Day Visits Survey (GBDVS)<sup>2</sup> and International Passenger Surveys (IPS)<sup>3</sup> 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.

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<sup>1</sup> [GB Tourist 2019 report \(PDF, 2.8MB\)](#)

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

<sup>3</sup> [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 staying visitors** – separate reports are available for UK day 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 years<sup>4</sup>.

#### **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.

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<sup>4</sup> 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 Wales<sup>5</sup> 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.

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<sup>5</sup> **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 For overseas visitors, some interviewing shifts were scheduled for early mornings and late nights to take time differences into account and maximise response.
- 2.14 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.
- 2.15 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**

- 2.16 A mix of approaches was used for the supplementary qualitative research to obtain as much in-depth feedback as possible.
- 2.17 40 staying visitors were recruited in several different locations during their holiday and were firstly asked to keep a diary of their visit to Wales, covering their daily activities. This was followed by an online forum convened once visitors had returned home, looking back on their experiences. Participants posted on the forum's key topics over a number of days.
- 2.18 All participants lived outside Wales – most in England and some overseas (Canada, Germany, Italy, the Netherlands and the USA).
- 2.19 The sample achieved contained a mix of length of stay, life stage, reasons for visiting, different locations visited and number of previous trips to Wales. Those visiting to stay with friends and relatives were screened out.
- 2.20 The fieldwork period for Stage 3 was late July to October 2019.
- 2.21 A separate report is available on the qualitative phase<sup>6</sup>. Verbatim comments from online forum posts and diary entries of UK staying visitors participating in the qualitative phase have been included in the UK staying visitors report where relevant, to expand on key findings from the visitor survey.
- 2.22 This report also contains photos taken by participants while they were visiting Wales. Permission has been obtained for their photos to be used in this way.

### **Partner buy-in**

- 2.23 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.

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

2.24 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**

2.25 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 months<sup>7</sup>)
- By Visit Wales UK marketing segmentation<sup>8</sup>
- By Welsh region visited.

2.26 In addition, results are provided by Visit Wales marketing region<sup>9</sup> for selected key measures at Annex E.

2.27 The full data tabulations for the survey provide results broken down by a wide range of variables.

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

<sup>8</sup> 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

<sup>9</sup> 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

### 3. Findings

#### Profile of UK staying visitors

- 3.1 The majority (84%) of UK staying visitors to Wales in 2019 came from England, as in previous years. Wales accounted for 14% of UK staying visitors, while just 1% came from other parts of the UK – nearly all from Scotland, with a very small number from Northern Ireland. The proportion of Welsh residents holidaying in Wales was higher in the peak summer months than in the shoulder period. Conversely, there were higher proportions of staying visitors from England in the shoulder months than during peak months (see Table 3.1).
- 3.2 The profile of UK visitors staying in Wales continues to be older and more affluent in terms of socioeconomic grade than the UK population generally. Just 16% of UK staying visitors in 2019 were aged between 16 to 34 years (compared with 31% of UK adults<sup>10</sup> in this age range), while around four in ten (44%) were aged between 35 to 54 years (compared with 32% of UK adults). The remaining 39% were aged over 55.
- 3.3 The age profile of UK staying visitors is younger in 2019 than it was in 2013, however, when over 55s accounted for almost half (46%) of UK holidaymakers in Wales. Shoulder period visitors in 2019 included a higher proportion of older visitors than was the case in the peak period.
- 3.4 Staying visitors from Wales had a slightly younger age profile than staying visitors from the rest of the UK: 20% of Welsh staying visitors in 2019 were aged 16 to 34 compared with 16% of visitors from England, Scotland and Northern Ireland; 40% of the latter were aged 55 and over compared with 37% of the former.
- 3.5 Women accounted for 59% of UK staying visitors interviewed in 2019. Women make up 51% of the UK population<sup>11</sup>.

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<sup>10</sup> Source: ONS 2018 Mid-Year Population Estimates UK - <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland>

<sup>11</sup> 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.

- 3.6 Almost three in four (73%) UK staying visitors to Wales in 2019 fell into the ABC1 social grades<sup>12</sup>, compared with 55% of the UK population<sup>13</sup>. There were a higher proportion of ABC1 visitors from the UK holidaying in Wales during the shoulder months than in the peak period (at 76% compared with 72% respectively). Visitors from the C2DE social grades accounted for just over one in four staying visitors overall in 2019 (27%) but their proportion fell to 23% in the shoulder period.
- 3.7 While a strong skew towards ABC1s was also evident in the profile of Welsh staying visitors, a higher proportion of staying visitors from Wales fell into the C2DE social grades than those from the rest of the UK. 69% of Welsh staying visitors were ABC1, compared with 74% of visitors from the rest of the UK, while the proportion of C2DEs was 31% and 25% respectively.
- 3.8 7% of UK staying visitors in 2019 spoke Welsh – 3% fluently. The proportion of Welsh speakers rose to 33% among staying visitors from Wales, with almost equal proportions of fluent and non-fluent Welsh speakers (17% and 16%). These are at similar levels to previous waves.
- 3.9 As in earlier years, Black, Asian and Minority Ethnic visitors accounted for a very small proportion of those holidaying in Wales from the UK in 2019 (2%).

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<sup>12</sup> 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

<sup>13</sup> Source: NRS 2016 [www.nrs.co.uk/nrs-print/lifestyle-and-classification-data/social-grade/](http://www.nrs.co.uk/nrs-print/lifestyle-and-classification-data/social-grade/)

**Table 3.1: Profile of UK staying visitors**

%	Trends over time			Peak vs shoulder 2019	
	2019	2016	2013	Peak	Shoulder
<b>Visitor origin</b>					
Wales	14	14	16	15	12
England	84	84	84	83	86
Scotland/NI	1	3	N/A	3	1
<b>Age</b>					
16 - 34	16	18	12	17	16
35 - 54	44	41	41	46	40
55+ years	39	40	46	38	44
<b>Gender</b>					
Male	41	46	N/A	40	42
Female	59	54	N/A	60	58
<b>Social grade</b>					
ABC1	73	72	67	72	76
C2DE	27	27	31	28	23
<b>Ethnicity</b>					
White	97	96	97	97	97
Non-white/other	2	4	3	4	2

Base: all UK staying visitors; 2019 - Stage I: 3,103; 2016 - Stage I: 2,892; 2013 - 1,618

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

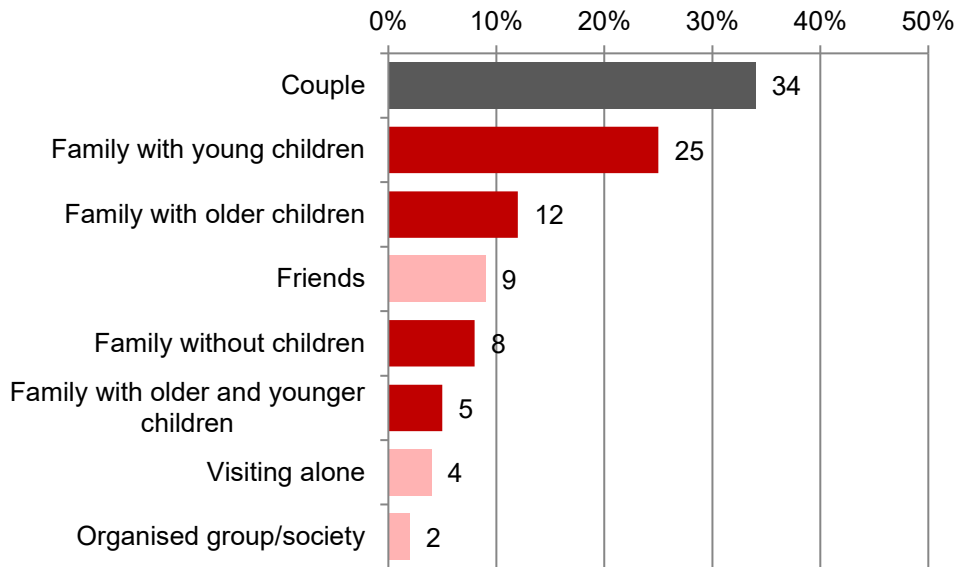
- 3.10 The proportion of UK staying visitors bringing pets on holiday to Wales has risen sharply – in 2019 more than one in five staying visitors (22%) had a pet with them (all of which were dogs), compared with 15% in 2016. Those staying in Wales during the shoulder period were more likely to be travelling with pets than those visiting during the peak summer months (at 25% compared with 21% respectively).
- 3.11 At Stage 2, all staying 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). Six in ten (58%) of those travelling with pets gave Wales a score of 9 or 10, with another 35% scoring it 5 to 8 and 3% rating Wales 5 or lower on this dimension.

- 3.12 Turning to visitor groups, 13% of UK staying visitor groups in 2019 included someone with a disability: 7% had a mobility impairment, 5% a long-term illness, 2% a hearing impairment and 1% a sight impairment or learning difficulties. This is similar to the incidence among the UK population (estimated at 12%<sup>14</sup>).
- 3.13 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. Fewer than one in four (24%) of those holidaying in Wales with someone with a disability within their party gave a very satisfied score (9 or 10). Most (42%) gave a moderately satisfied score (between 5 to 8) while 4% gave a score of 4 or below (the remainder did not answer).
- 3.14 Wales mainly attracted families and couples on staying visits in 2019, as in previous years. The proportion of couples holidaying in Wales is declining, however – it now stands at 34%, compared with 38% in 2016 and 42% in 2013. Families accounted for half of UK staying visitors in 2019, up from 41% in 2016, with a rise in the proportion of families with older children coming for a short break or holiday (now 12%, up from 4% in 2016) (see Figure 3.1).

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<sup>14</sup> 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](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 staying visitors Stage I (3,103)

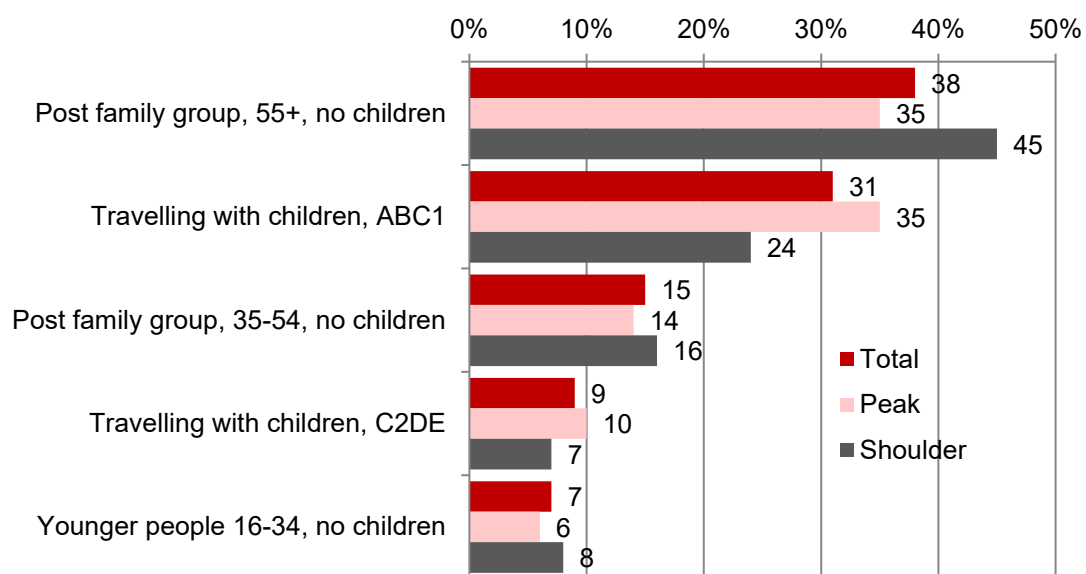
- 3.15 Couples were more likely to visit Wales during the shoulder months than the peak season in 2019 (at 40% shoulder and 31% peak respectively), while the reverse was true for families with young children (at 29% peak and 17% shoulder). Families with young children accounted for 30% of Welsh staying visitors but only 24% of staying visitors from the rest of the UK.
- 3.16 The average party size among UK staying visitors in 2019 has risen to 4.0, up from 3.5 in 2016. This is largely the result of an increase in the average number of adults per party (now 3.1, up from 2.8 in 2016). The average number of children per party has remained stable, at 0.9. Unlike 2016, party sizes for visitor groups from England in 2019 were slightly larger than those from Wales (at 3.1 for England compared with 2.8 for Wales). Parties staying during the shoulder period were larger than those staying during the peak summer months (at 4.2 compared with 3.8). Apart from organised groups/societies, families with children represented the largest visitor groups (averaging 4.6 people per party).
- 3.17 UK staying visitors were also classified into five groups, according to the Visit Wales UK marketing segmentation. Reflecting the age and social grade profile of visitors, almost four in ten UK staying visitors were *Post family*



group, 55+, no children (38%) while around a third were *Travelling with children, ABC1* (31%). All other segments accounted for much smaller proportions of staying visitors.

3.18 Almost half of all staying visitors to Wales during the shoulder months (45%) fell into the *Post family group, 55+, no children* segment, while the same was true for the *Travelling with children, ABC1* and *Travelling with children, C2DE* segments during the peak summer period (see Figure 3.2).

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



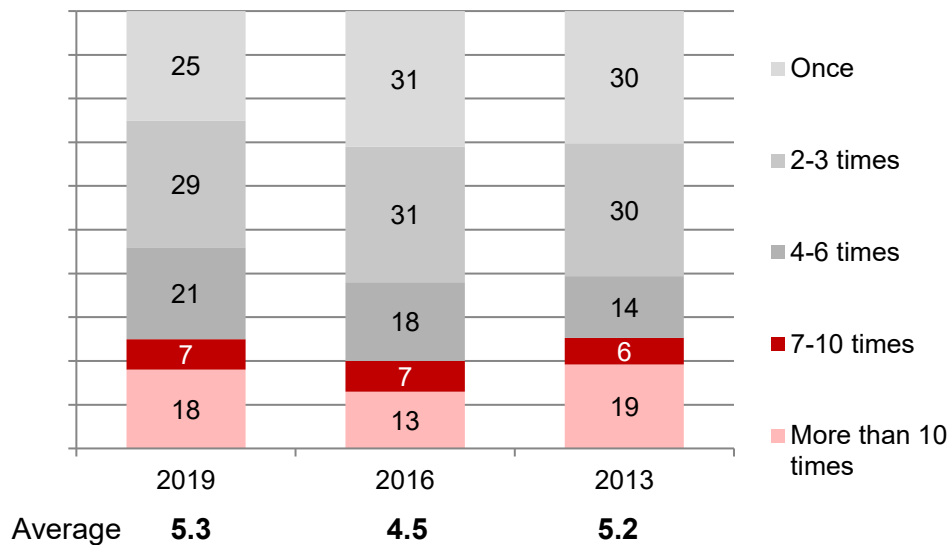
Base: 2019 Wales Visitor Survey – all UK staying visitors Stage I (3,103)

3.19 Staying visitors from Wales were slightly more likely to fall into the *Younger people, 16-34, no children* and *Travelling with children, C2DE* segments than staying visitors from England. In contrast, English staying visitors were more likely to belong to the *Post family group, 35-54, no children* and *Post family group, 55+, no children* segments.

3.20 Levels of repeat visits to Wales in 2019 were high; three in four (75%) UK staying visitors had visited Wales twice or more for a leisure break or holiday in the past three years. One in four (25%) were very frequent staying visitors, having made seven or more trips to Wales in recent years (see Figure 3.3).

- 3.21 One in four UK staying visitors (25%) were on their first leisure break or holiday in Wales when interviewed in 2019 – this has fallen from around 30% in 2016 and 2013.
- 3.22 The average number of staying trips taken in Wales in the past three years by UK staying visitors in 2019 was 5.3.

**Figure 3.3: Frequency of visiting Wales in last 3 years, over time - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)

- 3.23 Staying visitors from Wales were more likely to be repeat visitors than staying visitors from the rest of UK – almost nine in ten of the former (88%) had taken two or more leisure breaks or holidays in Wales in the recent past, compared with around seven in ten visitors (72%) from the rest of the UK. Welsh staying visitors were also more frequent visitors for leisure breaks or holidays, averaging 7.8 trips in the past three years, compared with an average of 4.9 trips for staying visitors from the rest of the UK.
- 3.24 No real difference was evident in frequency of visiting between peak and shoulder season visitors.

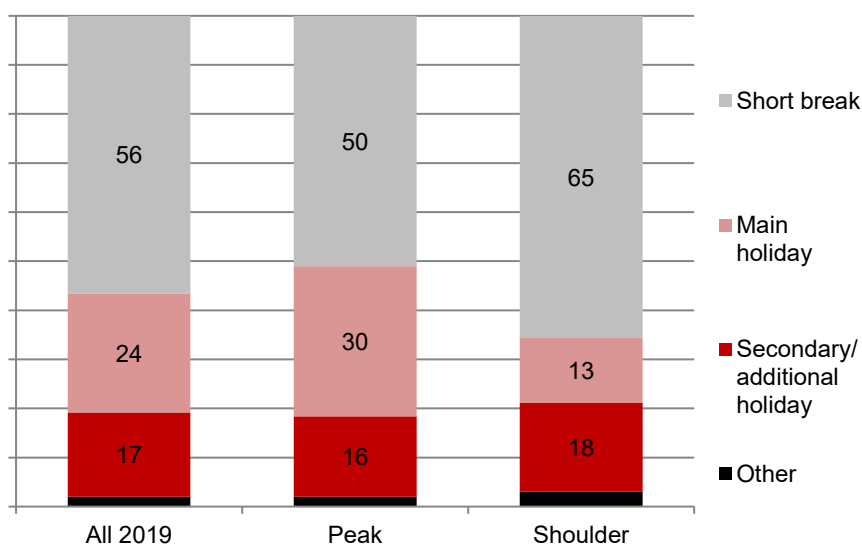
### Profile of trips taken by UK staying visitors

- 3.25 Wales is primarily a short-break destination rather than a main holiday destination for UK staying visitors: almost six in ten (56%) described their

current trip to Wales as a short break, more than double the proportion saying it was their main holiday (24%). These proportions have changed very little over time.

- 3.26 UK visitors staying during the peak summer period were more than twice as likely to be taking their main holiday of the year in Wales than those visiting during the shoulder months (at 30% compared with 13% respectively). Almost two thirds of UK staying visitors in the shoulder months (65%) described their trip as a short break (see Figure 3.4).
- 3.27 Welsh staying visitors were more likely than staying visitors from elsewhere in the UK to be taking a short break in Wales (at 71% compared with 54%) and less likely to be taking their main holiday there (at 15% compared with 25%).

**Figure 3.4: Type of trip to Wales, by peak/shoulder periods, 2019 - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)

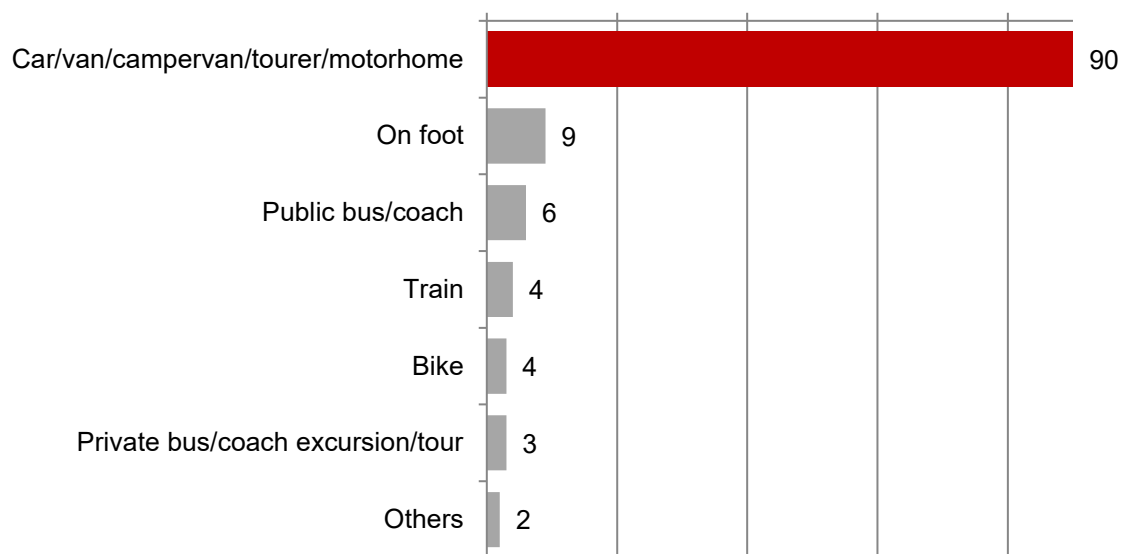
- 3.28 Of the Visit Wales marketing segments, those travelling with children (*Travelling with children, ABC1* and *Travelling with children, C2DE*) were most likely to be taking their main holiday in Wales, while *Younger people, 16-34, no children* were most likely to be taking a short break.
- 3.29 Staying visitors were asked whether their main holiday destination for this trip was Wales or another UK or European country, or whether they were on a touring holiday visiting different countries. For most UK staying visitors

(55%), Wales was their main or only holiday destination, especially in the peak period (60%). For 33% of staying visitors, another European or UK country was their main holiday destination (at 20% and 13% respectively), while the remaining 8% were touring around the UK and Europe, visiting several different countries.

- 3.30 During their time in Wales the majority of UK staying visitors (84%) were based in one location, while only 15% stayed in different places or toured around the country. *Younger people, 16-34, no children* were most likely to have toured around Wales (at 25% compared with 15% of visitors overall), while *Travelling with children, ABC1* and *Travelling with children, C2DE* were most likely to have been based in one location during their trip (at 90% and 91% respectively, compared with 84% of visitors overall).
- 3.31 As in previous waves of the visitor survey, the majority of UK staying visitors living outside of Wales travelled to Wales by car, van, campervan, tourer or motorhome (89% - unchanged from 2016). Very small proportions of visitors used other methods of transport: 4% train, 2% public bus or coach, 2% private bus/coach excursion/tour and 1% other means. Those staying in South Wales were most likely to have used public transport to reach Wales – 8% said they had used the train and 4% a public bus or coach – but car or campervan use still dominated (84%).
- 3.32 *Travelling with children, ABC1* and *Travelling with children, C2DE* segments were most likely to travel to Wales by car or campervan (at 94% and 97% respectively), while *Younger people, 16-34, no children* were most likely to use public transport (11% train and 5% public bus/coach).
- 3.33 Methods of transport used to get around Wales during their trip by staying visitors followed a similar pattern, with car, van, campervan, tourer or motorhome use dominating (used by 90% overall). Again, those travelling with children were most likely to travel around by car or campervan.
- 3.34 One in ten UK staying visitors used public transport during their visit to Wales (6% bus and 4% train) while around the same proportion either walked or cycled (12%).

3.35 When asked how satisfied they were with the quality and accessibility of public transport in Wales, almost four in ten (37%) of those who had used the public bus service or train while on holiday in Wales were very satisfied. Another third were moderately satisfied, while 6% were dissatisfied, giving a score of between 1 and 4 out of 10 (the remainder did not answer).

**Figure 3.5: Method of transport used to get around Wales during trip, 2019 - %**



*Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)*

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

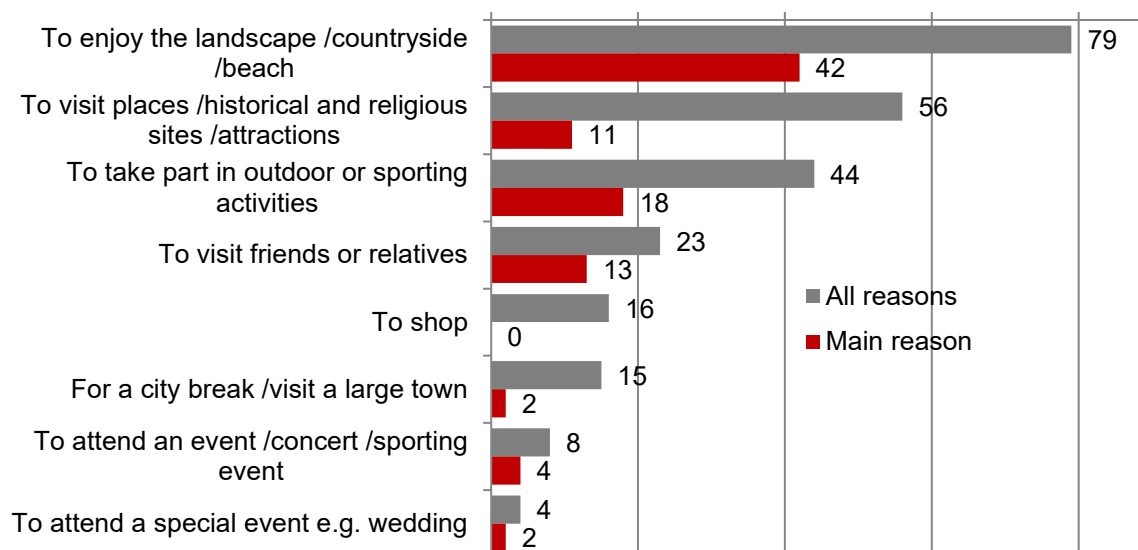
### **Motivations for visiting Wales**

3.36 UK staying visitors were asked which of a list of possible reasons for visiting Wales for a short break or holiday applied to them. They could choose as many or as few reasons as they wished.

3.37 The most popular motivations for coming to Wales were to **enjoy the country’s natural landscape** (mentioned by almost eight in ten visitors), to **visit particular places, historical and religious sites or attractions** (mentioned by almost six in ten) and to **take part in outdoor or sporting activities** (mentioned by over four in ten). Around one in five came to **visit friends or relatives**, to **shop** or **for a city break** (see Figure 3.6).

3.38 While the pattern of results in 2019 is similar to previous waves, there has been an increase in mentions of coming to Wales to enjoy the natural landscape (up from 67% in 2016 to 79% in 2019) and to take part in outdoor or sporting activities (up from 32% to 44%).

**Figure 3.6: Prompted reasons for visiting Wales 2019 - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)  
 Note: percentages may not add to 100% (more than one response is possible / data is rounded)

3.39 Overall, the single **main** reason for visiting Wales was to **enjoy the landscape/countryside/beach** – given by over four in ten UK staying visitors. This was more likely to be mentioned by visitors during the peak summer months than shoulder month visitors (at 44% compared with 38% respectively).

3.40 In contrast, visiting Wales to **take part in outdoor or sporting activities** (the next most popular main reason) was given by more shoulder period visitors than peak period visitors (at 22% 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.

3.41 The qualitative phase of research also identified Wales’ natural environment and scenery as a key motivator in choosing Wales for a staying trip. It was seen as a particular strength of Wales and something that set it apart as a holiday destination. Participants shared many photos of the landscape and

views that significantly contributed to their enjoyment of the trip, referring particularly to the coastline, beaches, mountains and countryside. Words used to describe Wales' scenery were 'beautiful', 'stunning', 'breath-taking', 'mind-blowing', 'awe inspiring', 'amazing' and 'unspoiled'.

**Figure 3.7: Qualitative feedback on Wales' natural environment/scenery**



3.42 The history of Wales was considered to be a major strength and a motivation for some UK staying visitors to visit according to the qualitative survey. Some believed that it contributed to the uniqueness of Wales, given the number of historical sites, especially castles, in a reasonably small area. The way in which some museums helped to give visitors insight into past ways of life was appreciated. Historical sites had also provided memorable moments in their holiday for some visitors in the qualitative research.

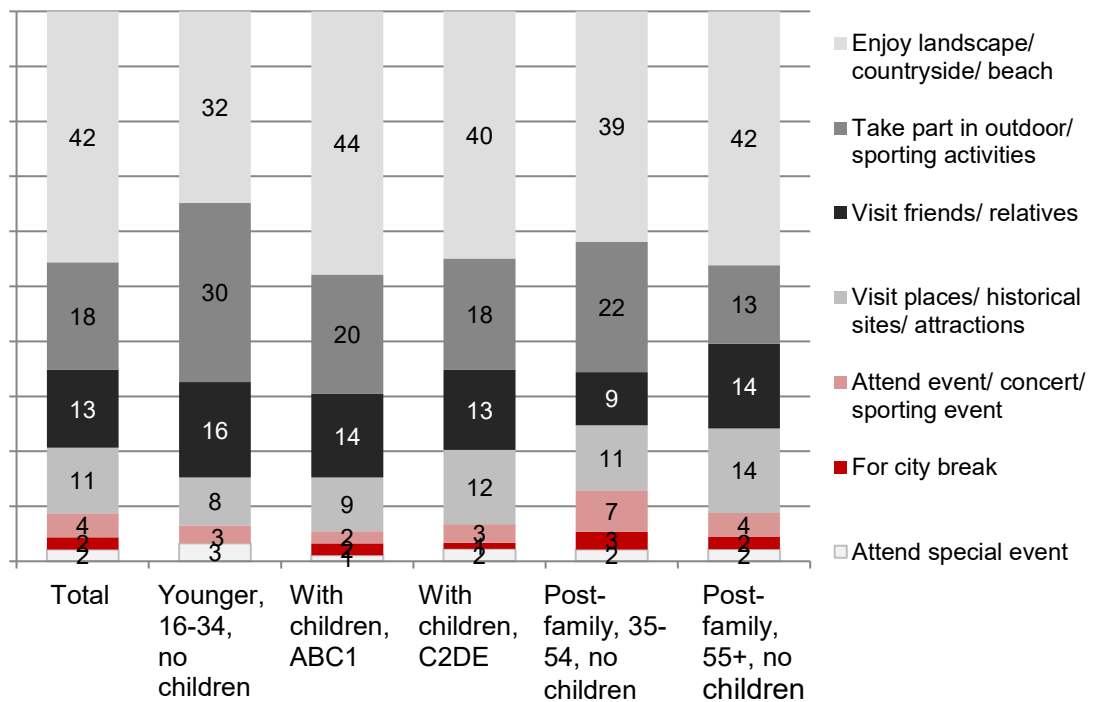
*[Wales] also has a rich and interesting history, the best example is their castles... The castles that are still in such good condition that tell a thousand stories [are uniquely Welsh]. (UK staying visitor - qualitative phase)*

*Even though we went with an intention of seaside leisure the part that stood up for me the most was Cardiff Castle. The voice guide and amazing structure with interesting history made me remember this place very well.  
(UK staying visitor - qualitative phase)*

*Ceredigion Museum was a celebration of Welsh life there - I loved the Welsh costume photos! (UK staying visitor - qualitative phase)*

3.43 While enjoying the landscape and natural environment of Wales was important across all marketing segments, the primary reasons for visiting Wales sometimes differed between marketing segments – *Younger people, 16-34, no children* were most likely of all groups to visit to take part in outdoor or sporting activities; *Post-family, 55+, no children* were most likely to come to visit places, historical or religious sites or attractions (see Figure 3.8).

**Figure 3.8: Main prompted reason for visiting Wales 2019 by marketing segment - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)

3.44 Staying visitors were also questioned about which other factors attracted them to come to Wales. They were read out a list and asked which of these factors had influenced them to choose Wales for their holiday or short break.



3.45 Almost three in four (74%) said they had come to help them relax and escape from the stresses of life, whilst around two-thirds said they had holidayed in Wales before and wanted to return, and that Wales is easy to get to (mentioned by 68% and 65% of UK staying visitors respectively) (see Figure 3.9).

**Figure 3.9: Prompted factors that attracted visitors to come to Wales 2019 - %**



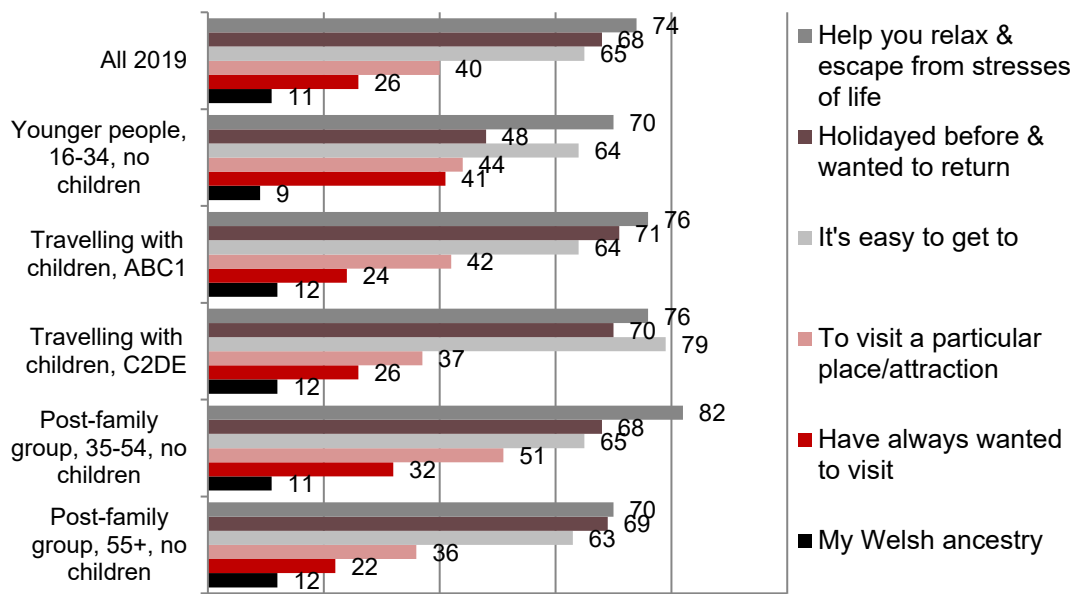
*Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)*

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

3.46 The main factor attracting Welsh staying visitors was that Wales was easy to get to, while for staying visitors from the rest of the UK it was to help them relax and escape from the stresses of life.

3.47 *Younger people, 16-34, no children* were least likely of all the marketing segments to say that they were attracted to Wales by having holidayed there before; *Post-family group, 35-54, no children* were most likely to mention they came to relax and get away from the stresses of life (see Figure 3.10).

**Figure 3.10: Prompted factors that attracted visitors to Wales, by marketing segment - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)  
 Note: percentages may not add to 100% (more than one response is possible / data is rounded)

3.48 Participants in the qualitative phase also referred to a sense of peacefulness experienced and their visit giving them a chance to pause and escape from the daily pressures of life.

*Wales for me represents a return to a simpler, unspoiled and traditional way of life... Back to nature. (UK staying visitor - qualitative phase)*

*Wales is lovely. It felt unspoilt and local. Somewhere I would like to bring my daughter again... (UK staying visitor - qualitative phase)*

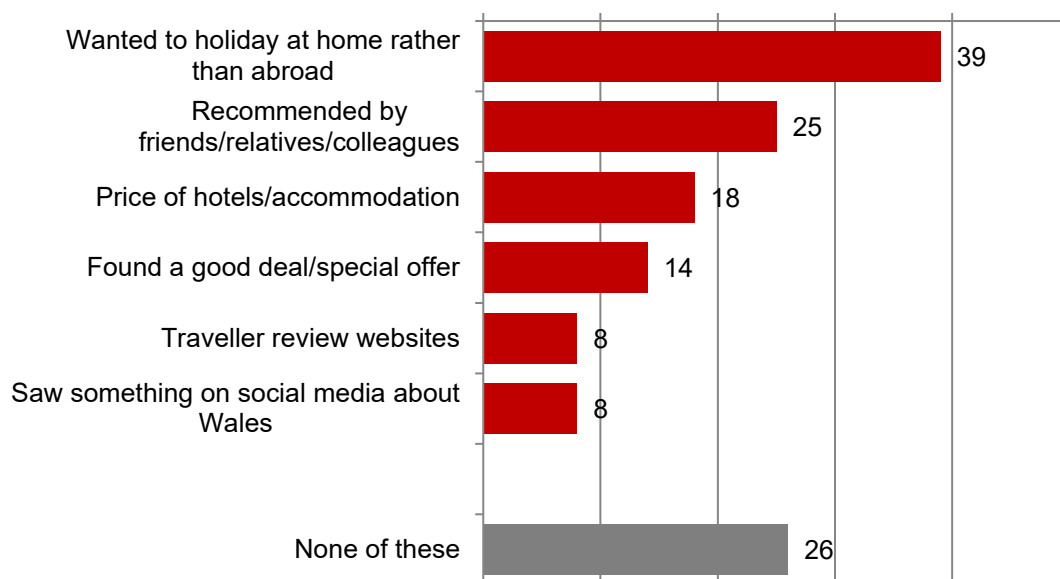
*It's a beautiful, unspoilt, sandy beach with fantastic views of Borth and the cliff to the left and Aber Dovey to the right. It's dog friendly all year round and is pretty quiet compared to Borth. We love it. (UK staying visitor - qualitative phase)*



3.49 UK staying visitors were asked what had persuaded them to spend their holiday/short break in Wales on this occasion. They were read out a list and asked which if any of these reasons applied.

- 3.50 Wanting to holiday at home rather than abroad was a factor for almost four in ten visitors (39%), particularly those from Wales (44%) and for families with children (43%). Recommendation was a factor for one in four UK staying visitors (25%), rising to 37% of new visitors to Wales (see Figure 3.11).
- 3.51 Wanting to holiday at home persuaded 44% of the *Travelling with children, ABC1* segment to spend their holiday in Wales, while recommendation by friends/colleagues/relatives influenced 34% of the *Younger people, 16-34, no children* segment to come. Finding a good deal/special offer was more likely to be mentioned by the *Travelling with children, C2DE* segment than other groups (at 24% compared with 14% overall)

**Figure 3.11: What persuaded visitors to spend their holiday/short break in Wales 2019 (prompted) - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)

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

### Activities undertaken while in Wales

- 3.52 Visitors who said they came to Wales for particular reasons were asked about which related activities they had undertaken during their trip.
- 3.53 Nearly eight in ten UK staying visitors (79%) gave **enjoying the landscape/countryside/beach** as a reason for visiting Wales. Of these visitors, nearly three in four (73%) had visited a beach during their stay (up

from 63% in 2016), while almost half had visited a country park/forest park (48%). Around three in ten of those who came to enjoy the natural environment had visited a wildlife attraction/nature reserve or done some wildlife watching during their visit – both had increased from 2016 levels.

- 3.54 Peak-time staying visitors were more likely to visit the beach than shoulder period visitors, but otherwise there was little difference by time of visit.
- 3.55 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 70% of those who had visited a beach in Wales during their stay.
- 3.56 Almost six in ten UK staying visitors (56%) said they had come to Wales to **visit places/historical or religious sites/specific attractions or to go sightseeing**. Of these, the majority (82%) had done some general sightseeing, up from 65% in 2016 and highest among peak staying visitors (at 87%). Six in ten had visited a castle or other historic attraction during their trip, while around four in ten had visited a nature-based attraction (up from 26% in 2016) or a museum or heritage centre.
- 3.57 Just over four in ten (44%) came to Wales to **take part in outdoor or sporting activities**. Of this group, the most popular activity undertaken was walking – 80% had walked over 2 miles and another 22% had walked less than 2 miles. Around one in five (22%) had taken part in swimming (up from 13% in 2016) or cycling (18%) during their stay. Mountain biking was more commonly undertaken by shoulder period visitors than peak period visitors.
- 3.58 Around one in ten (8%) said they had come to Wales to **attend an event/concert/performance or sporting event**. One in four of this group had attended a sporting event during their trip to Wales, while around one in five had been to a live concert or an arts/cultural festival/Eisteddfod (highest among peak-time visitors at 22%) (see Table 3.2).

**Table 3.2: Main activities undertaken in Wales**

%	Trends over time			Peak vs shoulder 2019	
	2019	2016	2013	Peak	Shoulder
<b>To enjoy the landscape/countryside/beach</b>					
(base: all who came to enjoy landscape/countryside/beach – 1,287)					
Visited the beach	73	63	67	78	65
Visited country parks/forest parks	48	46	34	47	50
Visited a wildlife attraction/nature reserve	30	24	N/A	30	30
Wildlife watching	27	19	10	27	26
Visited gardens	26	23	18	25	26
<b>To visit places/historical and religious sites/attractions</b>					
(base: all who came to visit places/historical and religious sites /attraction – 991)					
General sightseeing	82	65	47	87	74
Castle or other historic attraction	60	64	58	61	57
Nature-based attraction (e.g. gardens)	39	26	20	41	36
Museum or heritage centre	37	41	25	37	39
Scenic/steam/historic railway	27	17	18	27	26
Religious site (e.g. cathedral)	24	24	10	25	24
Industrial heritage attraction	22	21	16	24	19
Animal-based attraction (e.g. zoo)	17	13	11	19	13
Art gallery or exhibition	14	14	9	13	15
<b>To take part in outdoor or sporting activities</b>					
(base: all who came to take part in outdoor or sporting activities – 708)					
Walking (more than 2 miles)	80	75	55	82	76
Walking (less than 2 miles)	22	20	43	23	21
Swimming (indoor & outdoor)	22	13	N/A	29	12
Cycling	18	15	12	18	18
Mountain biking	15	13	2	12	19
Adventure sports	14	12	2	16	12
Water sports	11	8	6	15	5
<b>To attend an event/concert/performance/sporting event</b>					
(base: all who came to attend an event/concert/performance/sporting event – 135)					
Sporting event	25	17	8	27	22
Live concert	21	14	19	22	17
Arts/cultural festival/Eisteddfod	19	39	14	22	10
Theatre or cinema performance	13	12	11	11	19

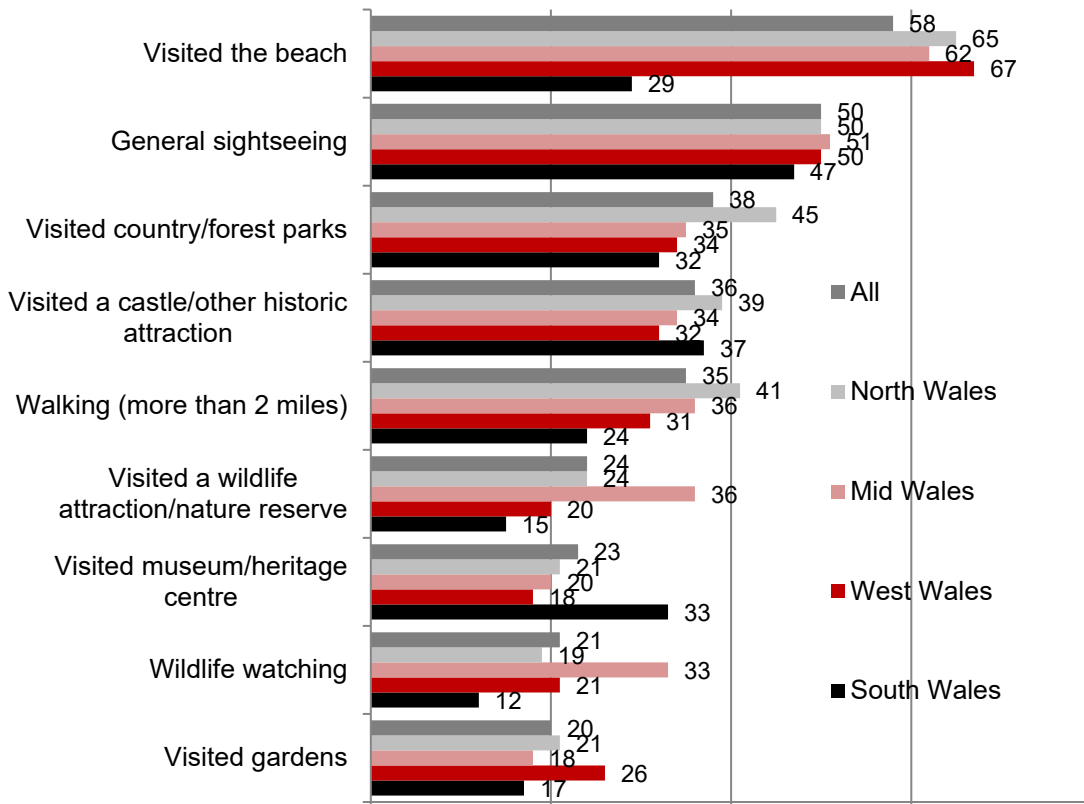
Base: all UK staying visitors; 2019 – Stage II: 1,642; 2016 – Stage II: 1,641; 2013 – 1,618

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

- 3.59 When looking at the total sample of UK staying visitors, the most popular activities overall were visiting a beach and general sightseeing (see Figure 3.12).

- 3.60 Clear regional differences are evident in the types of places visited and activities undertaken, reflecting the mix of attractions available across Wales.
- 3.61 Nearly six in ten UK staying visitors overall visited a beach in Wales during their stay; visitors staying in West and North Wales were the most likely to have done so, while visitors to South Wales were the least likely. Half of all UK staying visitors had done some sightseeing during their trip; this level was relatively consistent across all regions of Wales.
- 3.62 The next most popular activities were visiting a country park or forest park, visiting a castle or historic attraction and walking more than 2 miles (each carried out by almost four in ten UK staying visitors on their trip). Visiting a country or forest park and walking were most common among visitors staying in North Wales.
- 3.63 Around one in five visitors overall had visited a wildlife attraction/nature reserve, a museum/heritage centre, done some wildlife watching or visited gardens; visitors staying in Mid Wales were most likely to have visited a wildlife attraction or done some wildlife watching. Visitors to South Wales were most likely to have paid a visit to a museum or heritage centre during their trip.

**Figure 3.12: Activities undertaken/places visited in Wales, by region (based on total sample of UK staying visitors) - %**



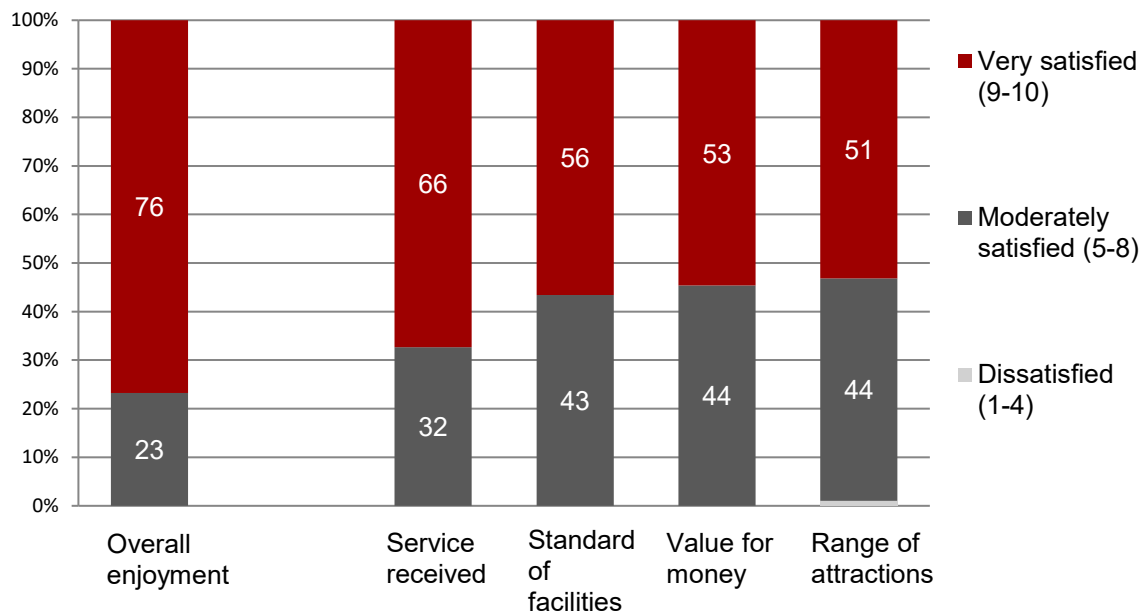
Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)  
 Note: percentages may not add to 100% (more than one response is possible / data is rounded)

### Perceptions of attractions visited

- 3.64 UK visitors who had visited an attraction in Wales during their stay 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 in four (76%) giving a score of 9 or 10 for their **overall enjoyment of the attractions** visited (see Figure 3.13).
- 3.65 The **service** received at the attractions visited was also rated particularly highly by visitors, with two-thirds giving a score of 9 or 10. Slightly lower scores were given for the **standard of facilities**, their **value for money** and the **range of attractions** available, with very satisfied scores ranging from 56% to 51% on each of these dimensions and higher proportions giving scores of between 5 to 8.

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

**Figure 3.13: Satisfaction with attractions visited in Wales 2019 - %**



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

3.67 Average satisfaction ratings for all dimensions were slightly higher than in 2016. No major differences were evident in satisfaction with attractions between peak and shoulder period visitors.

### Eating out and accommodation

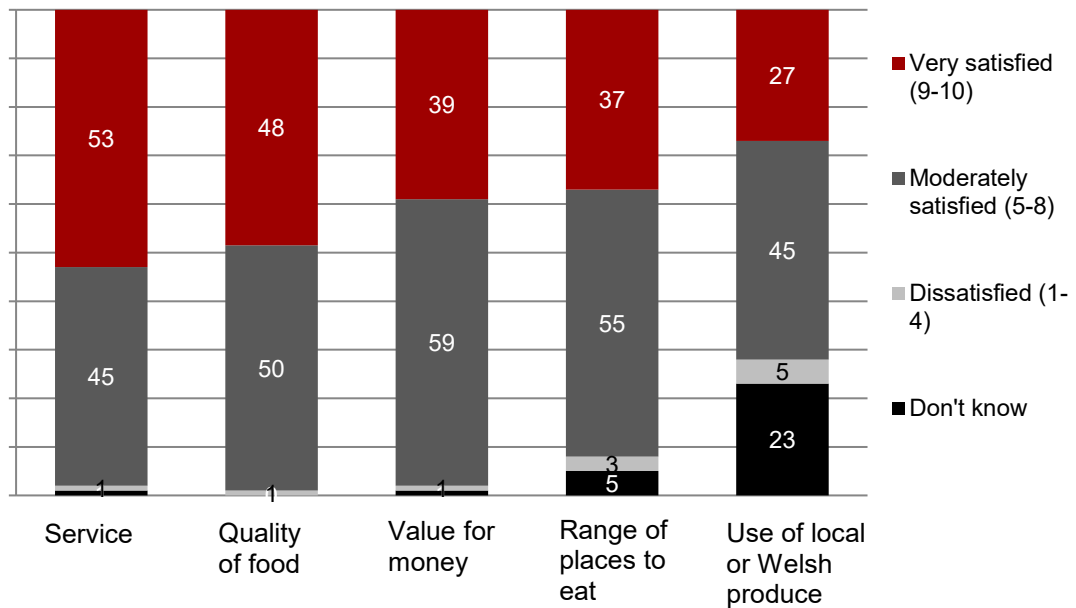
3.68 Over eight in ten UK staying visitors (83%) ate out during their trip in Wales (comparable to 2016 – 81%). Those least likely to eat out were the *Travelling with children, C2DE* marketing segment (at 75%).

3.69 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 over half (for the **service** provided) down to just over one in four (for the **use of Welsh and local produce on menus**). (see Figure 3.14).

3.70 While dissatisfaction with any dimension was very low, it was highest for the use of local Welsh produce (at 5%). Almost one in four were unable to comment, however.



**Figure 3.14: Satisfaction with eating out in Wales 2019 - %**



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

3.71 Satisfaction with most aspects of eating out in Wales has increased among UK staying visitors since 2016. The proportion of those eating out during their stay who were very satisfied with the service and quality of food in Wales has risen from 49% to 53% in 2019 and from 44% to 48% in 2019 respectively.

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

% 'very satisfied'	Trends over time	
	2019	2016
Service	53	49
Quality of food	48	44
Value for money	39	38
Range of places to eat	37	37
Use of local or Welsh produce	27	24

Base: Wales Visitor Survey – UK staying visitors Stage II (2019 – 1,369; 2016 – 1,641) Table notes: Very satisfied: scoring 9 or 10/10; 1 = very dissatisfied; 10 = very satisfied

3.72 As in previous years, hotels and self-catering accommodation were the most popular types of accommodation used by UK staying visitors when holidaying in Wales. In 2019 for the first time, more visitors to Wales used a self-catering house, villa, cottage, apartment or flat than used a hotel (22% compared with 17%). The use of hotels has been steadily declining (from 23% in 2013 to 17% in 2019) while self-catering has been growing over the

same period (from 15% in 2013 to 22% in 2019). This is likely to be linked to the growth in online accommodation marketplaces such as Airbnb.

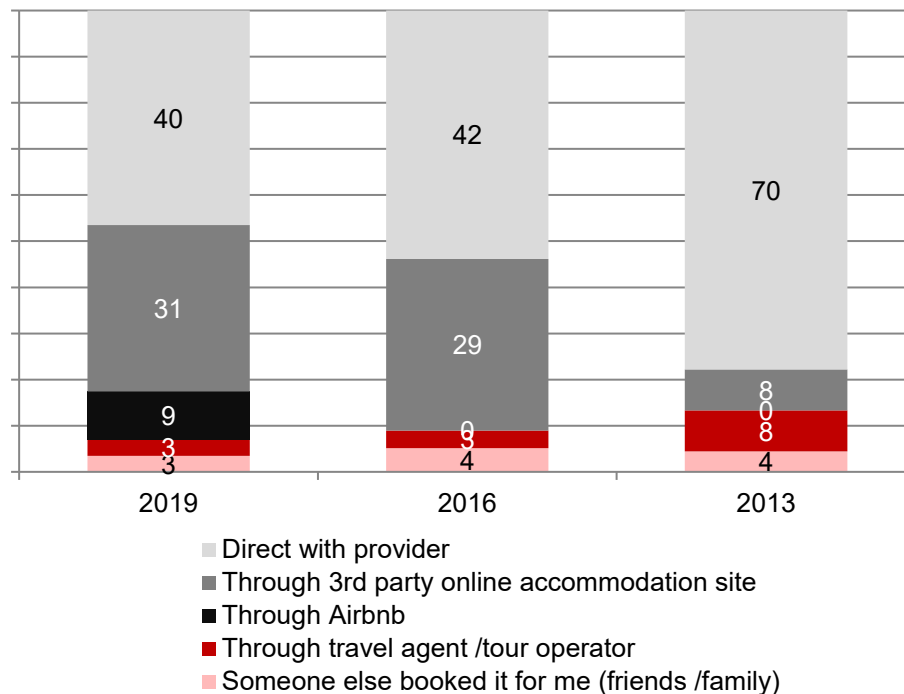
- 3.73 Other accommodation options used by around one in ten UK staying visitors in 2019 were a touring caravan/motorhome/campervan (used by 14%), a friend or relative's home (9%) or a B&B/guesthouse (8%). Static caravans (rented or owned) accounted for another 9% of stays.
- 3.74 Marked differences were evident in the accommodation choices of different marketing segments in Wales:
- *Travelling with children, ABC1* were most likely to choose self-catering
  - *Travelling with children, C2DE* were most likely to use either a touring caravan/campervan/motorhome or a static caravan (owned or rented)
  - *Post-family group, 35-54, no children* and *Post-family group, 55+, no children* were most likely to stay in a hotel
  - *Younger people, 16-34, no children*, were most likely to camp, stay at a friend or relative's home or stay in someone else's home on a commercial basis.
- 3.75 The most common ways of booking their accommodation or package for UK visitors staying in commercial accommodation were direct with the provider (done by 40%) or through a third-party online accommodation site such as Booking.com, Expedia or LateRooms.com (used by 31%). Booking direct with the accommodation provider has fallen back slightly from 2016 (down from 42%) while booking through a third party has risen since 2016 (up from 29%). Neither change is as sharp as the changes seen between 2013 and 2016 in booking methods, although it must be noted the base for 2013 is slightly different<sup>15</sup> (see Figure 3.15).
- 3.76 Another 9% booked through Airbnb, rising to 15% of the *Younger people, 16-34, no children* segment (Airbnb did not feature in the booking methods used

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<sup>15</sup> 2013 base is all UK staying visitors excluding those answering 'Not applicable'; 2016 and 2019 base is all UK staying visitors staying in commercial accommodation

in previous surveys). All other methods were used by a very small proportion of visitors.

**Figure 3.15: Main method of booking accommodation in Wales, over time - %**

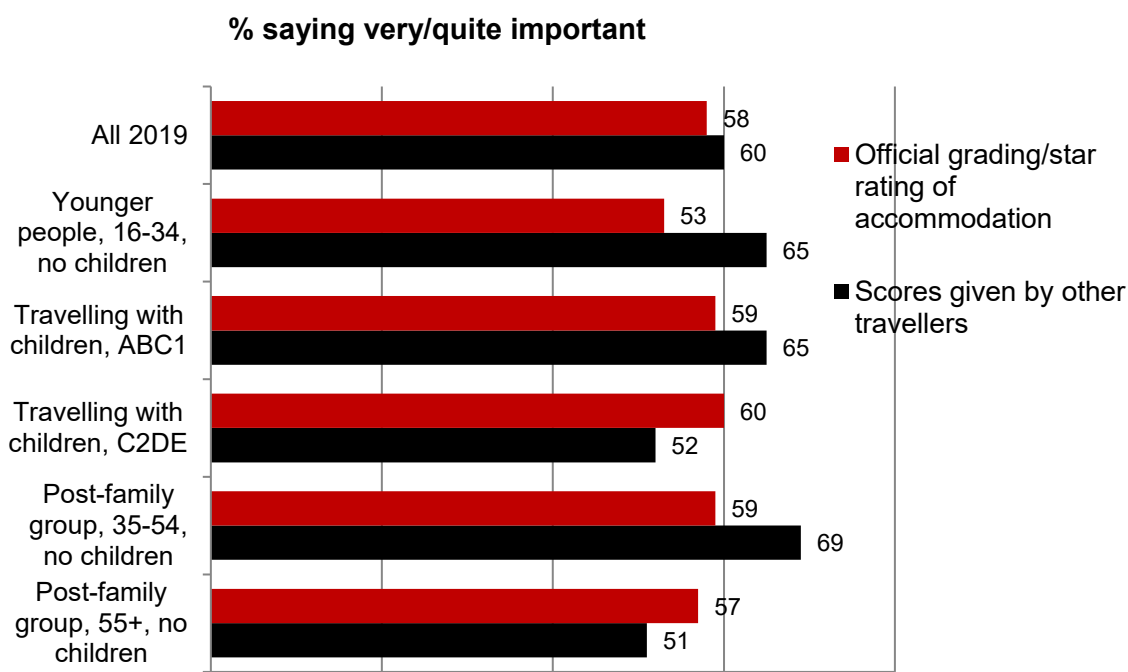


*Base: Wales Visitor Survey – all UK staying visitors Stage II staying in commercial accommodation  
 Note: 2013 base is all visitors excluding 'Not applicable' (2019 - 1,145; 2016 – 1,152; 2013 -1,141)*

- 3.77 Nine in ten of those who booked in advance (89%) had booked accommodation only and no travel. 5% had booked their accommodation and travel together with the same provider as part of a package, while 6% had booked accommodation and travel separately with different providers.
- 3.78 Older people aged 65+ and those in the *Post-family group, 55+, no children* segment were most likely to have booked their accommodation and travel to Wales as a package (at 14% and 11% respectively, compared with 5% overall).
- 3.79 Scores given by other travellers on websites such as TripAdvisor or Booking.com were important when booking their accommodation in Wales to six in ten UK staying visitors who had stayed in commercial accommodation. User ratings online were slightly more important than the official grading or star rating of the accommodation (important to 58% of these visitors) (see Figure 3.16).

- 3.80 Conversely, neither of these were important when booking their trip to one in four UK visitors who had stayed in commercial accommodation in Wales.
- 3.81 Scores given by other travellers were particularly important to the *Post-family group, 35-54, no children* but were least likely to be important to the *Travelling with children, C2DE* segment. In contrast, the official grading/star rating of the accommodation was of equal importance to most segments, with the exception of the *Younger people, 16-34, no children* group.

**Figure 3.16: Importance of official grading/star ratings and ratings given by other travellers when booking accommodation, by marketing segment**

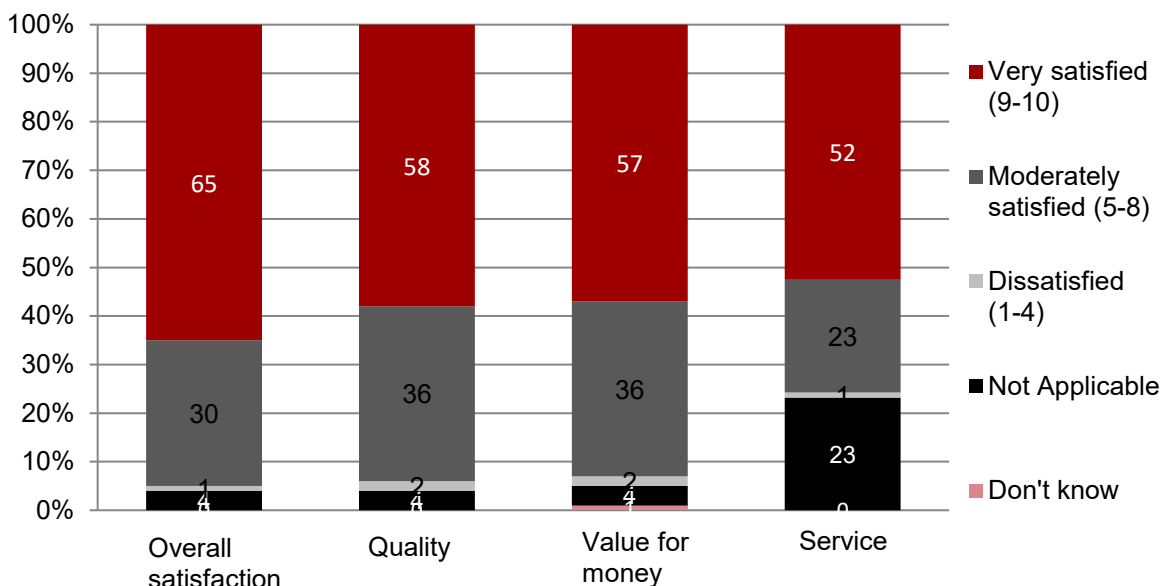


*Base: 2019 Wales Visitor Survey – UK staying visitors Stage II who stayed in commercial accommodation in Wales (1,145)*

- 3.82 When asked about their satisfaction with the accommodation booked in Wales, two thirds of UK visitors who had stayed in paid accommodation (65%) were very satisfied overall. Another three in ten were moderately satisfied and just 1% were dissatisfied (see Figure 3.17).
- 3.83 Those staying in self-catering accommodation or a guesthouse/B&B were much more likely to be very satisfied with their accommodation than those staying in a hotel in Wales (at 72% and 70% respectively, compared with 55% for hotels).

3.84 Satisfaction with the quality, value for money and service received at the commercial accommodation used was also high, with the proportion very satisfied on each dimension ranging from 58% to 52%.

**Figure 3.17: Satisfaction with accommodation in Wales 2019 - %**



Base: 2019 Wales Visitor Survey – UK staying visitors Stage II who stayed in commercial accommodation in Wales (1,145)

3.85 Average satisfaction scores for each dimension have risen since 2016 (see Table 3.4).

**Table 3.4: Average satisfaction with accommodation, 2019 c.f. 2016**

Mean scores	Trends over time	
	2019	2016
Overall satisfaction with accommodation	8.9	8.6
Quality	8.7	8.4
Value for money	8.7	8.5
Service	8.9	8.7

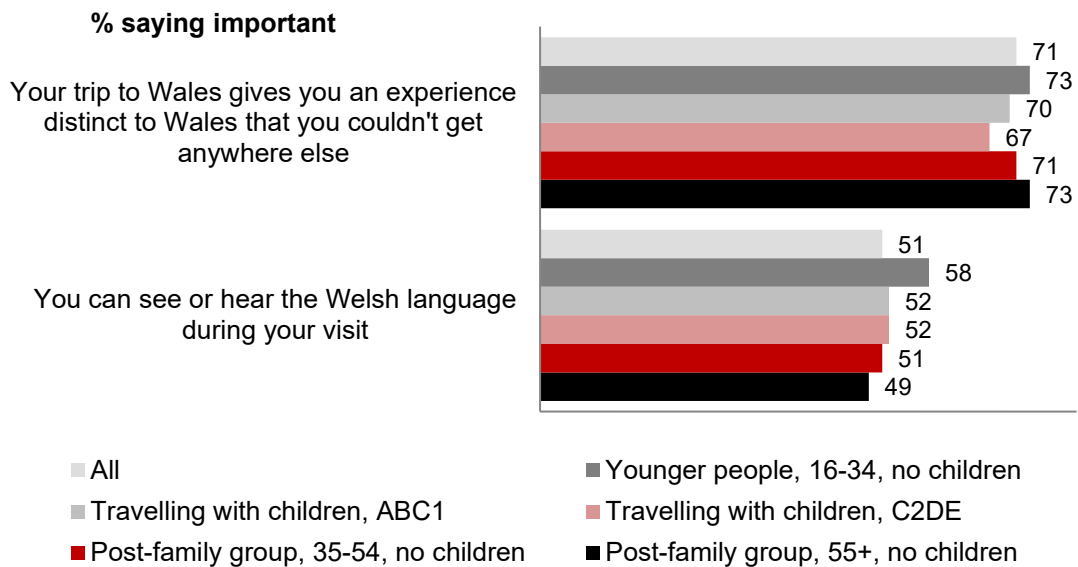
Base: Wales Visitor Survey – UK staying visitors Stage II who stayed in commercial accommodation in Wales (2019 - 1,145; 2016 – 1,152)

Table notes: Mean score scale: 1 = very dissatisfied; 10 = very satisfied; mean scores exclude 'Don't know'

## Sustainability and sense of place

- 3.86 Over nine in ten UK staying visitors (94%) consider Wales to be a sustainable tourism destination for holidays and breaks, with most visitors overall (72%) strongly agreeing that it is. This represents a marked increase from the levels seen in previous years (with 50% strongly agreeing in 2016 and 55% in 2013). The *Post-family group, 55+, no children* segment was most likely to agree strongly.
- 3.87 When prompted with a list and asked whether their visit to Wales included any of these aspects that were distinctively Welsh or had a particular local character, the majority of UK staying visitors (78%) were able to single out something that was distinctively Welsh about their trip. Only 22% could not. As in 2016, **heritage sites** and **visitor attractions** were most often mentioned (in 2019 by 43% of visitors each), followed by **food and drink** (selected by 36%) and **outdoor activities** (24%).
- 3.88 The majority of UK staying visitors were looking for an experience in Wales that they could not have anywhere else – 71% regarded it as important that their trip to Wales was distinctively Welsh, while only 27% did not.
- 3.89 Sense of place was most important to the *Younger people, 16-34, no children* and the *Post-family group, 55+, no children* segments. In contrast, it was least important to the *Travelling with children, C2DE* group (see Figure 3.18).
- 3.90 At the same time, UK staying visitors' opinions were split on the importance of being able to see or hear the Welsh language during their visit to Wales - 51% regarded it as important, while 48% did not. Visitors from Wales were slightly more likely to feel it was important than visitors from England or other UK countries.
- 3.91 The *Younger people, 16-34, no children* segment was most likely to want to hear the Welsh language during their visit.

**Figure 3.18: Importance of distinctive elements of visit 2019, by marketing segment**

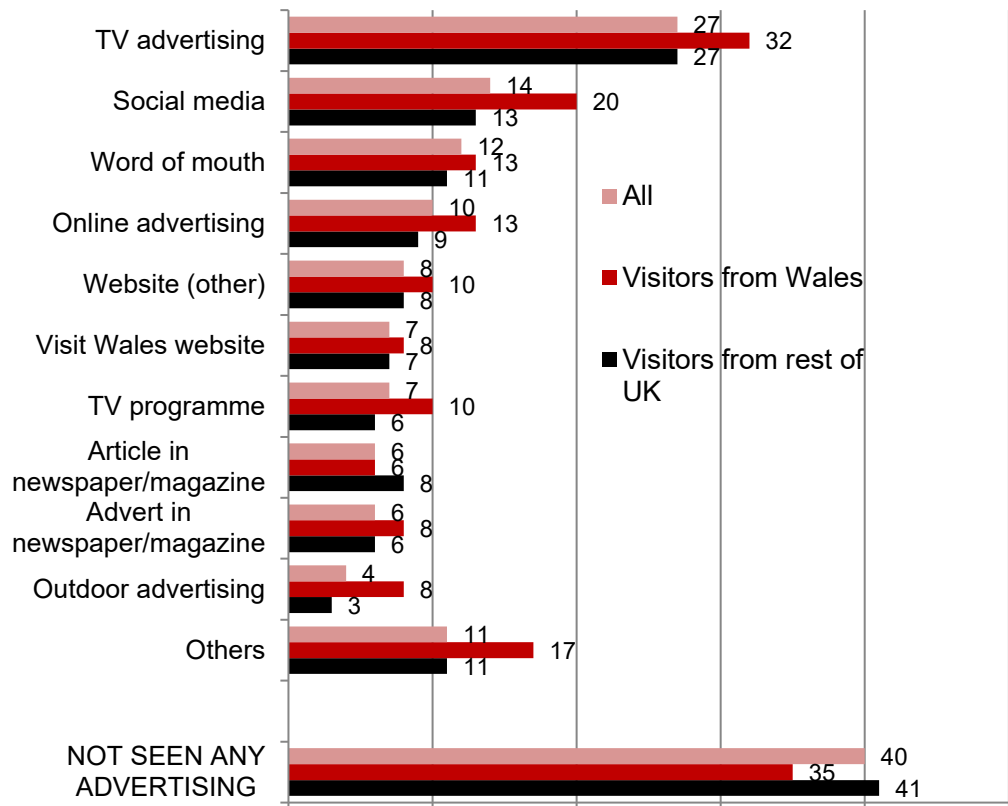


Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)

### Marketing recall and holiday planning

- 3.92 Six in ten UK staying visitors in 2019 (60%) had seen some advertising, marketing or communications about Wales before their trip, down from 66% in 2016 (see Figure 3.19).
- 3.93 The most commonly-recalled channel was TV advertising (mentioned by around one in four UK staying visitors overall). This has fallen from a level of 41% in 2016. Social media communications (e.g. Facebook and Twitter) were recalled by 14%, while 12% remembered seeing online advertising. Both have increased since 2016 (at 9% and 7% respectively). 12% had heard Wales mentioned or recommended by other people. Mentions of the Visit Wales website are down from 2016 (now 7%, down from 14% in 2016).
- 3.94 Staying visitors from Wales were more likely than staying visitors from other UK countries to have seen almost all of these types of marketing, particularly social media, TV advertising and online advertising.

**Figure 3.19: Prompted recall of advertising, marketing and publicity for Wales pre-visit, by visitor origin - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage I (3,103)

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

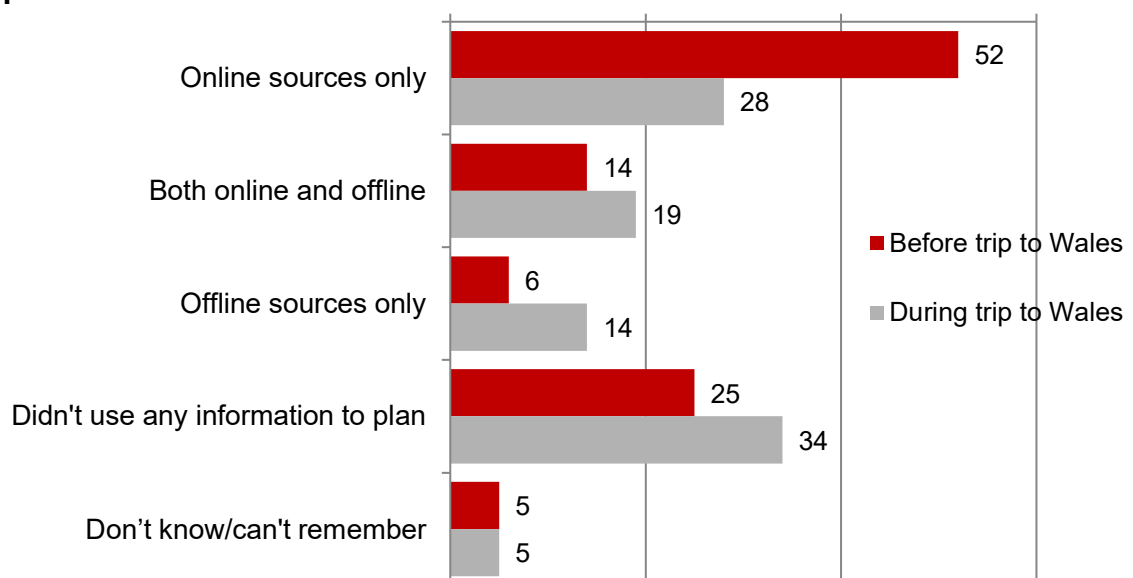
- 3.95 6% of UK staying visitors had heard of ‘The Wales Way’ campaign. Awareness was highest (at 10%) among those aged 65 and over. Among those aware, the majority said it had made no difference to their decision to visit Wales, but it did influence the decision of 15% of those who had seen it. This equates to almost 1% of UK staying visitors overall.
- 3.96 11% of UK staying visitors had seen advertising, marketing or publicity for ‘Year of Discovery 2019’, rising to 14% of visitors from Wales. While it had made no or little difference to their decision to visit for two-thirds of those aware, it had influenced one in three of those who had seen it to some extent (or 3% of UK staying visitors overall).
- 3.97 Seven in ten UK staying visitors (70%) used some information sources to help plan their trip to Wales: just over half of visitors (52%) only used online sources such as websites and apps when information gathering (around the



same level as in 2016 – 50%), while another 14% used both online sources and offline sources such as brochures and leaflets (down from 21% in 2016). Only 3% of visitors only used sources of information not found on the internet in 2019 pre-visiting Wales (down from 6% in 2016) (see Figure 3.20).

3.98 Although information use was lower during their stay, around six in ten UK staying visitors (61%) did look for information while in Wales – 34% did not. Among those who did, almost three in ten (28%) only used online sources of information (up from 21% in 2016), while 19% used both online and offline information (up from 14% in 2016). 14% only used offline sources (down from 24% in 2016).

**Figure 3.20: Holiday planning: information sources used before and during trip to Wales 2019 - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)

3.99 Websites were used for planning their trip to Wales by the majority of online information users in 2019 (94%). Another 9% said they used social media and apps, while 7% used email. Social media and apps were most likely to be mentioned by the *Younger people, 16-34, no children* segment.

3.100 Search engines such as Google were most commonly-mentioned by those who used websites to plan their trip (mentioned by around half of this group – 51%). Around one in six mentioned accommodation booking sites (such as LateRooms.com, Expedia, Booking.com and Airbnb) (17%), review sites

such as TripAdvisor and Google Places (16%) and the Visit Wales website (15%).

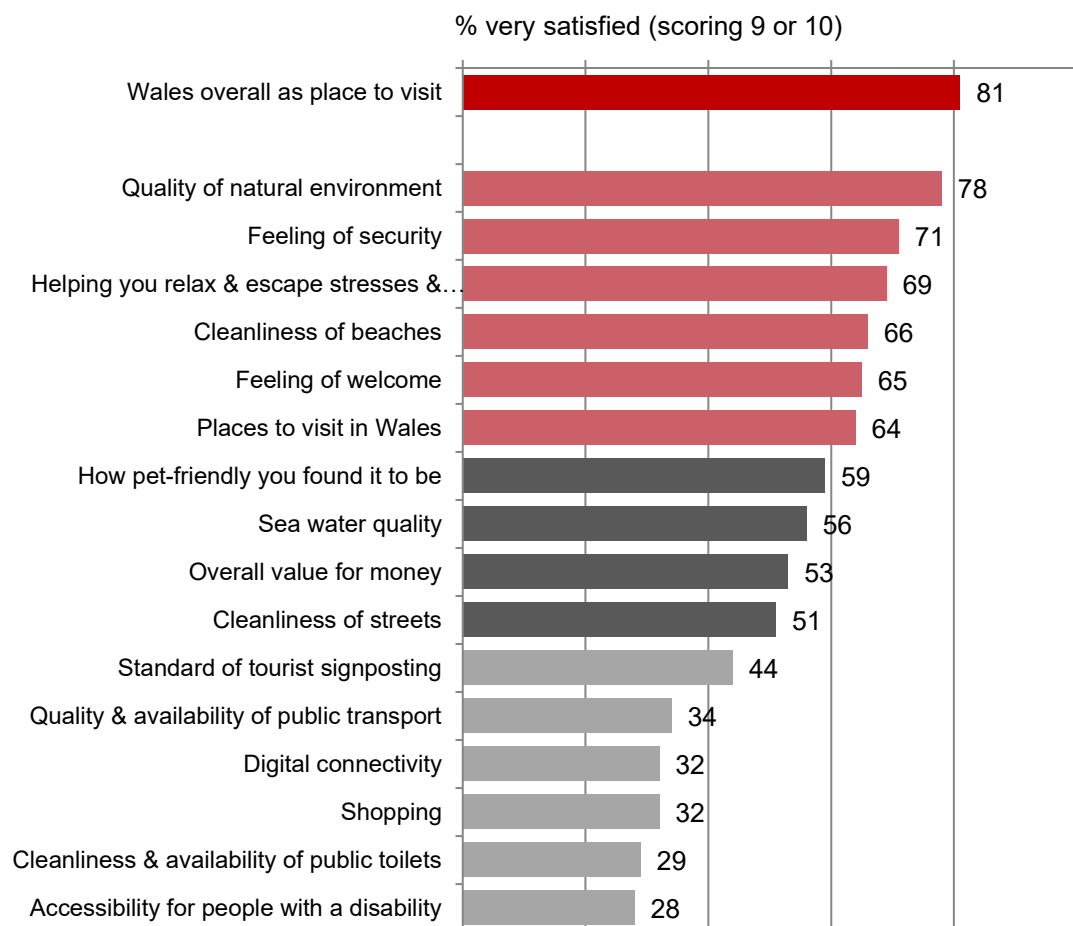
- 3.101 Google and search engines also dominated for information gathering during their trip to Wales (mentioned by 63% of those who had used online information sources). As well as review sites and the Visit Wales website (mentioned by 12% and 10% respectively), visitors were also likely to use navigation sites such as Google maps and the AA Route Planner (used by 10%).

### **Satisfaction with overall visit experience**

- 3.102 Around eight in ten (81%) of UK staying visitors in 2019 were very satisfied with **Wales overall as a place to visit**. The average satisfaction score of 9.3 is almost unchanged from previous years (9.2 in 2016 and 9.3 in 2013). No major differences were evident in the satisfaction levels of peak vs shoulder period visitors, by demographics or by marketing segment.
- 3.103 As in previous years, satisfaction was highest with the **quality of the natural environment in Wales** (with 78% very satisfied). Other dimensions of the visitor experience which scored highly were the **feeling of security, helping you relax from the stresses and strains of life, the cleanliness of beaches, the feeling of welcome and places to visit**. All were rated a 9 or 10 by at least two in three UK staying visitors who expressed a view in 2019.
- 3.104 While satisfaction was generally high, satisfaction was lowest with Wales' **accessibility for people with a disability, the cleanliness and availability of public toilets, shopping, digital connectivity and the quality and availability of public transport**. Between 28% to 34% of visitors expressing an opinion were very satisfied with Wales on any of these dimensions.
- 3.105 The highest dissatisfaction was evident for **digital connectivity and the quality and availability of public transport**, with 12% and 10% of UK staying visitors who expressed an opinion dissatisfied with each (that is, scoring each between 1 and 4 out of 10).

3.106 Figure 3.21 illustrates UK staying 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 3.21: Satisfaction with visit to Wales 2019**



*Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642); 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)*

3.107 The small minority of staying visitors who rated Wales 7 out of 10 or lower as a place to visit (4%) were asked what would have improved their experience or encouraged them to give a higher score, apart from the weather.

3.108 Despite this, rain/bad weather was still the most-mentioned factor, cited spontaneously by 11% of these visitors. Other suggestions included more advertising of what's on (mentioned by 8%), improvements to the transport infrastructure (7%) and more activities, especially in bad weather (6%). 5% respectively mentioned it was difficult to find nice restaurants and that town

centre environments could be improved (with better shopping or more regeneration), while 4% cited issues with access for people with disabilities.

3.109 Some comments from less satisfied UK staying visitors include:

*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 to. You have to make people more aware it.*

*Cleanliness, more public toilets, better bus services, more places to visit without spending a small fortune and decent public parks for the kids, there's nothing for the kids.*

*Cheaper parking. Could be better toilet facilities. Up the top of Snowdon I had to take my granddaughter into the Men's [toilet] because 20 women were waiting.*

*Drawing on experience visiting North Wales and being from mid-Wales, the quality of cafes and independents there leaves quite a lot to be desired, the food is ordinary. Whereas, having lived in the South West, there is a better range of cafes, offering more high-quality foods like artisan breads for example. This could be improved by encouraging more innovative and interesting foods in cafes.*

*I think there's a missed opportunity as, for instance, a Dragon's Trail or a Druid's Trail that connects Welsh history for people with a particular interest in any field. Also we found it difficult for vegetarian and vegan needs together.*

*Parking issues and finding nice restaurants is difficult.*

*The impression in the old part of town is depressing and impoverished.*

*We had a wheelchair. It was difficult to access any premises. Nobody provided ramps to get in and out, we were very limited in where we could eat or drink or stay. Lots of access for dogs but none for humans!*

*Transport links between places in Wales could be improved, for example travelling from Mid Wales to Cardiff you have to travel into England then come back in again.*

*Accessibility, infrastructure, mobile signal.*

3.110 Reflecting the generally high overall satisfaction levels among UK staying visitors, the trip to Wales exceeded expectations for almost six in ten visitors (55%). This is consistent with previous years (53% in 2016; 57% in 2013). For just over four in ten visitors in 2019 (43%), the trip met their expectations.

None of those interviewed said their trip to Wales was less good than expected.

- 3.111 New visitors and the *Younger people 16-34, no children* segment were most likely to say their trip was better than expected (at 73% and 72% respectively, compared with 55% overall).

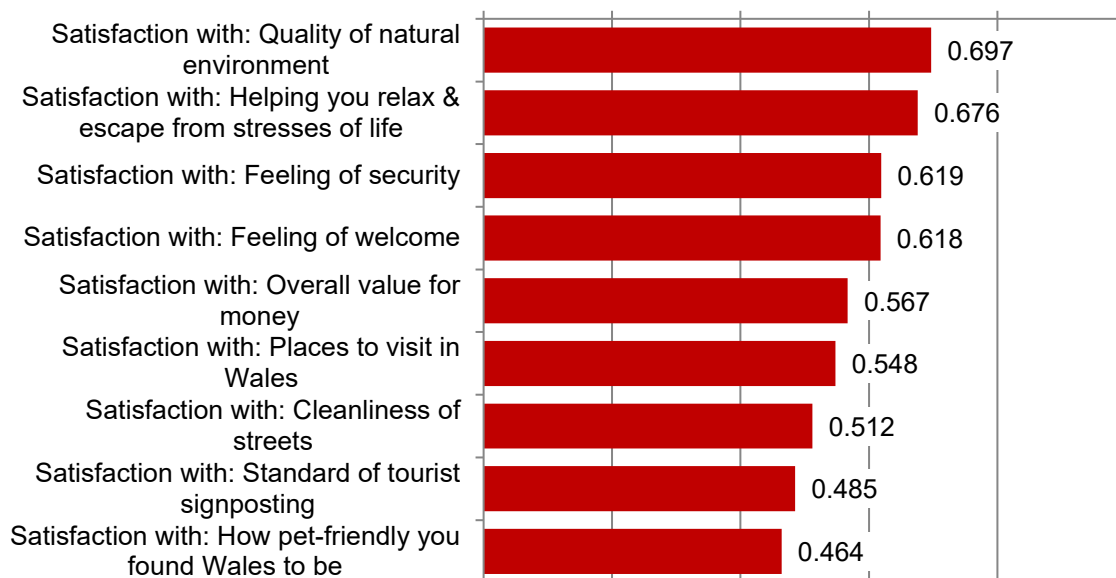
### **Influences on satisfaction**

- 3.112 Supplementary multivariate analysis of the data<sup>16</sup> was carried out for UK staying visitors, which aimed to examine and identify trends and associations between variables, where the relationships are influences on satisfaction, re-visiting and recommendation.
- 3.113 This analysis identified key drivers of overall satisfaction with Wales but was unable to identify drivers for re-visiting and recommendation. A spread of ratings is needed to examine relationships successfully, but a very high proportion (81%) of UK staying visitors are in the top two satisfaction boxes for overall satisfaction. The same is true for re-visiting and recommendation, with 83% saying they will definitely visit again in the next few years and 95% that they will definitely recommend Wales as a place to visit. As a result, there are relatively small numbers of respondents who are not in the top box/top two boxes, which makes it unlikely the analysis can successfully explain the drivers.
- 3.114 Turning to influences on visitor satisfaction, the analysis identified that the key drivers of satisfaction with Wales as a place to visit were a variety of factors relating to aspects of the visit: in particular the **quality of the natural environment, helping you relax and escape from the stresses of life**, the **feeling of security** and the **feeling of welcome** (see Figure 3.22 below). All other attitudinal dimensions within the survey were much less important in influencing visitor satisfaction.

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<sup>16</sup> See Annex D for an explanation

**Figure 3.22: Key drivers of overall satisfaction with Wales 2019**



*Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)  
 Note: for an explanation of the values, see footnote<sup>17</sup>*

### Likelihood of coming back and of recommending Wales

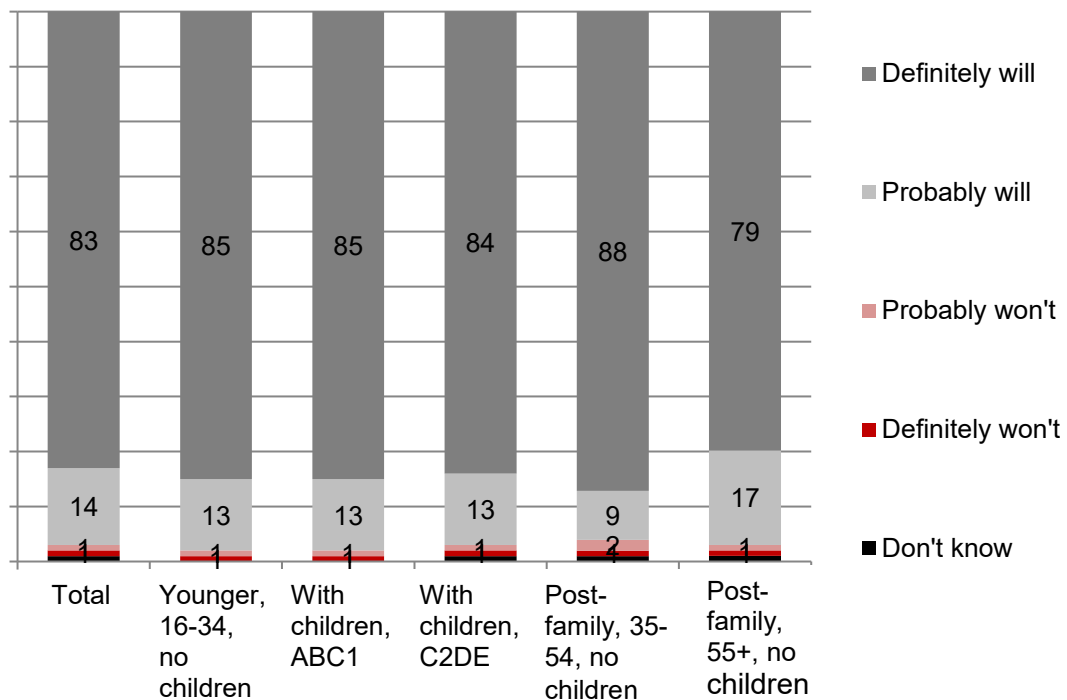
3.115 97% of UK staying visitors said they were likely to make another visit to Wales in the next few years, with 83% overall saying they would definitely come back. Only 2% said they probably or definitely would not re-visit Wales. The proportion of visitors saying they will definitely make another visit has risen since 2016 (79%).

3.116 While most new visitors were likely to visit Wales again, the proportion of this group likely to come back was lower than among repeat visitors (at 92% compared with 98% respectively).

<sup>17</sup> The list contains the original variables that contribute significantly to this factor. The numbers are the correlations between the factor and the contributory variables to the factor. This represents how much they each ‘make up’ the factor as a combined variable. In this case quality of natural environment contributes the most, and how pet friendly visitors found Wales to be the least, but all 9 variables are important contributors. It is the first of 8 factors identified from all the scalar variables that contribute significantly to overall satisfaction. When these factors are entered into a multiple regression to predict overall satisfaction, this factor predicts much more than any of the other factors. This tells us that these 9 variables, combined together as a factor (new variable), are the best predictors of overall satisfaction.

3.117 *Post-family group, 35-54, no children* were most likely to say they would definitely make another trip to Wales (at 88%), while the *Post-family, 55+, no children* segment were the least (at 79%) (see Figure 3.23).

**Figure 3.23: Likelihood of coming back to Wales 2019 by marketing segment - %**



Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)

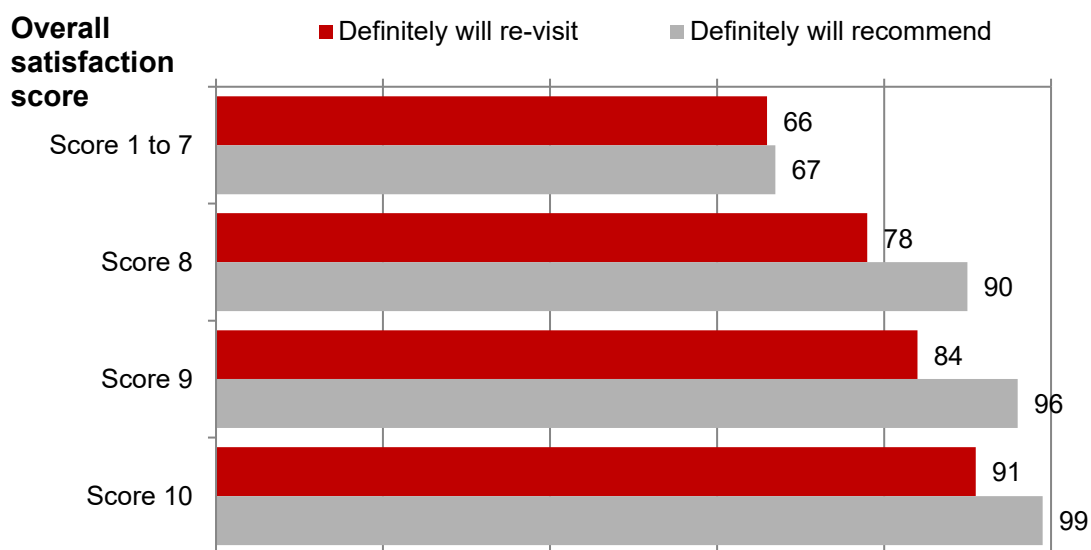
3.118 Staying visitors were also asked (for the first time) how likely they were to come to Wales **for a day trip** in the next few years. Visitors were almost equally split, with 49% saying they would make a day visit in future and 50% saying they would not.

3.119 Geographic proximity is likely to have an influence. While 96% of staying visitors from Wales said they would definitely or probably come to Wales for a day trip in future, only 41% of staying visitors from other UK countries said this.

3.120 *Younger people, 16-34, no children* were the most likely of all marketing segments to say they would return for a day trip (at 58% compared with 49% overall), while *Post family group, 55+, no children*, were the least likely (at 46%).

- 3.121 Reflecting the high levels of visitor satisfaction and the strong likelihood of returning to Wales in future, almost all UK staying 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 higher than the level of definite recommendation seen in 2016 and close to the 2013 level (at 92% and 96% respectively).
- 3.122 Recommendation was very high across all visitor types, demographics and marketing segments.
- 3.123 There is a clear relationship between overall satisfaction and likelihood of re-visiting and recommendation; the proportion of UK staying visitors likely to come back to Wales and the proportion likely to recommend Wales increase as overall visitor satisfaction increases (see Figure 3.24).

**Figure 3.24: Overall satisfaction and likelihood of re-visiting / recommending Wales 2019 - %**



*Base: 2019 Wales Visitor Survey – all UK staying visitors Stage II (1,642)*



## 4. Conclusions

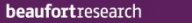
- 4.1 While the age profile of UK staying visitors to Wales remains older than that of the UK population, Wales is attracting more under 55s now than in the past. One of the key motivators for 16-34s visiting Wales is to take part in outdoor and sporting activities, suggesting that Visit Wales' promotion of activity tourism and adventure holidays is having an effect.
- 4.2 Younger people are most likely to be new visitors to Wales, but the proportion of first-time visitors in 2019 has fallen to around one in four. Recall of any advertising, marketing or communications about Wales has also dropped (in particular, TV advertising and mentions of the Visit Wales website). This suggests that recent marketing has had less impact than earlier campaigns promoting Wales as a place to visit.
- 4.3 As in previous years, the majority of UK staying visitors come to Wales for a short break or additional holiday and stay in one location. There is an opportunity therefore to encourage more staying visitors (particularly from certain segments – *Younger people, 16-34, no children* and *Post-family group, 35-54, no children*) to tour around and see different parts of the country – only 15% did so in 2019. This could perhaps be achieved by the promotion of regional trails or tourism routes. The recent 'Wales Way' initiative promoting a family of national routes addresses this issue, with 6% of UK staying visitors aware of it.
- 4.4 While Wales is seen as a sustainable tourist destination by visitors, use of private vehicles dominates both in terms of travelling to Wales for their trip and in travelling around while on holiday.
- 4.5 2019 sees some changes in the accommodation choices of staying visitors from the UK. For the first time, self-catering accommodation was more popular with staying visitors than hotels (although the use of hotels has been declining gradually over the past nine years). This is likely to be driven by the rise of Airbnb and other online accommodation marketplaces.
- 4.6 In terms of the booking process, use of third-party accommodation sites such as Booking.com, Expedia and LateRooms.com is still rising among UK

staying visitors. Moreover, online user ratings on sites such as TripAdvisor are more important to UK staying visitors in deciding where to book than official gradings or the star ratings of accommodation in Wales.

- 4.7 Digital information continues to grow in importance, both in visit planning before the trip and during their stay. Two thirds of UK staying visitors go online to help plan their trip; while half go online while on holiday in Wales to look for information. The increase in the use of online information sources while on holiday helps explain the low satisfaction with digital connectivity in Wales (which only a third of visitors were very satisfied with).
- 4.8 Although Wales is rated very highly overall by UK staying visitors as a place to visit, the survey highlights some areas where the visitor experience could be enhanced. Areas where visitor satisfaction is relatively low are accessibility for people with a disability, the cleanliness and availability of public toilets, shopping, digital connectivity and the quality and availability of public transport. All of these (except digital connectivity – added in 2019) have been identified as issues in previous surveys.
- 4.9 While visitor satisfaction was high with Welsh attractions, satisfaction was lower with the eating out experience in Wales, in particular with the use of local or Welsh produce on the menu and with the range of places to eat.
- 4.10 Those who were less than very satisfied with Wales overall as a place to visit (that is, scoring Wales lower than an 8 out of 10) also made some suggestions on areas to improve: more advertising or promotion of what's on, better transport infrastructure, more activities (especially in bad weather), a lack of good restaurants / food options and improving town centre environments.
- 4.11 Welsh tourism plays a key role in facilitating wellbeing – the main prompted factor endorsed by UK staying visitors in attracting them to come to Wales was to help them relax and escape from the stresses of life. Moreover, helping people get away from it all is one of the key drivers of satisfaction with Wales as a place to visit (alongside the quality of Wales' natural environment).

**Annex A**

Stage 1 questionnaire

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

### 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><b>S1</b> Firstly, do you speak Welsh? <b>IF YES</b> (10) is that?</p> <p>Yes – fluently..... 1 → <b>S2</b>  Yes – but not fluently..... 2 → <b>S2</b>  No..... 3 → <b>S3</b></p>	<p><b>Q1</b> How many nights in total will you be staying in Wales? <b>WRITE IN</b></p> <p>_____ (14-15)</p>																						
<p><b>(IF WELSH SPEAKER)</b></p> <p><b>S2</b> We can conduct this interview in (11) English or Welsh – which would you prefer?</p> <p>English..... 1  Welsh..... 2</p>	<p><b>Q2</b> (ASK ALL) And are you visiting today with any pets? (16) <b>CAN MULTI-CODE</b></p> <p>Yes – dog/s 1  Yes – other pet/s 2  No 3</p>																						
<p><b>(ASK ALL) - SHOWCARD A</b></p> <p><b>S3</b> Which of these best describes the (12) reason for your trip here today?</p> <p>Part of a holiday, <b>staying</b> in Wales away from home..... 1 → <b>Q1</b>  Part of a holiday to visit friends or relatives, <b>staying</b> in Wales away from home..... 2 → <b>Q1</b>  <b>Day visit</b> to / in Wales – for a day trip / outing / non-routine visit..... 3 → <b>S4</b>  Day visit to / in Wales – for routine business or routine shopping..... 4 <b>THANK AND CLOSE</b>  On business..... 5 <b>AND CLOSE</b>  For study..... 6 <b>CLOSE</b>  Other..... 7</p>	<p><b>Q3</b> 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><b>(IF DAY VISITOR S3 – CODE 3)</b></p> <p><b>S4</b> Can I just check, will you be spending (13) <b>three hours or more</b> away from home or your accommodation as part of your visit today – including travel?</p> <p>Yes..... 1 → <b>Q2</b>  No..... 2 → <b>CLOSE</b></p>	<p><b>CHECK QUOTAS AND CONTINUE</b></p> <p><b>(IF LIVE IN WALES)</b></p> <p><b>Q4</b> 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><b>Q5 (IF LIVE OUTSIDE OF WALES)</b></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><b>Q11 Working status</b> (36)</p> <p>Working full time (30+ hrs per week)..... 1</p> <p>Working part time (&gt; 29 hrs per week).... 2</p> <p>Full time education..... 3</p> <p>Retired..... 4</p> <p>Looking after the home..... 5</p> <p>Full time carer..... 6</p> <p>In training..... 7</p> <p>Other..... 8</p>
<p><b>Q6 (IF LIVE IN WALES)</b></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><b>Q12 Status in household</b> (37)</p> <p><b>READ OUT</b> - 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><b>Q7 (ASK ALL) – SHOWCARD B</b></p> <p>Which of the following best describes your party on this visit? (24)</p> <p><b>SINGLE CODE</b></p> <p>Visiting alone..... 1</p> <p>A couple..... 2</p> <p>Family – with young children..... 3</p> <p>Family – with older children..... 4</p> <p>Family – with young and older children..... 5</p> <p>Family – without children..... 6</p> <p>Friends..... 7</p> <p>Organised group / society..... 8</p> <p>Other..... 9</p>	<p><b>Q13 Occupation of Chief Income Earner</b></p> <p>(last job if retired)</p> <p>Actual job</p> <p>_____</p> <p>Position / grade</p> <p>_____</p>
<p><b>Q8</b></p> <p>How many people are in your visitor party today, including yourself?</p> <p><b>WRITE IN NO. OF ADULTS &amp; CHILDREN</b></p> <p>Adults:</p> <p>Children:</p>	<p><b>Q14 Social grade</b> (38)</p> <p>AB..... 1</p> <p>C1..... 2</p> <p>C2..... 3</p> <p>DE..... 4</p>
<p><b>Q9 Gender</b> (31)</p> <p>Male..... 1</p> <p>Female..... 2</p> <p>Other ..... 3</p> <p>Prefer not to say..... 4</p>	<p><b>Q15 SHOWCARD C</b></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><b>Q10 Age</b> (32)</p> <p><b>PLEASE WRITE IN EXACT AGE</b> _____</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><b>SHOWCARD D</b></p> <p><b>Q16</b> Do you or does anyone else in your party have any of the following conditions or impairments? You can tell me the letter next to each one if you prefer.</p> <p><b>CAN MULTI-CODE</b></p> <p><b>A</b> Mobility impairment (wheelchair user)..... 1</p> <p><b>B</b> Mobility impairment (non-wheelchair user)..... 2</p> <p><b>C</b> Blind..... 3</p> <p><b>D</b> Partially sighted..... 4</p> <p><b>E</b> Deaf..... 5</p> <p><b>F</b> Partial hearing loss..... 6</p> <p><b>G</b> Learning difficulties..... 7</p> <p><b>H</b> Long-term illness (e.g. AIDS, arthritis, cancer, diabetes)..... 8</p> <p>None of these ..... 9</p>	<p><b>Q18</b> 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><b>SHOWCARD E</b></p> <p><b>Q17</b> Have you seen or heard any of these types of advertising, marketing and publicity for Wales before your visit today?</p> <p><b>CAN MULTICODE</b></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><b>SHOWCARD F</b></p> <p><b>IF YES TO Q18</b></p> <p><b>Q19</b> To what extent did The Wales Way influence your decision to visit Wales? <b>Scale of 1-10</b></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>

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

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

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

Preferred telephone number: \_\_\_\_\_ Back-up telephone number \_\_\_\_\_

**IF USA – RECORD STATE THEY LIVE IN:** \_\_\_\_\_

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

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

<b>Signature</b>	<b>Date of interview:</b>
------------------	---------------------------

<b>WRITE IN YOUR INTERVIEWER NUMBER</b> $\longrightarrow$		(54)	(55)	(56)
-----------------------------------------------------------	--	------	------	------

<b>B01919</b>	<b>Accompanied</b>	Yes    1	No     2	<b>Supervisor signature:</b>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;"><b>QUOTA</b></td> <td style="text-align: right; padding: 2px;">(57)</td> </tr> <tr> <td style="padding: 2px;">UK DAY</td> <td style="text-align: right; padding: 2px;">1</td> </tr> <tr> <td style="padding: 2px;">UK STAYING</td> <td style="text-align: right; padding: 2px;">2</td> </tr> <tr> <td style="padding: 2px;">OVERSEAS STAYING</td> <td style="text-align: right; padding: 2px;">3</td> </tr> <tr> <td style="padding: 2px;">OVERSEAS DAY</td> <td style="text-align: right; padding: 2px;">4</td> </tr> </table>	<b>QUOTA</b>	(57)	UK DAY	1	UK STAYING	2	OVERSEAS STAYING	3	OVERSEAS DAY	4
<b>QUOTA</b>	(57)														
UK DAY	1														
UK STAYING	2														
OVERSEAS STAYING	3														
OVERSEAS DAY	4														

**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**

	<b>Q7</b>	<b>Q8</b>
	<b>Column A</b>	<b>Column B</b>
	(Single)	(Multi)
Private car or van		
Hired car or van		
Train		
Public bus or coach		
Private bus/coach excursion/tour		
Bike		
Motorbike		
On foot		
Taxi		
Water taxi or bus		
Boat or yacht		
Campervan or tourer		
Ferry – car passenger		
Ferry – foot passenger		
Plane ( <b>specify arrival airport</b> )		
Other ( <b>please specify how and where arrived</b> )		
Don't know / can't remember		

## SECTION 3 – ACTIVITIES UNDERTAKEN & 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.

	<b>Q25a)</b>	<b>Q25b)</b>
	<b>Official grading or star rating</b>	<b>Scores given by other travellers</b>
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
2. Places to visit in Wales
3. Quality of the natural environment
4. Shopping
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

15. Digital connectivity, e.g. mobile phone signal, availability of wifi
16. Helping you relax and escape from the stresses of life
17. Wales overall as a place to visit →  
**ALWAYS COMES AT THE END OF THE LIST**

**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**

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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**

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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	

## Interviewing locations

Region	Location/ attraction	Partner buy-in organisation (if applicable)
West Wales	Aberdulais Falls Afan Forest Park Fishguard Town Centre Margam Park National Botanic Garden of Wales National Waterfront Museum Newton House, Dinefwr Pembrey Country Park Rhossili, Gower St David's Town Centre Tenby Town Centre	
South Wales	Abergavenny Town Centre Barry Island Seafront Big Pit National Mining Museum Brecon Mountain Railway Bryn Bach Park Caerleon Roman Baths Caerphilly Castle Cardiff Castle Castell Coch Chepstow Town Centre Cosmeston Country Park Cwmcarn Forest Drive	Monmouthshire County Council
	Dare Valley Country Park Garwnant McArthurGlen Monmouth Town Centre National Museum Cardiff	Rhondda Cynon Taf County Borough Council Natural Resources Wales Bridgend Council Monmouthshire County Council
	Penarth Pier Porthcawl Promenade Rhondda Heritage Park Rock UK Summit Centre Royal Mint Experience St Fagan's National History Museum Tintern Abbey Tredegar House Wales Millennium Centre/ Bay	Vale of Glamorgan Council

## **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 staying 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>	<b>3,103</b>	162	234	199	144	97	185	150	445	288	298	111	570	220
<b>Visitor origin</b>														
Wales	<b>14</b>	12	17	13	24	29	34	7	19	13	7	11	7	5
England	<b>84</b>	85	82	84	74	68	66	89	80	86	91	88	90	95
Scotland/NI	<b>1</b>	4	1	3	2	3	0	3	1	1	2	1	2	0
<b>Age</b>														
16 - 34	<b>16</b>	14	18	16	26	14	22	18	15	17	16	14	14	16
35 - 54	<b>44</b>	38	45	35	34	46	48	50	49	28	44	31	56	32
55+ years	<b>39</b>	48	38	50	41	39	30	32	36	56	40	55	30	52
<b>Gender</b>														
Male	<b>41</b>	33	47	39	31	37	44	39	42	46	45	30	43	35
Female	<b>59</b>	67	53	61	69	62	56	61	58	54	55	70	57	65
<b>Social grade</b>														
ABC1	<b>73</b>	77	72	76	64	74	70	78	70	73	78	74	78	65
C2DE	<b>27</b>	23	28	25	36	27	30	22	29	27	22	26	22	34
<b>Ethnicity</b>														
White	<b>97</b>	92	96	96	99	96	98	92	98	99	97	98	97	98
Non-white /other	<b>2</b>	8	4	4	2	4	4	8	2	1	2	2	2	1

Base: all UK staying visitors 2019 – Stage I (3,103)

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

Table notes (continued): Key to marketing regions:

<b>Cardiff</b>	Cardiff, capital of Wales	<b>Cered'n</b>	Ceredigion / Cardigan Bay
<b>Valleys</b>	South Wales Valleys	<b>Mid Wales</b>	Mid Wales and Brecon Beacons
<b>Wye Valley</b>	Wye Valley and Vale of Usk	<b>Angl'y</b>	Isle of Anglesey
<b>Glam HC</b>	Glamorgan Heritage Coast	<b>NE Wales</b>	North East Wales
<b>Carms</b>	Carmarthen	<b>Snow'a</b>	Snowdonia Mountains and Coast
<b>Pembs</b>	Pembrokeshire	<b>Lland'no</b>	Llandudno and Colwyn Bay
<b>Swans Bay</b>	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>	<b>1,642</b>	162	234	199	144	97	185	150	445	288	298	111	570	220
To enjoy the landscape/ countryside/ beach	<b>42</b>	13	31	37	30	38	55	40	51	42	49	34	42	43
To take part in outdoor or sporting activities	<b>18</b>	2	16	7	7	19	14	18	12	21	19	16	34	10
To visit friends or relatives	<b>13</b>	23	27	18	35	15	7	20	16	11	9	6	6	9
To visit places/ historical & religious sites/ attractions	<b>11</b>	17	14	19	7	13	8	8	8	13	9	13	11	17
To attend an event/ concert/ sporting event	<b>4</b>	17	1	7	5	3	2	5	1	1	1	18	2	7
For a city break/ visit a large town	<b>2</b>	17	0	0	2	1	0	2	2	2	1	2	0	1
To attend a special event e.g. wedding	<b>2</b>	3	2	3	5	1	2	2	0	1	1	2	1	0

Base: all UK staying visitors 2019 – Stage II (1,642)

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



**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>	<b>1,642</b>	162	234	199	144	97	185	150	445	288	298	111	570	220
<b>Wales overall as place to visit</b>	<b>9.3</b>	<b>9.2</b>	<b>9.4</b>	<b>9.3</b>	<b>9.3</b>	<b>9.2</b>	<b>9.5</b>	<b>9.2</b>	<b>9.4</b>	<b>9.3</b>	<b>9.4</b>	<b>9.5</b>	<b>9.3</b>	<b>9.4</b>
Quality of natural environment	<b>9.3</b>	8.7	9.1	9.2	8.8	9.3	9.3	9.3	9.2	9.3	9.3	9.3	9.4	9.3
Feeling of security	<b>9.1</b>	8.5	8.9	9.1	8.9	9.2	9.1	9.1	9.1	9.2	9.1	9.0	9.1	9.2
Helping you relax....	<b>9.0</b>	8.5	9.0	8.9	8.8	9.0	9.2	8.8	9.1	9.1	9.0	9.1	9.1	9.3
Cleanliness of beaches	<b>8.9</b>	8.9	8.8	8.7	8.8	9.1	9.1	8.9	8.9	8.9	9.0	8.6	8.8	9.0
Feeling of welcome	<b>8.9</b>	8.7	8.9	8.8	8.8	8.9	9.1	8.9	8.9	8.9	8.8	9.1	8.9	9.0
Places to visit in Wales	<b>8.9</b>	9.0	8.9	8.9	8.7	8.7	8.8	8.8	8.7	8.9	8.9	9.0	8.9	9.1
How pet-friendly you found it to be	<b>8.6</b>	8.7	8.8	8.6	8.0	9.0	8.3	8.6	8.7	8.7	8.3	8.9	8.5	8.8
Sea water quality	<b>8.6</b>	8.6	8.3	8.3	7.8	8.7	8.9	8.7	8.7	9.0	8.9	8.0	8.5	8.4
Overall value for money	<b>8.6</b>	8.5	8.7	8.6	8.4	8.8	8.7	8.7	8.6	8.8	8.5	8.6	8.6	8.8
Cleanliness of streets	<b>8.5</b>	8.2	8.3	8.6	8.1	8.5	8.6	8.5	8.5	8.5	8.4	8.5	8.6	8.9
Standard of tourist signposting	<b>8.3</b>	8.2	8.1	8.1	8.2	8.4	8.4	7.9	8.3	8.4	8.1	8.2	8.4	8.7
Shopping	<b>7.8</b>	8.5	8.1	8.0	8.2	7.8	7.9	8.0	7.6	7.7	7.2	7.8	7.4	8.2
Quality & availability of public transport	<b>7.4</b>	8.5	7.9	7.3	7.6	6.9	7.6	7.0	7.3	8.0	6.9	7.1	7.1	7.6
Digital connectivity	<b>7.3</b>	8.3	7.2	7.3	8.4	7.1	7.2	7.4	7.1	6.8	7.3	7.4	7.1	7.7

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>	<b>1,642</b>	162	234	199	144	97	185	150	445	288	298	111	570	220
Accessibility for people with a disability	<b>7.6</b>	7.7	7.4	7.3	8.0	7.7	7.9	8.0	7.4	7.3	7.3	7.4	7.3	8.1
Cleanliness & availability of public toilets	<b>7.5</b>	7.4	7.5	7.3	7.1	7.8	7.2	7.7	7.4	7.3	7.4	7.6	7.5	7.9

Base: all UK staying visitors 2019 – Stage II (1,642)

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**

**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>	<b>1,642</b>	162	234	199	144	97	185	150	445	288	298	111	570	220
Service	<b>8.6</b>	8.7	8.7	8.6	8.5	8.5	8.4	8.5	8.6	8.6	8.7	8.5	8.6	8.7
Quality of food	<b>8.4</b>	8.5	8.5	8.2	8.3	8.4	8.5	8.3	8.5	8.4	8.5	8.1	8.4	8.7
Value for money	<b>8.2</b>	8.2	8.5	8.3	8.1	8.1	8.1	8.2	8.3	8.3	8.1	8.2	8.1	8.5
Range of places to eat	<b>8.0</b>	<b>8.8</b>	8.1	7.9	8.0	8.1	8.1	7.9	7.9	7.9	7.9	8.1	7.8	8.1
Use of local or Welsh food on the menu	<b>7.6</b>	7.8	7.6	7.3	<b>7.1</b>	7.8	7.7	7.3	7.9	7.7	7.6	7.4	7.8	7.6

Base: all UK staying visitors 2019 – Stage II (1,642)

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**

**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
<i>Base</i>	<b>3,103</b>	162	234	199	144	97	185	150	445	288	298	111	570	220
TV advertising	<b>27</b>	23	25	28	32	35	26	25	26	27	26	24	28	31
Social media	<b>14</b>	20	15	13	8	16	18	21	12	10	9	11	16	13
Word of mouth	<b>12</b>	10	13	12	6	21	2	7	24	8	7	5	15	7
Online advertising	<b>10</b>	19	13	6	5	16	11	15	9	9	4	4	10	8
Website (other)	<b>8</b>	8	13	7	2	12	4	5	10	7	10	8	8	8
Visit Wales website	<b>7</b>	11	10	10	3	10	3	7	9	7	4	4	8	8
TV programme	<b>7</b>	5	6	8	4	11	3	5	8	9	8	5	8	3
Article in paper/ magazine	<b>6</b>	4	9	4	3	12	4	5	7	9	6	7	6	7
Advert/ flyer in paper/ magazine	<b>6</b>	4	6	5	1	11	5	7	9	3	4	5	5	5
Outdoor advertising	<b>4</b>	8	8	4	2	9	3	3	3	2	3	5	4	2
Others	<b>11</b>	10	17	10	7	23	2	7	21	6	4	10	8	9
<b>Not seen any advertising</b>	<b>40</b>	<b>39</b>	<b>40</b>	<b>36</b>	<b>52</b>	<b>32</b>	<b>50</b>	<b>45</b>	<b>24</b>	<b>45</b>	<b>43</b>	<b>51</b>	<b>37</b>	<b>42</b>

Base: all UK staying visitors 2019 – Stage I (3,103)

Table notes: **Figures in red indicate a marked difference between the marketing region and Wales overall;** Percentages may not add to 100% (more than one response is possible / data is rounded)