Wales Visitor Survey 2019

Overseas Visitors

Mae'r ddogfen yma hefyd ar gael yn Gymraeg

This document is also available in Welsh

Wales Visitor Survey 2019 - Overseas Visitors

Authors: Fiona McAllister, Adam Blunt, Catrin Davies - Beaufort Research

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

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1.   Introduction/Background

Introduction

1.1   Visit Wales, the Tourism arm of the Welsh Government, is one of the co-sponsors of a number of Britain-wide studies designed to determine the volume and value of tourism. The Great Britain Tourism Survey (GBTS)[1], Great Britain Day Visits Survey (GBDVS)[2] and International Passenger Surveys (IPS)[3] are conducted annually with data presented monthly or quarterly.

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

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

The need for research

1.4   Visit Wales therefore commissioned the latest in a series of visitor surveys in 2019, to update findings from 2016 and earlier years and to track any changes in the profile, attitudes and satisfaction of visitors.

1.5   As in previous years, three categories of visitor were covered: UK day visitors, UK staying visitors and overseas visitors.

1.6   The results from the research will be used to provide benchmarks for Visit Wales' development and marketing strategies.

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[1] GB Tourist 2019 report (PDF, 2.8MB)
[2] GB Day Visitor Survey 2019 (PDF, 5MB)
[3] International Passenger Survey 2019 Summary Report

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

Objectives

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

- To profile visitors to Wales (by demographics, age, lifecycle, party size, gender and previous experience of visiting Wales, and by Visit Wales existing market segments for UK and International travellers)

- To analyse visitors' motivations for choosing Wales, such as perceptions, past experiences, proximity, etc.

- To assess details about the current trip (e.g. location, activities undertaken, transport used to and within Wales, accommodation stayed in)

- To investigate attitudes and obtain ratings in respect of the Welsh visitor experience, including systematically for a range of tourism-related facilities and also 'sense of place' and related issues

- To compare pre-visit expectations and attitudes to the actual experience

- To investigate factors such as future intentions to visit and likelihood of recommending Wales

- To profile information used in visit planning, in particular the use of digital information sources

- To investigate the role of tourism and tourism-related activities in facilitating the Welsh Government's Health and Wellbeing agenda.

1.9   This report focuses on the findings for **overseas visitors** – separate reports are available for UK day and UK staying 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[4].

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.

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

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

- 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[5] 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.

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

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[5] **North Wales**: Isle of Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd, Wrexham
Mid Wales: Ceredigion, Powys
South West Wales: Carmarthenshire, Neath Port Talbot, Pembrokeshire, Swansea
South East Wales: Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen, Vale of Glamorgan

- 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[6]. Verbatim comments from online forum posts and diary entries of overseas visitors participating in the qualitative phase have been included in the overseas 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

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[6] https://gov.wales/wales-visitor-survey-2019

- A report focusing on their area.

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[7])

- By Visit Wales international marketing segmentation[8]

- By Welsh region visited.

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

2.27 As with UK staying and day visitors, supplementary multivariate analysis[9] of the data was carried out. This aimed to examine and identify trends and associations between variables, where the relationships are influences on satisfaction, re-visiting and recommendation. No strong attitudinal drivers were identified for overseas visitors for satisfaction, re-visiting or recommendation, so the findings have not been included in this report.

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[7] Defined as follows: Peak – June, July and August; Shoulder – May, September and October
[8] International segments are based on respondents' age and responses to six questions with paired statements (see Annex B Q45). The five segments are:
1 – Adventurers
2 – Buzzseekers
3 – Explorers
4 – Sightseers
5 – Culture Buffs

[9] See Annex D for an explanation

3. Findings

Profile of overseas visitors

3.1 Half of overseas visitors taking part in the Wales Visitor Survey in 2019 were from Europe (50%), as in previous years. Around a quarter came from North America (23%) and a slightly higher proportion from the rest of the world (27%).

3.2 The three years' average 2019 International Passenger Survey data for visitors to Wales show a higher proportion of European visitors (at 65%) and a lower proportion of North American visitors (at 13%), with the remaining 22% from the rest of the world.

3.3 A quarter (25%) of European visitors interviewed in the 2019 Wales Visitor Survey came from Germany, with 19% from the Republic of Ireland and 15% from France. Of the remainder, 8% came from Spain, 7% the Netherlands, 6% Belgium and 3% Italy, while the rest travelled from a variety of other European countries.

3.4 Three quarters of the North American visitors taking part in the 2019 survey came from the USA, while Australia accounted for the majority of visitors from other parts of the world.

3.5 The proportion of European visitors holidaying in Wales was higher in the peak summer months than in the shoulder period (54% c.f. 43%). Conversely, higher proportions of North American visitors and visitors from other continents visited Wales during the shoulder months than in the peak months (see Table 3.1).

3.6 The profile of overseas visitors to Wales was older in 2019 than in 2016, with 41% aged 55+ in 2019, an increase from just over a third - 34% - in this age group in 2016. This was especially true of overseas visitors during the shoulder months, when almost half were aged 55 and over (49%).

3.7 There has been little change in the proportion of overseas visitors aged 16 to 34 years coming to Wales in 2019, but the proportion of visitors aged 35 to 54 years has declined (33% in 2019, down from 43% in 2016).

3.8 Women accounted for 54% of overseas visitors interviewed in 2019.

3.9   As with UK visitors, the majority of overseas visitors to Wales fell into the ABC1 social grades[10] - over eight in ten (83%) in 2019. The proportion of ABC1 visitors is declining gradually over the years however, from 87% in 2013.

3.10   ABC1 visitors from overseas were more likely to visit Wales during the shoulder months than the peak period (at 88% compared with 80% respectively).

3.11   Visitors from the C2DE social grades accounted for just one in six overseas visitors overall in 2019 (17%) but their proportion fell to 12% in the shoulder period. There were higher proportions of C2DE visitors to Wales coming to Wales from Europe (23%) than from North America and other continents (11%), no doubt linked to geographic proximity and lower travel costs.

3.12   As in earlier years, Black, Asian and Minority Ethnic visitors accounted for a small proportion of those visiting from overseas in 2019 (9%), although this is higher than for UK staying and day visitors.

3.13   The proportion of overseas visitors from ethnic minority communities was lower in 2019 than in 2016 and 2013 (15% and 13% respectively).

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[10] 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

Table 3.1: Profile of overseas visitors

%	Trends over time			Peak vs shoulder 2019	
	2019	2016	2013	Peak	Shoulder
Visitor origin					
Europe	50	48	51	54	43
North America	23	20	21	21	27
Rest of the world	27	32	29	25	30
Age					
16 – 34	26	23	24	25	26
35 – 54	33	43	36	37	25
55+ years	41	34	40	37	49
Gender					
Male	45	50	NA	47	42
Female	54	50	NA	53	58
Social grade					
ABC1	83	85	87	80	88
C2DE	17	14	12	20	12
Ethnicity					
White	91	85	87	92	90
Non-white/other	9	15	13	8	10

Base: all overseas visitors; 2019 - Stage I: 629, 2016 - Stage I: 801; 2013 - 395
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

3.14   The proportion of overseas visitors bringing pets on holiday to Wales was very low in 2019 - only 2% were travelling with a pet/s (unchanged from 2016).

3.15   At Stage 2, overseas 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). Around half (53%) of all overseas visitors gave Wales a score of 9 or 10, with another 43% scoring it 5 to 8 and 3% rating Wales 5 or lower on this aspect.

3.16   Turning to visitor groups, 7% of overseas visitor groups in 2019 included someone with a disability: 3% had a mobility impairment, 2% a long-term illness, 2% a hearing impairment and 1% a sight impairment or learning difficulties.

3.17   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. Only one in four (25%) of overseas visitors to Wales with someone with a disability within their party gave a very satisfied score (9

or 10). This was similar to the rating given by UK staying visitor groups including someone with a disability (24% very satisfied).

3.18   Over a third of overseas visitors to Wales in 2019 (36%) were visiting as a couple, consistent with previous years (34% in 2016). Around the same proportion of visitors from overseas (37%) were in family groups, of which the most common was families with young children (see Figure 3.1).

3.19   The proportion of overseas visitors holidaying in Wales with children is lower than UK visitors.

Figure 3.1: Type of parties visiting Wales 2019
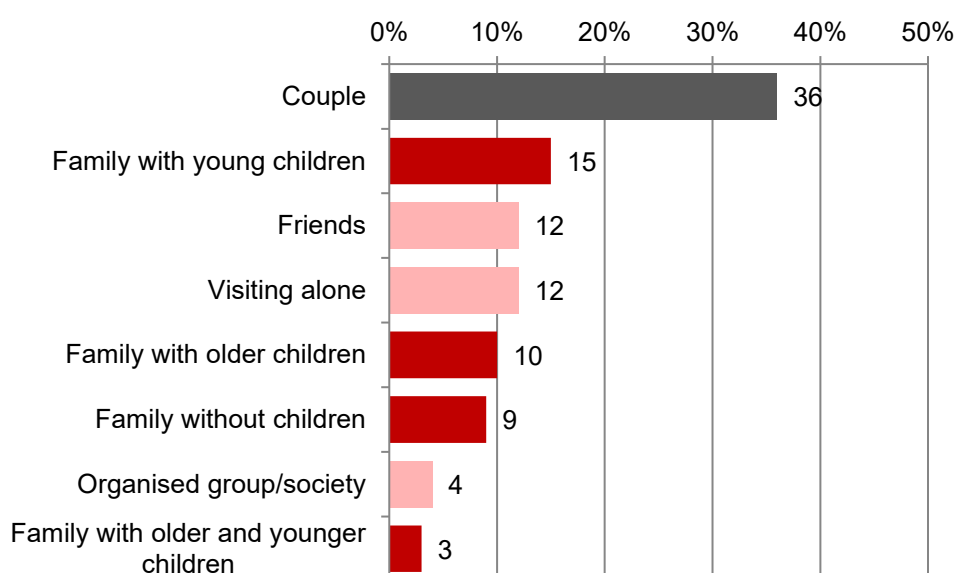
Base: 2019 Wales Visitor Survey – all overseas visitors Stage I (629)

3.20   Visitors from Europe were more likely than visitors from other parts of the world to visit Wales with young children (19% c.f. 11%). In contrast, visitors from other parts of the world were more likely to visit without children or with friends, compared to visitors from Europe (12% and 15% c.f. 7% and 10% respectively).

3.21   The average party size among overseas visitors in 2019 has declined to 3.6, down from 4.0 in 2016. This is the result of a decrease in the average number of adults per party (now 3.0, down from 3.2 in 2016) and a decrease in the number of children (0.5 down from 0.8 in 2016). Apart

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from organised groups/societies, families with children represented the largest visitor groups (averaging 4.2 people per party).

3.22   Overseas visitors were also classified into five groups, according to the Visit Wales international marketing segmentation. This is based on responses to a series of attitudinal statements about people's preferences in a holiday destination and the type of person they are[11].

3.23   Over four in ten overseas visitors to Wales in 2019 (44%) fell into the *Adventurers* segment; this rose to half of all overseas visitors during the shoulder months. A further one in four (26%) were *Explorers,* while 14% of overseas visitors were *Buzzseekers* and around the same proportion (12%) fell into the *Culture Buffs* category. Only 4% were *Sightseers* (see Figure 3.2).

Figure 3.2: Breakdown of overseas visitors 2019 by Visit Wales segmentation, total and peak / shoulder periods
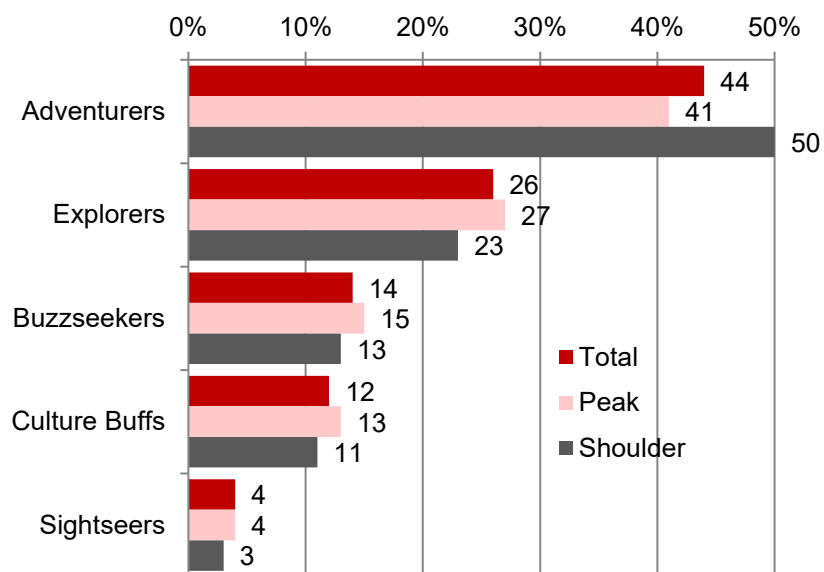
Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)

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[11] International segments are based on respondents' age and responses to six questions with paired statements (see Annex B Q45). The five segments are:
1 – Adventurers
2 – Buzzseekers
3 – Explorers
4 – Sightseers
5 – Culture Buffs

3.24   The majority of overseas visitors interviewed were on their first visit to Wales for a leisure break or holiday (69%), while around three in ten (32%) had visited before (see Figure 3.3).

3.25   Around one in five (21%) had made two or three visits to Wales in the previous three years, while about one in ten (11%) had made at least four visits in this time period. These levels of repeat visits are very similar to 2016 and higher than in 2013.

3.26   The average number of trips taken in Wales in the past three years by overseas visitors in 2019 was 2.1, again at a similar level to 2016 (2.0) but higher than in 2013 (1.5).

Figure 3.3: Frequency of visiting Wales in last 3 years, over time - %
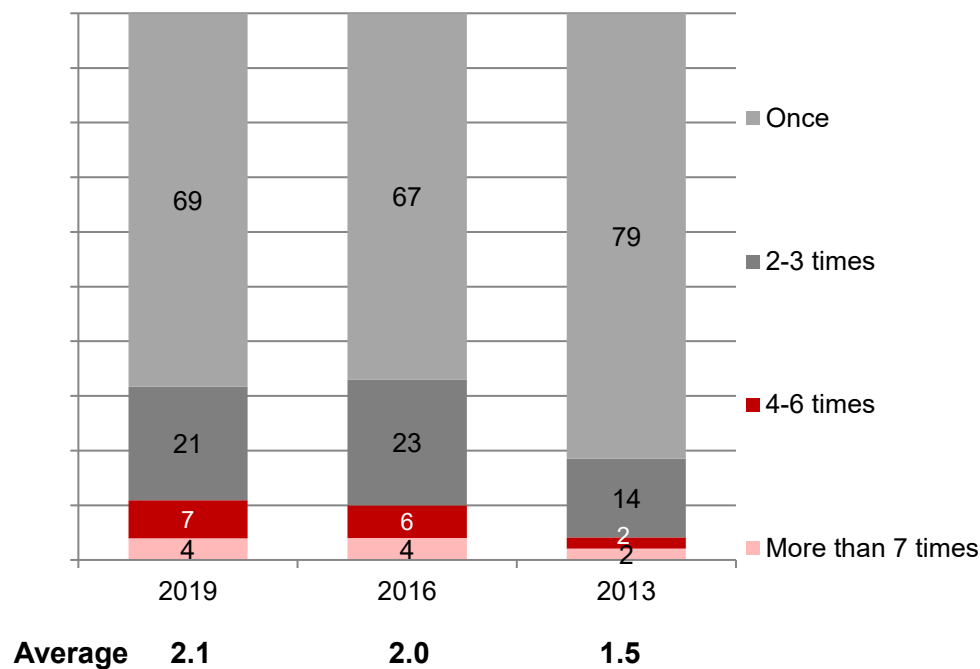
Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (238)

3.27   Overseas visitors from Europe were more likely to be repeat visitors than those visiting from other parts of the world. Visitors from Europe had visited Wales 2.4 times on average in the last three years, whereas visitors from outside Europe had visited Wales 1.7 times during the same period.

3.28   No real difference was evident in frequency of visiting between peak and shoulder season visitors.

Profile of trips taken by overseas visitors

3.29   Wales is primarily a holiday destination rather than a short-break
        destination for overseas visitors; as in 2016, three quarters of overseas
        visitors came to Wales for a holiday (58% main holiday, 19% secondary
        holiday) while only 14% came for a short break.

3.30   Overseas visitors from outside Europe were more likely to be on a main or
        secondary holiday (63%) compared to those from Europe (53%). Those
        visiting during the summer period were more likely to be on their main
        holiday of the year in Wales than those visiting during the shoulder months
        - 64% compared with 47% respectively (See figure 3.4)

Figure 3.4: Type of trip to Wales, by peak/shoulder periods, 2019 - %
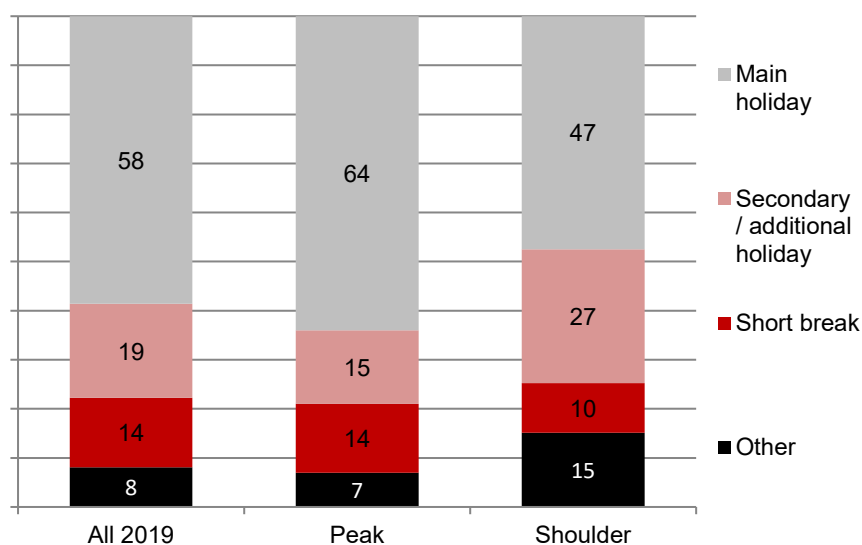
Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (238)

3.31   Of the Visit Wales marketing segments, *Explorers* were most likely to be
        taking their main holiday in Wales, while *Sightseers* were most likely to be
        taking a short break.

3.32   For almost half of overseas visitors (47%), Wales was their main or only
        holiday destination, especially those visiting from European countries
        (63%). In contrast, another UK country was the main holiday destination
        for just over one in four overseas visitors (27%) and another European
        country was the main destination for just under one in ten (8%). A sizable

minority of 14% were touring around the UK and Europe, visiting several different countries - this rose to 22% of those visiting Wales from outside Europe.

3.33   Those visiting from countries outside Europe were more likely to stay in one location than overseas visitors from European countries (56% compared to 42%).

3.34   First time visitors to Wales were more likely to tour around and stay in several places than repeat visitors (61% compared with 43% respectively).

3.35   As in previous waves of the visitor survey, most overseas visitors to Wales travelled to Britain by aeroplane (67% in 2019, up from 61% in 2016), with the most widely used airport being Heathrow (32%). 8% of overseas visitors had flown into Gatwick, 7% Bristol, 7% Manchester and 4% Cardiff Airport.

3.36   Almost one in four overseas visitors (24%) reached Britain by ferry (up from 21% in 2016 and 18% in 2013), mainly by car (16%) rather than on foot (6%); ferry ports in Wales were the arrival points for 7% of overseas visitors (almost all coming via Holyhead).

3.37   For their journey to Wales, six in ten (60%) overseas visitors reached Wales by hired car (35%) or private car (25%) - down slightly since 2016 (70%). Just over one in four (27%) used public transport (18% travelling to Wales by train and 9% by bus).

3.38   Looking at how they travelled around Wales during their trip, use of private cars dominated - 41% got around Wales in a hired car and 29% used a private car. Three in ten overseas visitors (30%) used public transport (16% train, 14% public bus or coach) while 8% walked. The proportion of overseas visitors using public transport in Wales has increased from its 2016 level of 22%.

3.39   When asked how satisfied they were with the quality and accessibility of public transport in Wales, half of the overseas visitors who had used the

public bus service or train while on holiday in Wales were very satisfied. The other half were moderately satisfied and none gave a negative rating.

Figure 3.5: Method of transport used to get around Wales during trip, 2019 - %
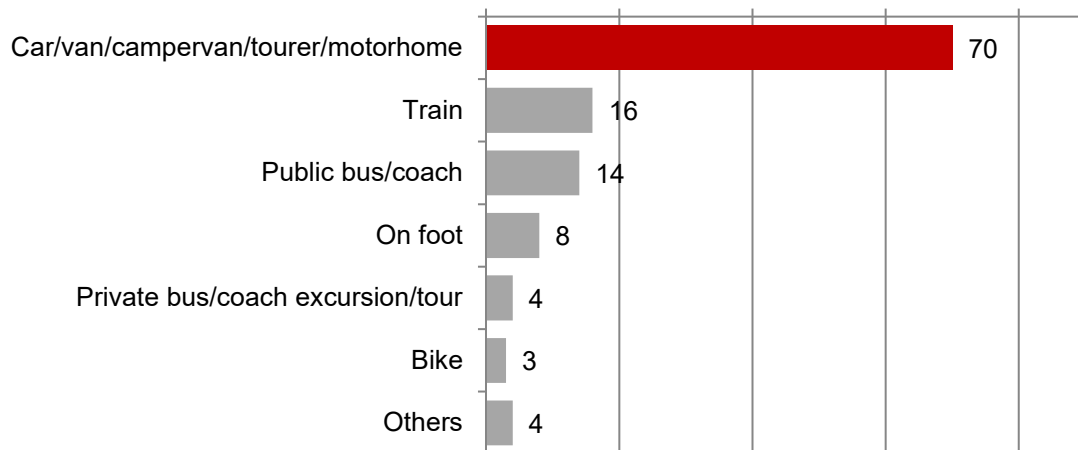
Method	%
Car/van/campervan/tourer/motorhome	70
Train	16
Public bus/coach	14
On foot	8
Private bus/coach excursion/tour	4
Bike	3
Others	4

Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260) Note: percentages may not add to 100% (more than one response is possible / data is rounded)

3.40   In the qualitative stage of the research, overseas visitors were more likely to have stayed in different places and to have travelled further while in Wales than UK visitors. They wished to see as much as they could in the time available. To illustrate this point, a US family spent two days in Wales and managed to visit Cardiff, Pembrokeshire, Aberaeron and Snowdonia. Similarly, a Dutch family on a three-day trip fitted in Cardiff and Blaenau Ffestiniog.

Wales was perfect to do something further away since we could see much of the country in a short time. We had hoped to see farmland and coastal beauty and we were not let down. Wales is the most beautiful and peaceful place we have ever been. (Overseas visitor from USA – qualitative phase)

Motivations for visiting Wales

3.41   Overseas visitors were asked which of a list of possible reasons for visiting Wales applied to them. They could choose as many or as few reasons as they wished.

3.42   The most popular motivations for coming to Wales were to **enjoy the country's natural landscape** (mentioned by just over seven in ten visitors – 71%), to **visit particular places, historical and religious sites or attractions** (mentioned by around two in three – 65%) and to **take part in outdoor or sporting activities** (mentioned by almost half – 45%). Almost four in ten (38%) came to **visit friends or relatives**, while around one in five (22%) came **for a city break** (see Figure 3.6).

3.43   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 54% in 2016 to 71% in 2019), to visit historical and religious sites (up from 48% to 65% in 2019) and to take part in outdoor or sporting activities (up from 21% to 45%).

Figure 3.6: Prompted reasons for visiting Wales 2019 - %
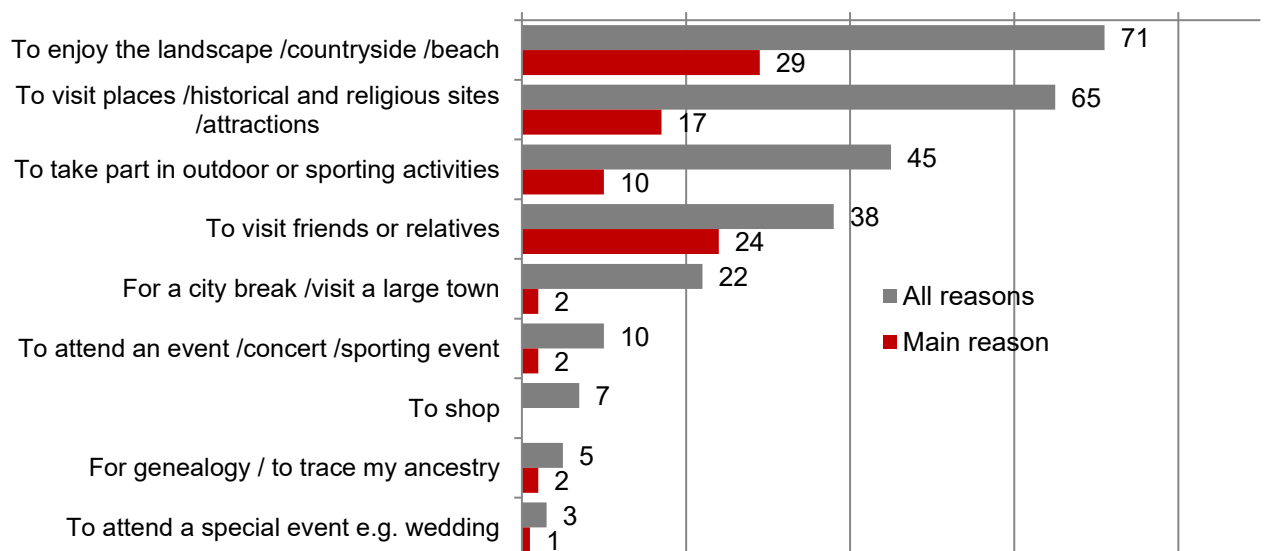
Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)
Note: percentages may not add to 100% (more than one response is possible / data is rounded)

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3.44   Overall, the single **main** reason for visiting Wales was to **enjoy the landscape/countryside/beach** – given by almost three in ten (29%) overseas visitors. This was more likely to be mentioned by visitors from Europe than those coming from other countries across the world (at 35% and 23% respectively). It was also more likely to be mentioned by peak period visitors than shoulder period visitors (at 32% compared with 24% respectively).

3.45   The main motivation to come to Wales for almost one in four overseas visitors was to **visit friends and family.** This was more likely to be given by visitors from outside Europe (27% compared to 22% of Europeans) and by slightly more of those visiting during the shoulder period than the peak period (at 26% compared with 24%) (see Figure 3.7).

Figure 3.7: Main prompted reason for visiting Wales 2019 by origin of visitor and season (peak / shoulder) - %
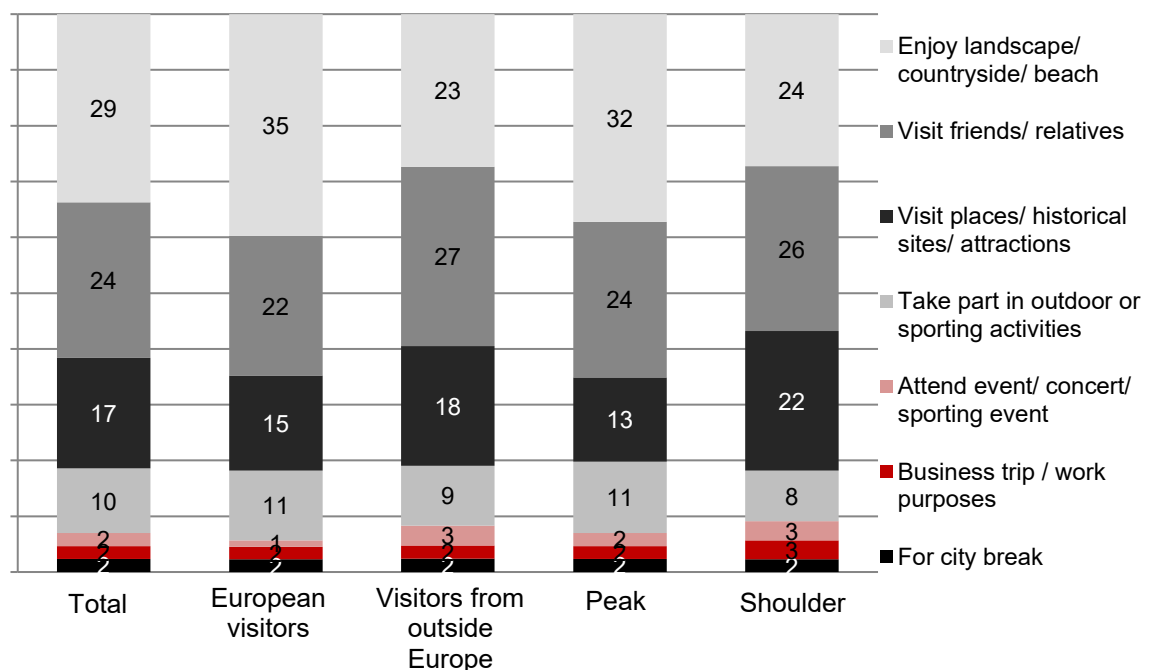
Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)

3.46   In the qualitative phase of research, the history of Wales was considered a major strength and was a motivation for some overseas visitors to visit Wales. Some believed that it contributed to the uniqueness of Wales, given the number of historical sites, especially castles, in a reasonably

small area. Historical sites had also provided memorable moments in their holiday for some visitors in the qualitative research.

I would stay in the very north of Wales, as I got hooked on the ancient castles. It is they and this scenic nature that are going to bring me back. (Overseas visitor from Germany – qualitative phase)

[We] stopped at St Fagans because we had read about it in our guidebook. Interesting stop and kids enjoy history… [Also], the ticketing people at Raglan were very helpful in planning our day and organising our Cadw membership... It turned out to be a great, unplanned day. It was fascinating to encounter at Raglan a medieval re-enactment. (Overseas visitor from USA – qualitative phase)

In going to Wales we were excited to hike through some beautiful natural areas amidst stories of times long ago. We also enjoyed learning a little of the culture and more recent history and current issues of Wales. (Overseas visitor from USA – qualitative phase)

3.47 Overseas 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.

3.48 Almost two thirds (63%) said they had come to relax and escape from the stresses of life, whilst approximately four in ten said they had holidayed in Wales before and wanted to return (42%), they always wanted to visit (42%) or that they wanted to visit a particular attraction / place (40%). A further 37% said they were attracted to come because Wales was easy to get to (see Figure 3.8).

Figure 3.8: Prompted factors that attracted visitors to come to Wales 2019 - %
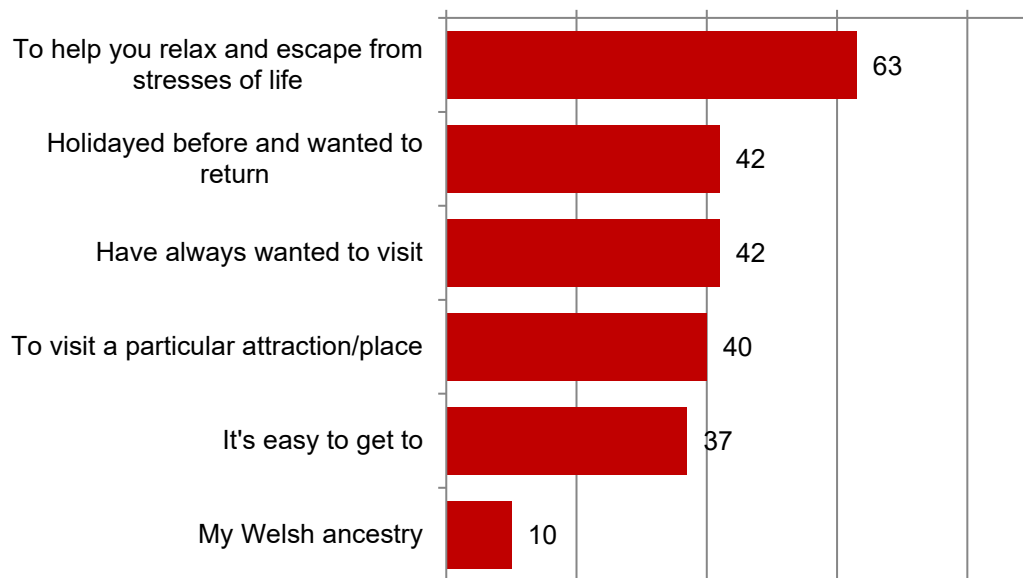
Factor	%
To help you relax and escape from stresses of life	63
Holidayed before and wanted to return	42
Have always wanted to visit	42
To visit a particular attraction/place	40
It's easy to get to	37
My Welsh ancestry	10

Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)
Note: percentages may not add to 100% (more than one response is possible / data is rounded)

3.49   Helping to relax and escape the stresses of life was the most frequently mentioned motivation for visiting Wales for overseas visitors from both Europe and other parts of the world, regardless of the season.

3.50   However, there was some variation in the proportion mentioning other motivating factors; for example, European visitors were considerably more likely to see Wales as a convenient destination that was easy to get to than visitors coming from further afield (50% compared to 25% respectively). Furthermore, non-European visitors were more likely to mention their Welsh ancestry was a motivator than those from European countries (17% compared to 3%) (see Figure 3.9).

Figure 3.9: Prompted factors that attracted visitors to Wales, by origin of visitor and season - %

Legend:
- Help you relax & escape from stresses of life
- Holidayed before & wanted to return
- Have always wanted to visit
- To visit a particular place/attraction
- It's easy to get to
- My Welsh ancestry

Values by group:

All 2019: 63, 42, 42, 40, 37, 10
European visitors: 64, 43, 45, 33, 50, 3
Visitors from outside Europe: 62, 42, 38, 46, 25, 17
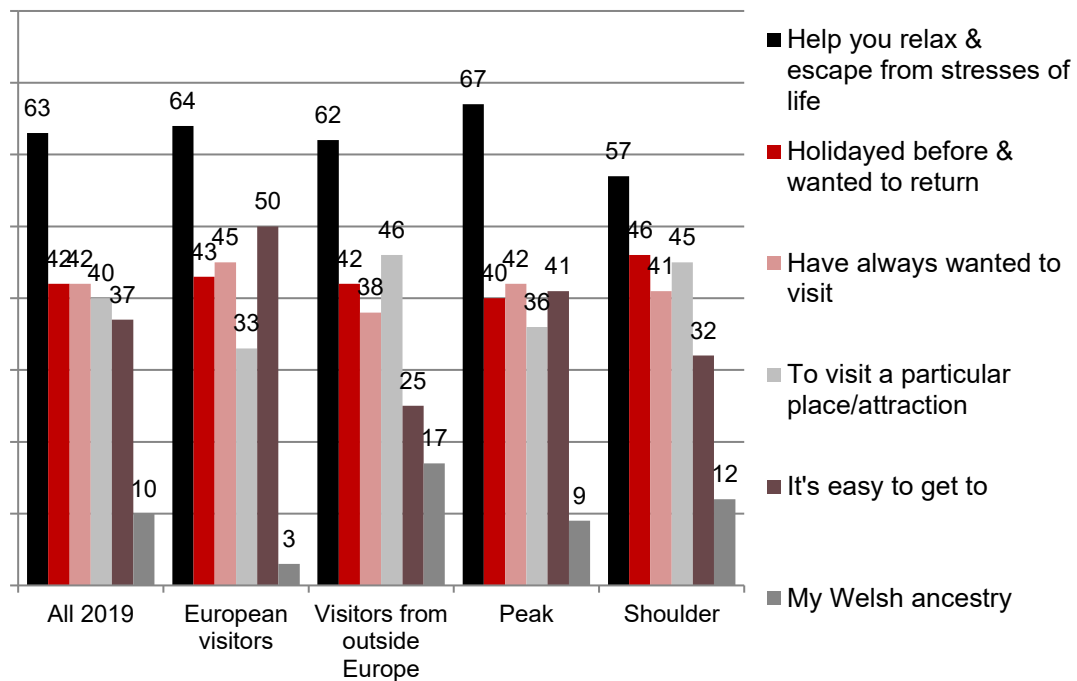Peak: 67, 40, 42, 36, 41, 9
Shoulder: 57, 46, 41, 45, 32, 12

Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)
Note: percentages may not add to 100% (more than one response is possible / data is rounded)

3.51   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.

The rural areas in Wales compelled [us] to put the phone away, shut off the laptop and fully engage in the beauty of the moment... Wales allows us to escape from the hustle and bustle of the town and transcend into a state of inner peace. (Overseas visitor from Germany – qualitative phase)

I find it is more about simple but powerful moments that I will cherish and always remember... Wales was filled with incredible moments for me and my daughter. The first day we were driving high up in the hills of the rolling farmland near Cardigan in our camper van and, while I am not very religious, I turned to my daughter and said I felt we were as close to heaven as we could possibly be. (Overseas visitor from USA – qualitative phase)

3.52   Overseas visitors were asked what had persuaded them to visit Wales on this occasion. They were read out a list and were asked which if any of these reasons applied.

3.53   Recommendation was a factor for around a third (34%), rising to 42% of younger visitors aged 16-34. Around one in six visitors (16%) said traveller review websites persuaded them to visit Wales, while a similar proportion mentioned the price of hotels/accommodation (14%). Around one in ten were persuaded to visit by the price of the air ticket and the favourable exchange rates (9% for each) (see Figure 3.10).

3.54   Younger overseas visitors were more likely to mention recommendation from friends and colleagues (42% compared to an average of 34%) and seeing something on social media (13% compared to 8% on average). Older overseas visitors were slightly more likely to have been persuaded by the accommodation price (17% compared to 14% overall) or good exchange rates (12% compared to 9% on average).

Figure 3.10: What persuaded visitors to spend their holiday/short break in Wales 2019 (prompted) - %
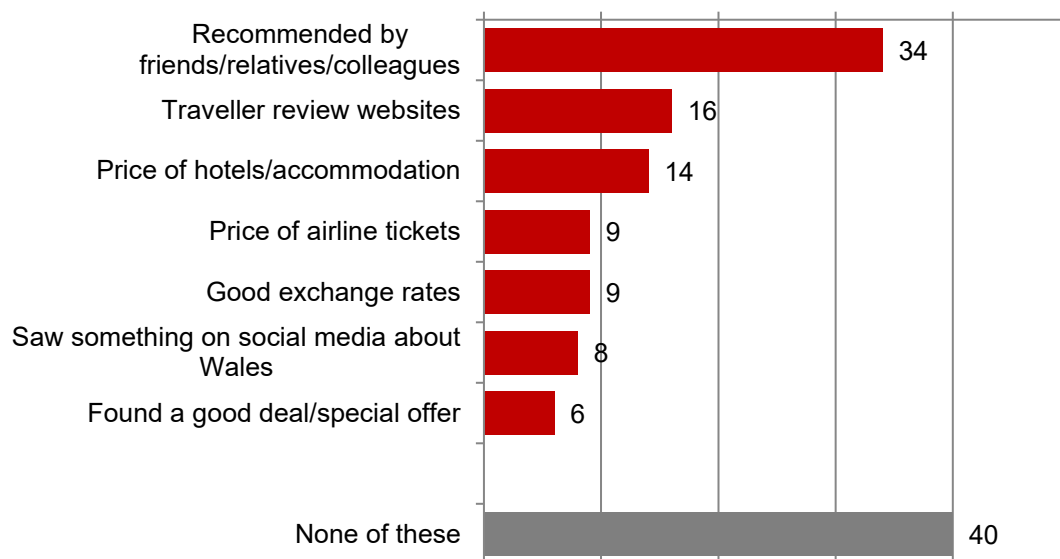
Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)
Note: percentages may not add to 100% (more than one response is possible / data is rounded)

Activities undertaken while in Wales

3.55   Visitors who said they came to Wales for particular reasons were asked about which related activities they had undertaken during their trip.

3.56   Seven in ten (71%) overseas visitors gave **enjoying the landscape/countryside/beach** as a reason for visiting Wales. Of these visitors, nearly three in four (72%) had visited a country park or forest during their stay in 2019 (up from 57% in 2016), while a similarly high proportion (69%) had visited a beach (up from 58%). Around a third of those who came to enjoy the natural environment had visited a garden or a wildlife attraction/nature reserve (34% and 33% respectively).

3.57   Peak-time overseas visitors were more likely to visit the beach than shoulder period visitors, but otherwise there was little difference by time of visit.

3.58   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 52% of overseas visitors who had visited a beach in Wales during their stay.

3.59   Nearly two thirds (65%) of overseas visitors said they had come to Wales to **visit places/historical or religious sites/specific attractions or to go sightseeing**. Of these, the majority (86%) had visited a castle or other historic attraction, up from 78% in 2016. A similarly high proportion said they had done some general sightseeing (84%, up from 68% in 2016), while 63% had visited a religious site such as a cathedral (up from 44% in 2016). Around half these overseas visitors had visited a museum during their trip in 2019, but this proportion has declined from 2016 (53%, down from 60%).

3.60   Almost half (45%) came to Wales to **take part in outdoor or sporting activities**. Of this group, the most popular activity undertaken was walking – 92% had walked over 2 miles and another 13% had walked less than 2 miles. A further 14% had taken part in swimming (down from 22% in 2016), while 11% had cycled during their stay. Most outdoor or sporting activities were undertaken by a higher proportion of overseas visitors during the peak months than the shoulder months.

3.61   One in ten (10%) said they had come to Wales to **attend an event/concert/performance or sporting event**. Half of this group had attended a live concert during their trip to Wales, while around one in four had been to an arts/cultural festival/Eisteddfod or a music festival. (see Table 3.2 overleaf).

Table 3.2: Main activities undertaken in Wales

| %	Trends over time			Peak vs shoulder 2019	
	2019	2016	2013	Peak	Shoulder
To enjoy the landscape/countryside/beach					
(base: all who came to enjoy landscape/countryside/beach – 180)					
Visited country parks/forest parks	72	57	40	70	76
Visited the beach	69	58	55	74	59
Visited gardens	34	35	21	35	33
Visited a wildlife attraction/nature reserve	33	26	NA	34	32
Wildlife watching	18	14	7	21	12
To visit places/historical and religious sites/attractions					
(base: all who came to visit places/historical and religious sites /attraction – 179)					
Castle or other historic attraction	86	78	78	86	86
General sightseeing	84	68	46	86	80
Religious site (e.g. cathedral)	63	44	16	61	66
Museum or heritage centre	53	60	45	53	55
Nature-based attraction (e.g. gardens)	37	44	17	36	40
Industrial heritage attraction	32	24	22	28	40
Scenic/steam/historic railway	25	24	12	23	28
Animal-based attraction (e.g. zoo)	18	11	5	23	10
Art gallery or exhibition	13	16	15	12	16
To take part in outdoor or sporting activities					
(base: all who came to take part in outdoor or sporting activities – 113)					
Walking (more than 2 miles)	92	83	73	92	91
Swimming (indoor & outdoor)	14	22	NA	17	8
Walking (less than 2 miles)	13	16	39	16	7
Cycling	11	10	11	11	11
Water sports	8	2	3	10	5
Adventure sports	7	7	NA	9	5
Mountain biking	2	3	2	9	3
To attend an event/concert/performance/sporting event					
(base: all who came to attend an event/concert/performance/sporting event – 25*)					
Live concert	49	30	15	55	39
Arts/cultural festival/Eisteddfod	27	7	11	28	26
Music festival	26	7	NA	21	37
Food and drink festival	22	NA	NA	13	39
Theatre or cinema performance	19	15	7	16	26
Sporting event	14	22	19	16	11

Base: all overseas visitors; 2019 –Stage II: 260; 2016 – Stage II: 296; 2013 – 368
Table notes: N/A = not captured in 2013; * Note the small base size figures in red indicate a change over time or a marked difference between peak and shoulder season visitors

3.62 When looking at the total sample of overseas visitors, the most popular activities overall were visiting a castle or historic attraction, and general sightseeing (60% and 59% respectively). See Figure 3.11.

3.63   Some regional differences were evident in the types of places visited and activities undertaken, reflecting the mix of attractions available across Wales.

3.64   Overseas visitors visiting Mid and West Wales were more likely to visit country parks/forests and beaches than those visiting other areas of Wales.

3.65   Those visiting South Wales were more likely to have visited museums or gardens compared to visitors in other regions across Wales.

Figure 3.11: Activities undertaken/places visited in Wales, by region (based on the total sample of overseas visitors) - %
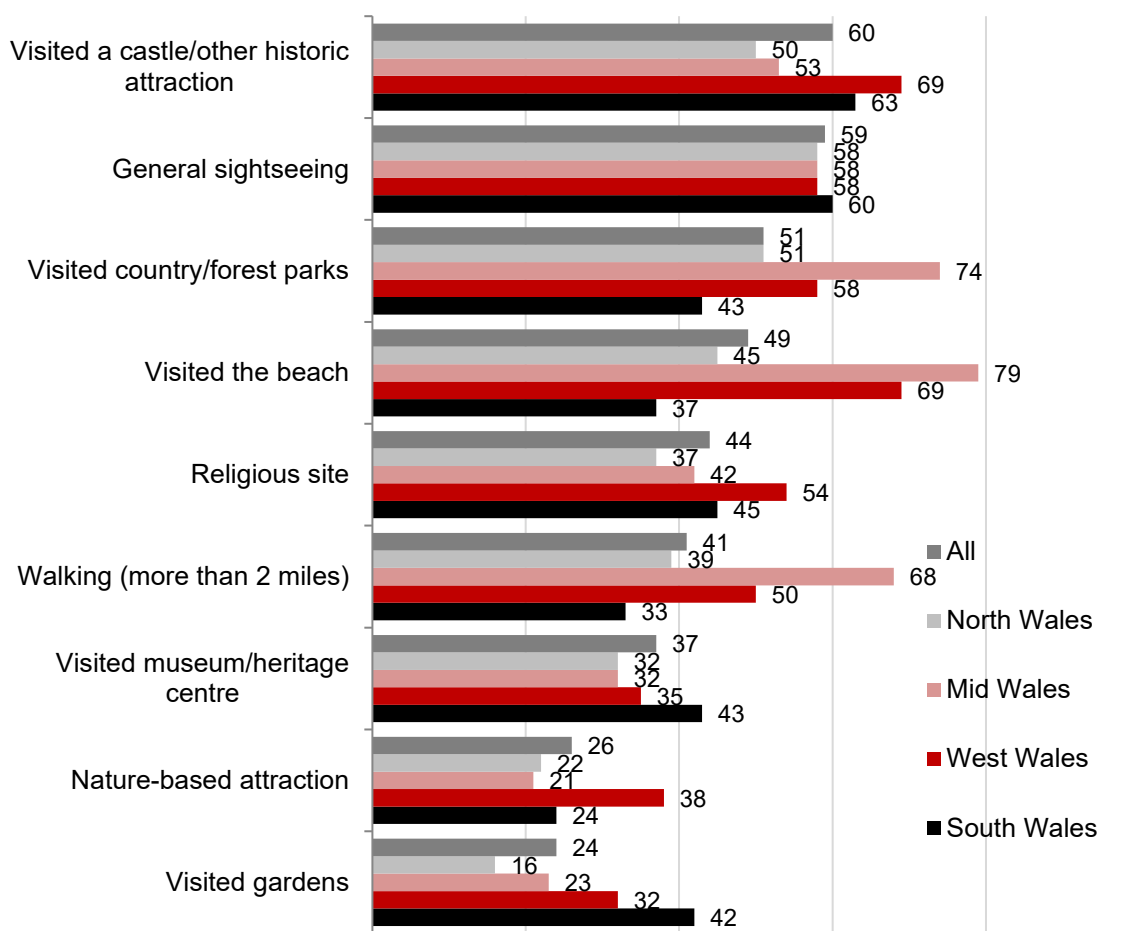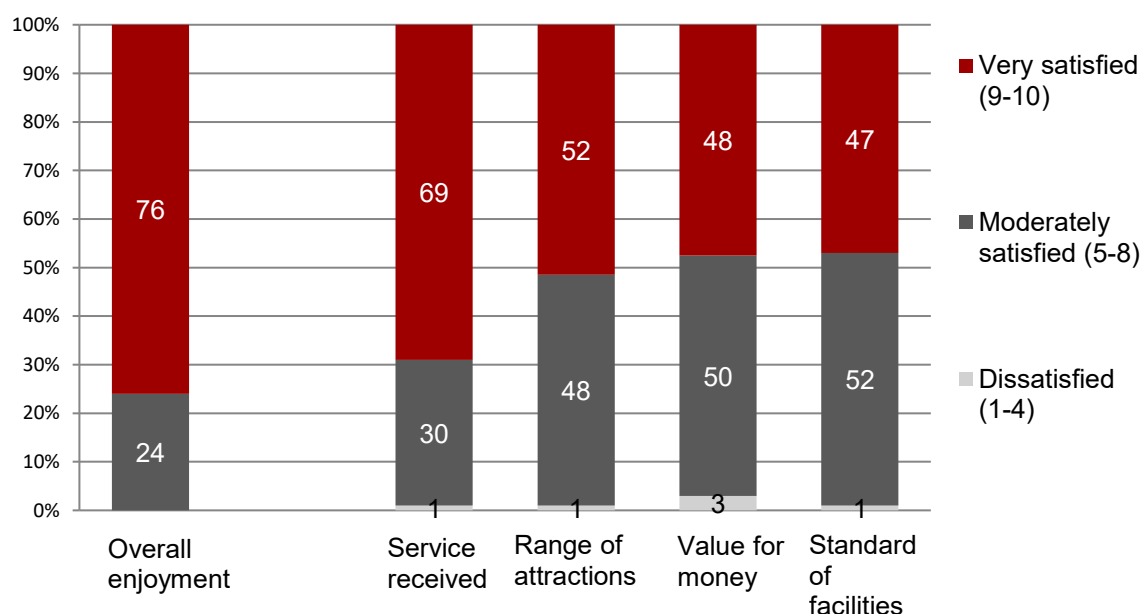

Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)
Note: percentages may not add to 100% (more than one response is possible / data is rounded)

Perceptions of attractions visited

3.66   Overseas 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 high, with around three in four (76%) giving a score of 9 or 10 for their **overall enjoyment of the attractions** visited (see Figure 3.12). The **service** received at the attractions visited was also rated particularly highly, with almost seven in ten (69%) giving it a score of 9 or 10.

3.67   Slightly lower scores were given for the **range of attractions** (52% very satisfied), for their **value for money** (48% very satisfied) and the **standard of facilities** (47% very satisfied), with higher proportions giving moderately satisfied scores of between 5 to 8 on each of these dimensions.

3.68   Very few visitors gave scores lower than 5 on any dimension, with the exception of value for money - 3% of overseas visitors who had visited an attraction in Wales during their trip were dissatisfied with its value for money. Overseas visitors were less satisfied than UK visitors on this dimension.

Figure 3.12: Satisfaction with attractions visited in Wales 2019

Base: 2019 Wales Visitor Survey – overseas visitors Stage II who visited attractions during their stay (175)

3.69   Average satisfaction ratings were comparable with the 2016 data. No
        major differences were evident in satisfaction between peak and shoulder
   period visitors.

Eating out and accommodation

3.70   Over nine in ten (92%) overseas visitors ate out during their trip (up from
        84% in 2016). Overseas visitors in North Wales were slightly less likely to
        eat out (at 86%).

3.71   Visitors' rating of Wales for its eating out experience was lower than for its
        attractions. The proportion of those eating out during their visit who were
        very satisfied on different dimensions ranged from just under half (for the
        service provided) down to just over one in five (for the **use of Welsh and
        local produce on menus**) (see Figure 3.13).

3.72   While dissatisfaction with any dimension was very low, it was highest for
        the use of local Welsh produce (at 3%). Three in ten (30%) were unable to
        comment, however.

Figure 3.13: Satisfaction with eating out in Wales 2019
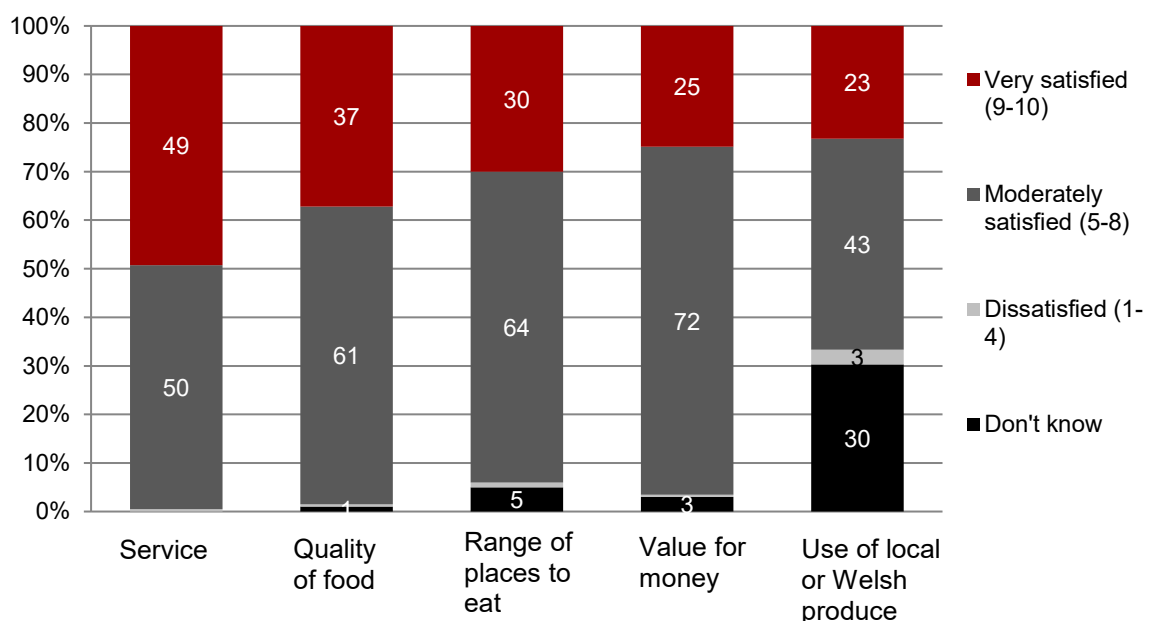
Base: 2019 Wales Visitor Survey – overseas visitors Stage II who ate out during their stay (240)

3.73   Satisfaction with some aspects of eating out in Wales has fallen since 2016. For example, the proportion of overseas visitors very satisfied with value for money and the use of local or Welsh produce has dropped (from 28% to 25% and from 31% to 23%). However, the proportion very satisfied with the service has risen (49%, up from 43%). Satisfaction with the quality and range of places to eat in Wales has remained largely unchanged.

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

% 'very satisfied'	Trends over time	
	2019	**2016**
Service	49	43
Quality of food	37	37
Range of places to eat	30	31
Value for money	25	28
Use of local or Welsh produce	23	31

Base: Wales Visitor Survey – overseas visitors Stage II (2019 - 240; 2016 – 269)
Table notes: Very satisfied: scoring 9 or 10/10; 1 = very dissatisfied; 10 = very satisfied

3.74   As in previous years, hotels and self-catering accommodation were the most popular types of accommodation used by overseas visitors when holidaying in Wales. Overall, the profile of accommodation used in 2019 was broadly comparable with 2016. However, the use of hotels increased slightly in 2019 (from 26% in 2016 to 29%), as did the proportion of visitors staying at an Airbnb/someone else's home on a commercial basis (8%, up from 4%). There was little change in the use of guest houses/B&Bs and self-catering accommodation over time (17% and 13% in 2019, compared to 19% and 12% in 2016).

3.75   Around one in six (16%) overseas visitors were staying at a friend or relative's home while visiting Wales, down from 21% in 2016. A small proportion of overseas visitors used other types of accommodation, such as a camping site, a caravan or motorhome, a hostel or farmhouse.

3.76   Marked differences were evident in the accommodation choices of visitors from different parts of the world:

- Visitors from outside Europe were more likely to stay in hotels than European visitors (32% compared to 26%)

- European visitors were more likely to use guesthouses/B&Bs and self-catering accommodation than those from outside Europe (20% and 17% compared to 13% and 9%)

- Visitors from countries outside Europe were more likely to stay at a friend or relative's home or to stay in someone else's home on a commercial basis (19% and 11% respectively, compared to 13% and 6%).

3.77   The most common way of booking their accommodation or package for overseas visitors staying in commercial accommodation was through a third-party online accommodation site such as Booking.com, Expedia or LateRooms.com (used by 41%). One in five (20%) had booked directly with the accommodation provider and 14% had used Airbnb.

3.78   The proportion booking directly with the accommodation provider is largely unchanged from 2016 but represents a sharp fall from the 2013 level, although it must be noted the base for 2013 is slightly different[12]. Third party online accommodation site use has increased from 2016 and Airbnb features in the list for the first time in 2019 (see Figure 3.14).

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[12] 2013 base is all overseas visitors excluding those answering 'Not applicable'; 2016 and 2019 base is all overseas visitors staying in commercial accommodation

Figure 3.14: Main method of booking accommodation in Wales, over time - %
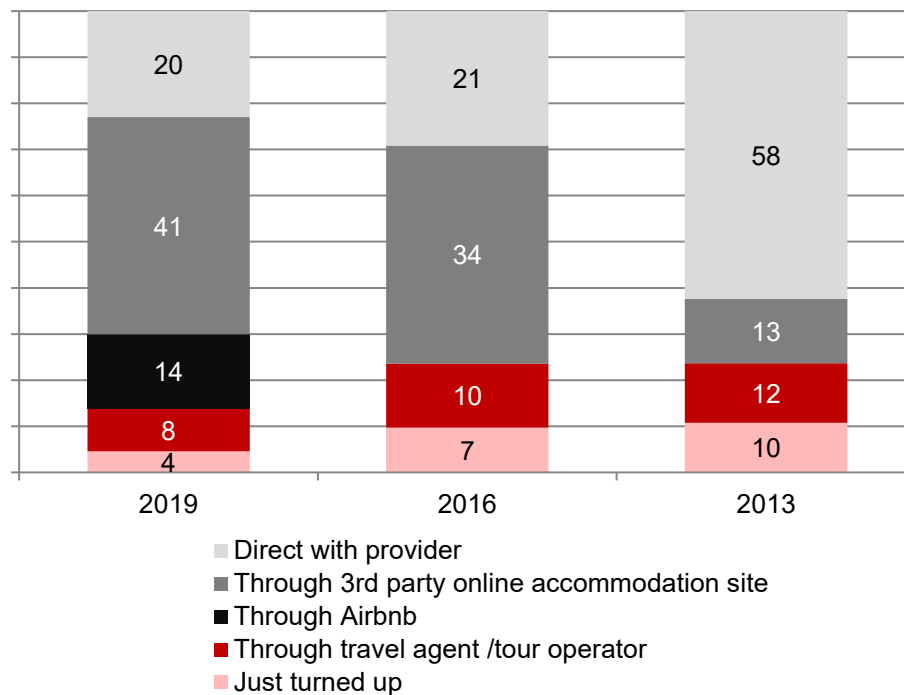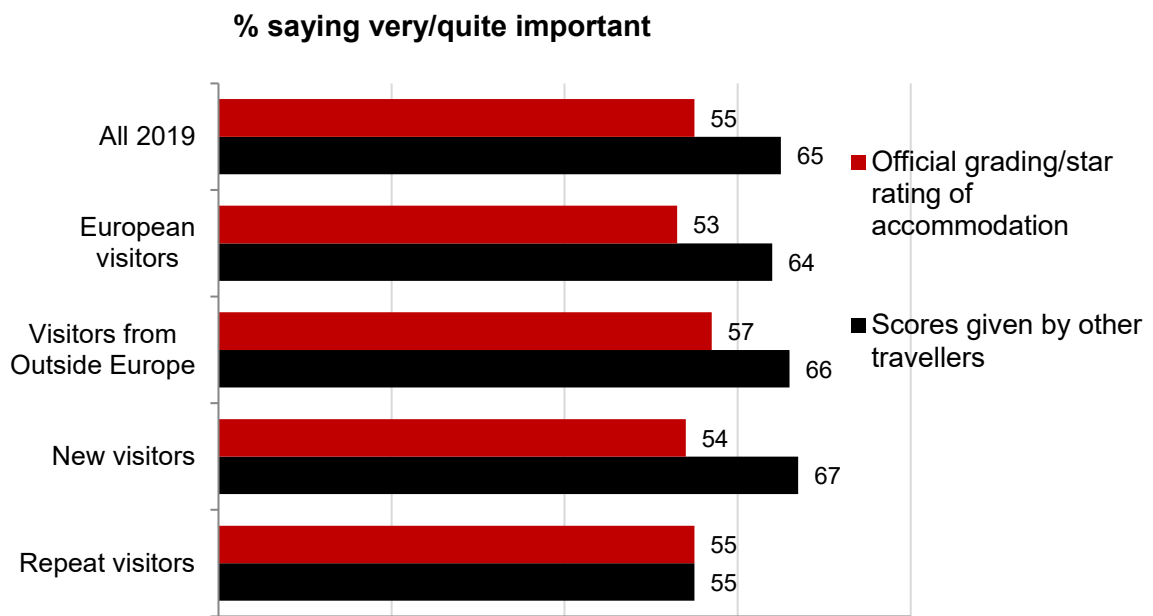

Base: Wales Visitor Survey – all overseas visitors Stage II staying in commercial accommodation
Note: 2013 base is all visitors excluding 'Not applicable' (2019 - 193; 2016 - 237; 2013 - 264)

3.79   Only 7% of overseas visitors in 2019 had booked both their accommodation and travel together via the same provider or as part of a package.

3.80   This has fallen quite considerably from 2016, when almost one in five (18%) had done so. Over 65s were more likely to have booked their accommodation and travel to Wales as a package (16%, compared to 7% overall).

3.81   The remaining 93% of visitors booking in advance had arranged their accommodation and travel separately.

3.82   Scores given by other travellers on websites such as TripAdvisor or Booking.com were important to two thirds (65%) of overseas visitors staying in commercial accommodation when booking their accommodation in Wales. User ratings online were more important generally than the official grading or star rating of the accommodation (at 65% compared with 55%) (see Figure 3.15).

3.83   Neither scores given by other travellers nor the official grading of the
        accommodation were important to a sizable minority of overseas visitors
        who had stayed in commercial accommodation in Wales, however (at 16%
        and 23% respectively).

3.84   Traveller reviews and scores were particularly important to new visitors to
        Wales (67% compared to 55% of repeat visitors) while the official
        grading/star rating of the accommodation was slightly more important to
        visitors from outside of Europe (57% compared to 53%).

**Figure 3.15: Importance of official grading/star ratings and ratings given by
other travellers when booking accommodation, by origin of visitor and
new/repeat**

% saying very/quite important

Base: 2019 Wales Visitor Survey – overseas visitors Stage II who stayed in commercial
accommodation in Wales (193)

3.85   When asked about their satisfaction with the accommodation used in
        Wales, six in ten (61%) overseas visitors who had stayed in paid
        accommodation were very satisfied overall. A third were moderately
        satisfied and just 2% were dissatisfied (see Figure 3.16).

3.86   Those staying in self-catering accommodation or a guesthouse/B&B were
        more likely to be very satisfied with their accommodation than those
        staying in a hotel in Wales (at 68% and 67% respectively, compared with
        59% for hotels).

3.87   Satisfaction with the service, quality and value for money of the
        accommodation used was also relatively high, with the proportion very
        satisfied on each dimension ranging from 47% to 40%.

Figure 3.16: Satisfaction with accommodation in Wales 2019 - %
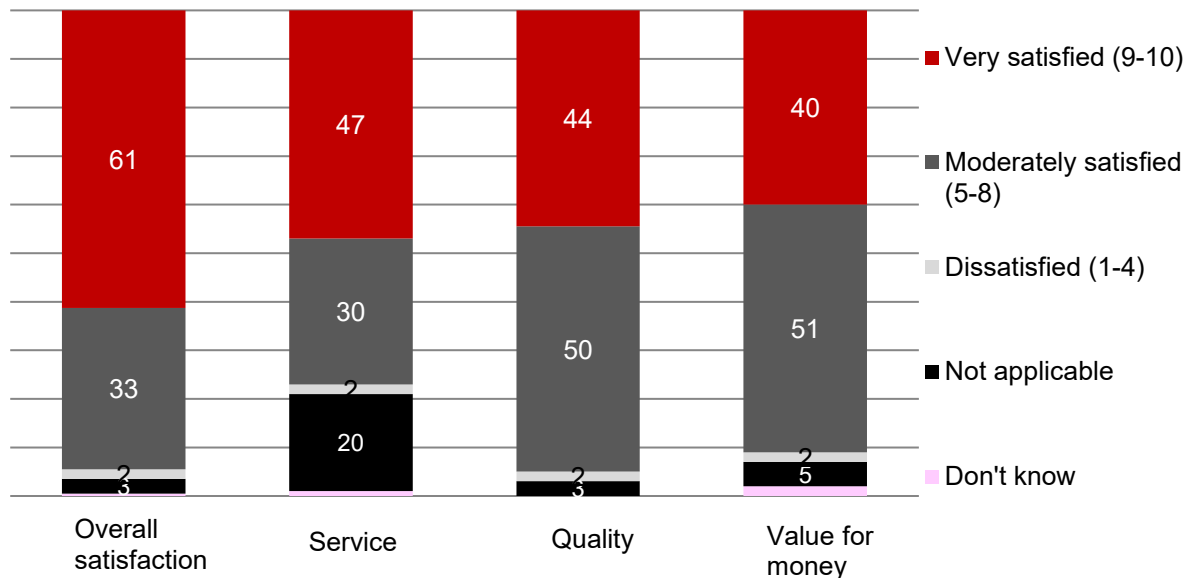
Base: 2019 Wales Visitor Survey – overseas visitors Stage II who stayed in commercial accommodation in Wales (193)

3.88   Average satisfaction scores for each dimension have remained consistent
        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	8.6	8.6
Service	8.6	8.6
Quality	8.3	8.4
Value for money	8.1	8.1

Base: Wales Visitor Survey – overseas visitors Stage II who stayed in commercial accommodation in Wales (2019 - 193; 2016 – 231)
Table notes: Mean score scale: 1 = very dissatisfied; 10 = very satisfied; mean scores exclude 'Don't know'

Sustainability and sense of place

3.89   Almost nine in ten overseas visitors (85%) considered Wales to be a sustainable tourism destination for holidays and breaks, with most visitors overall (61%) strongly agreeing that it was. This represents a marked increase from the levels seen in previous years (with 39% strongly agreeing in 2016). Repeat visitors were most likely to agree strongly.

3.90   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 overseas visitors (80%) were able to single out something that was distinctively Welsh about their trip. Only 20% could not. As in 2016, **heritage sites** were most often mentioned as being distinctively Welsh (by 65% of visitors), followed by **visitor attractions** and **food and drink** (selected by 46% and 44% of overseas visitors respectively) and **outdoor activities** (27%).

3.91   The majority of overseas visitors were looking for an experience in Wales that they could not have anywhere else – 84% regarded it as important that their trip was distinctively Welsh, while only 14% did not.

3.92   Sense of place was more important to visitors from outside Europe than to those from Europe (at 90% compared to 78%) (see Figure 3.17).

3.93   Almost six in ten (59%) overseas visitors thought it was important to be able to see or hear the Welsh language during their visit to Wales, with 26% regarding it to be very important. Almost four in ten (38%) did not think the Welsh language was important, however. The views of overseas visitors on the importance of seeing or hearing the Welsh language during their trip are largely unchanged from 2016.

3.94   Again, visitors from outside Europe were more likely to want to see or hear the Welsh language during their visit (67% compared to 52% of Europeans).

Figure 3.17: Importance of distinctive elements of visit 2019, by origin of visitor

% saying important
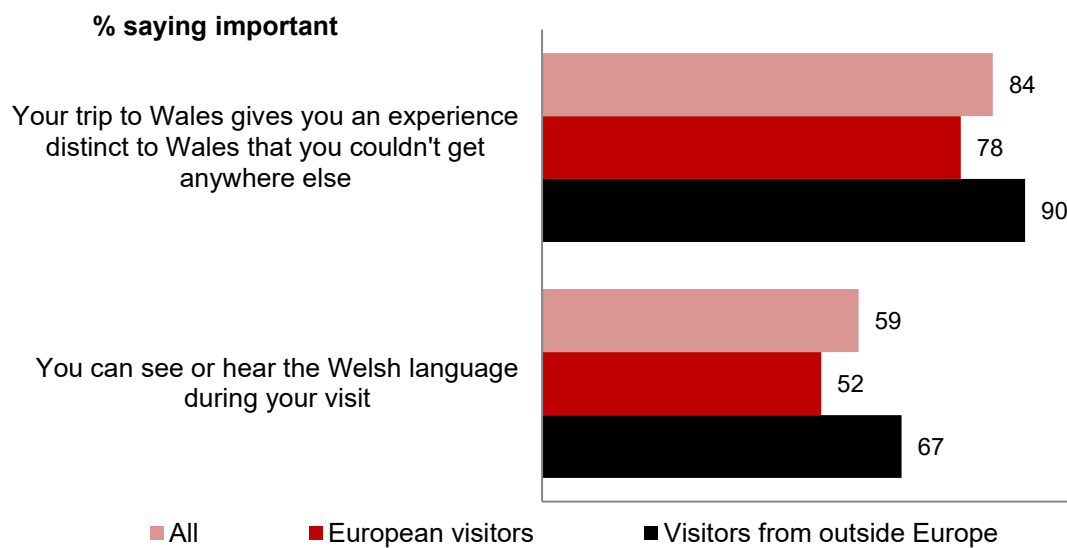
Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)

Marketing recall and holiday planning

3.95   Just over four in ten (43%) of overseas visitors in 2019 had seen some advertising, marketing or communications about Wales before their trip, down from 51% in 2016 (see Figure 3.18).

3.96   The most commonly recalled channel was general websites (mentioned by 12% of overseas visitors overall) and word of mouth (mentioned by 11%). This was also the case in 2016 but both were mentioned by a higher proportion of overseas visitors in that year (16% for each).

3.97   One in ten overseas visitors overall mentioned seeing the Visit Wales official tourist board website - rising to 13% of visitors from European countries. Only small proportions mentioned seeing or hearing any other type of advertising, marketing or publicity for Wales.

3.98   Almost six in ten overseas visitors had not seen any advertising, marketing and publicity before visiting Wales (57% - rising to 63% of those from countries outside of Europe).

Figure 3.18: Prompted recall of advertising, marketing and publicity for Wales pre-visit, by origin of visitor - %
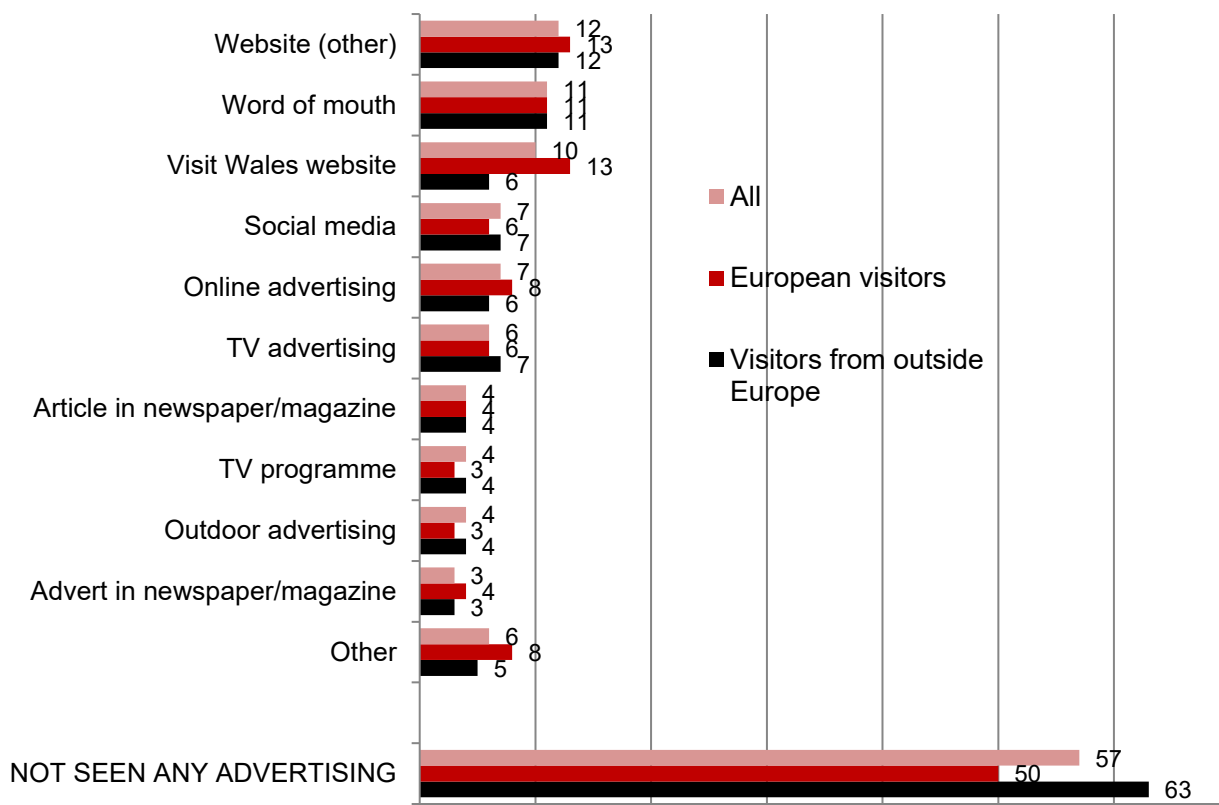
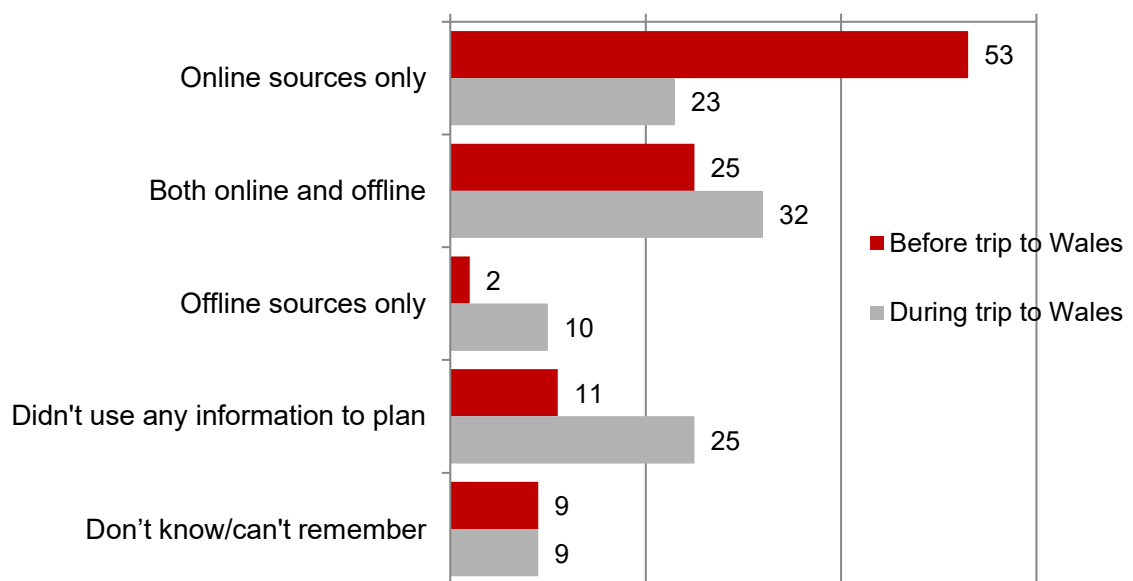*Base: 2019 Wales Visitor Survey – all overseas visitors Stage I (629)*
Note: percentages may not add to 100% (more than one response is possible / data is rounded)

3.99   2% of overseas visitors had heard of 'The Wales Way' campaign. Among the small number who were aware of it, the majority said it had made no difference to their decision to visit Wales, but it did influence just under 1% of overseas visitors overall.

3.100   8% of overseas visitors had seen advertising, marketing or publicity for 'Year of Discovery 2019', rising to 13% of visitors from Europe. While it had made little or no difference to their decision to visit Wales for eight in ten (80%) of those aware, it had influenced one in five of those who had seen it to some extent (or 2% of overseas visitors overall).

3.101   Almost nine in ten (89%) overseas visitors used some information sources to help plan their trip to Wales: just over half (53%) only used online sources such as websites and apps when information gathering (which has increased since 2016 – 45%), while another 25% used both online

sources and offline sources such as brochures and leaflets (down from 31% in 2016). Only 2% of overseas visitors solely used sources of information not found on the internet before visiting Wales (down from 8% in 2016) (see Figure 3.19).

3.102   Although information gathering was lower during their stay, two thirds of overseas visitors (65%) did look for information while in Wales - 25% did not. Among those who did, almost a quarter (23%) only used online sources of information (broadly unchanged from 2016), while 32% used both online and offline information (up from 21% in 2016). 10% only used offline sources (down from 19% in 2016).

Figure 3.19: Holiday planning: information sources used before and during trip to Wales 2019 - %

Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)

3.103   Websites were used for planning their trip to Wales by the majority of online information users in 2019 (96%). Another 16% said they used apps, while 13% used email and 11% used social media. Apps were most likely to be mentioned by younger visitors aged 16 to 34.

3.104   Search engines such as Google were most commonly-mentioned by online information users (mentioned by around four in ten of this group – 41%). Around one in five (22%) mentioned online accommodation booking sites (such as LateRooms.com, Expedia, Booking.com and Airbnb), 17%

the Visit Wales website, and 15% each tourist attraction websites and travel review sites such as TripAdvisor.

3.105   Google and other search engines also dominated when visitors were asked which types of website or app they had used for information gathering during their trip to Wales (mentioned by 54% of those who had used online information sources). Navigation websites such as Google maps and travel review sites were also mentioned by 17% and 14% respectively. The Visit Wales website was used by 7% of overseas visitors during their trip to Wales.
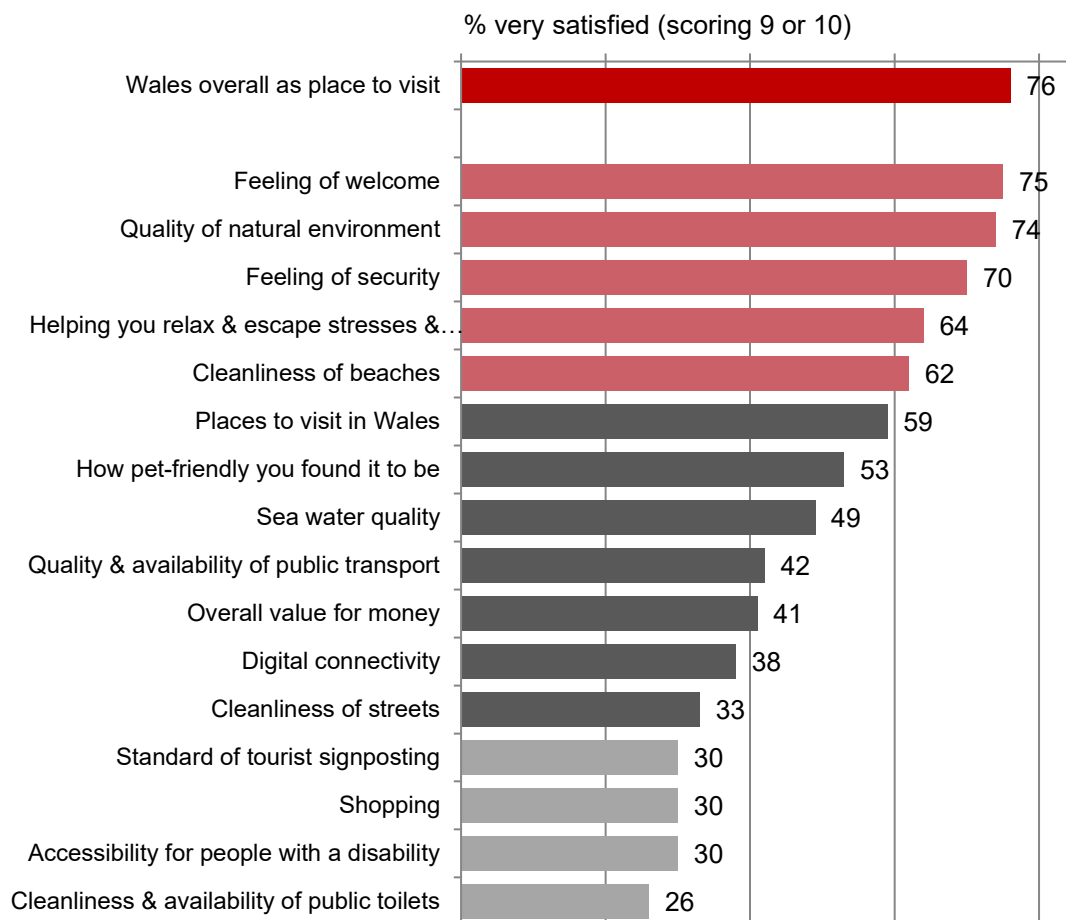
Satisfaction with overall visit experience

3.106   Around three quarters (76%) of overseas visitors in 2019 were very satisfied with **Wales overall as a place to visit**. The average satisfaction score of 9.2 is up slightly from 2016 (9.0) but is still slightly below the 2013 level (9.4). No major differences were evident in the satisfaction levels of peak vs shoulder period visitors, by demographics or by international marketing segment.

3.107   Satisfaction was highest with the **feeling of welcome** and the **quality of the natural environment in Wales**, with around three quarters of overseas visitors saying they were very satisfied with each (at 75% and 74% respectively). Satisfaction with the feeling of welcome has increased from 68% in 2016. High proportions of overseas visitors were very satisfied with the **feeling of security** (70%), **helping you relax from the stresses and strains of life** (64%), and the **cleanliness of beaches** (62%). All were rated a 9 or 10 by at least six in ten overseas visitors who expressed a view in 2019.

3.108   While satisfaction was generally high, satisfaction was lowest with the **cleanliness and availability of public toilets**, **accessibility for people with a disability**, **shopping** and the **standard of tourist signposting**. Fewer than a third of overseas visitors expressing an opinion were very satisfied with Wales on any of these dimensions.

3.109   The highest dissatisfaction was evident for **cleanliness and availability of public toilets**. This dimension was scored between 1 and 4 out of 10 by 7% of overseas visitors who expressed an opinion.

3.110   Figure 3.20 illustrates overseas 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 3.20: Satisfaction with visit to Wales 2019

% very satisfied (scoring 9 or 10)

Dimension	%
Wales overall as place to visit	76
Feeling of welcome	75
Quality of natural environment	74
Feeling of security	70
Helping you relax & escape stresses &…	64
Cleanliness of beaches	62
Places to visit in Wales	59
How pet-friendly you found it to be	53
Sea water quality	49
Quality & availability of public transport	42
Overall value for money	41
Digital connectivity	38
Cleanliness of streets	33
Standard of tourist signposting	30
Shopping	30
Accessibility for people with a disability	30
Cleanliness & availability of public toilets	26

Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260); 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)

3.111   Only 13 overseas visitors taking part in the survey rated Wales 7 out of 10 or lower as a place to visit (5%) and were asked what would have improved their experience or encouraged them to give Wales a higher score, apart from the weather.

3.112   Some comments from less satisfied overseas visitors include:

I think there is a missed opportunity, as for instance a dragon's trail or druids' trail that connects Welsh history, for people with a particular interest.

I am comparing with other parts of the UK.

I liked it very much...there were many castles but the beach I visited wasn't so nice...

I guess more of a variety of attractions.

I wasn't happy with how narrow the roads are in Wales - this had quite a negative impact on the holiday. We were travelling in a car towing a touring caravan and we felt the roads were also obstructed by high hedges as well. We loved Wales but we would have to consider the roads if we were going to return again.

3.113   Reflecting the generally high overall satisfaction levels among overseas visitors, the trip to Wales exceeded expectations for almost six in ten visitors (58%). This is lower than in 2016, however (67%). For almost four in ten visitors in 2019 (39%), the trip met their expectations. Only 1% of those interviewed said their trip to Wales was not as good as expected.

3.114   New visitors and these from outside Europe were most likely to say their trip was better than expected (at 70% and 64% respectively, compared with 58% overall).

Likelihood of coming back and of recommending Wales

3.115   Three quarters (75%) of overseas visitors said they were likely to make another visit to Wales in the next few years, with 45% overall saying they would definitely come back. Only 2% said they would definitely not re-visit Wales, while 12% said they probably would not visit again. The proportion of visitors saying they would definitely make another visit is broadly unchanged from 2016 (44%).

3.116   Three in four repeat visitors (75%) said they would definitely return to Wales in future compared with just over one in three (34%) of new

visitors). European visitors were also more likely to say they would come back (see Figure 3.21).

3.117   Likewise, more affluent ABC1 overseas visitors were more likely to say they would definitely make another trip to Wales than less affluent C2DE visitors (at 48% compared with 31%).

**Figure 3.21: Likelihood of coming back to Wales 2019 by origin of visitor and new / repeat visitor - %**
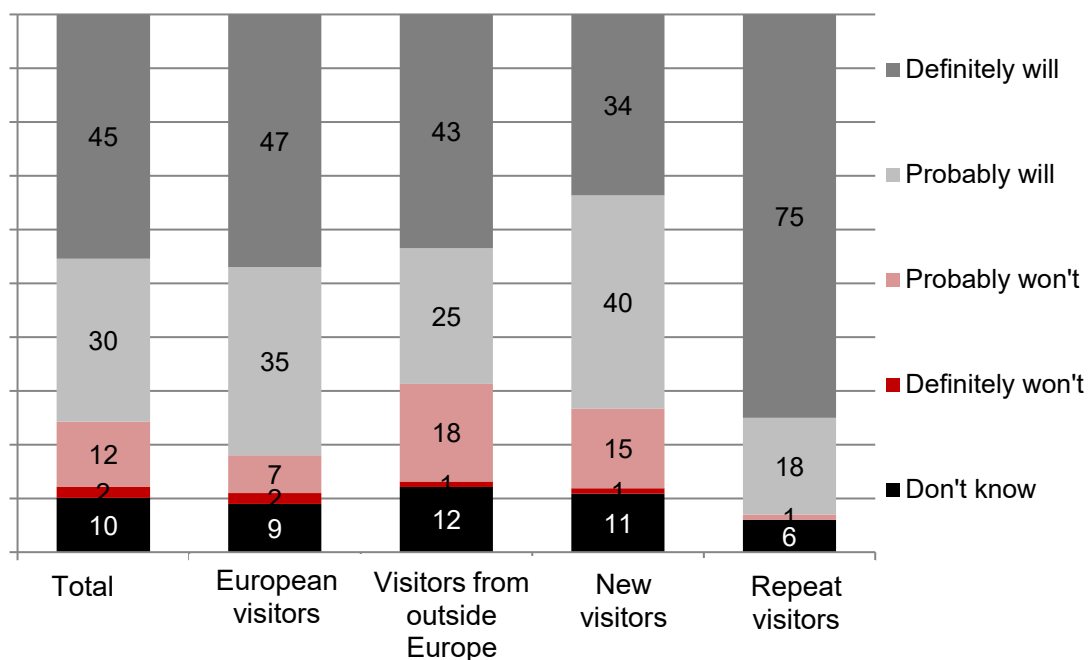
Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)

3.118   Staying visitors from overseas were also asked (for the first time) how likely they were to come to Wales **for a day trip** in the next few years. Not surprisingly because of the distance involved, the majority (91%) of overseas staying visitors were unlikely to do so. 6% said they were likely to do so and the remaining 3% were unsure.

3.119   Conversely the small proportion of overseas visitors visiting Wales on a day trip (8%) were asked how likely they were to come to Wales **for a leisure break or holiday** in the next few years. Almost eight in ten overseas day visitors to Wales said they would definitely or probably visit Wales again for a staying visit.

3.120 Reflecting the high levels of visitor satisfaction and the strong likelihood of returning to Wales in future, almost all overseas 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 (93%). This is higher than the level of definite recommendation seen in 2016 (at 89%).

3.121 Recommendation was very high across all visitor types, demographics and marketing segments.

3.122 There is a clear relationship between overall satisfaction and likelihood of re-visiting and recommendation; the proportion of overseas visitors likely to come back to Wales and the proportion likely to recommend Wales increase as visitor satisfaction with Wales overall as a place to visit increases (see Figure 3.22).

Figure 3.22: Overall satisfaction and likelihood of re-visiting / recommending Wales 2019 - %
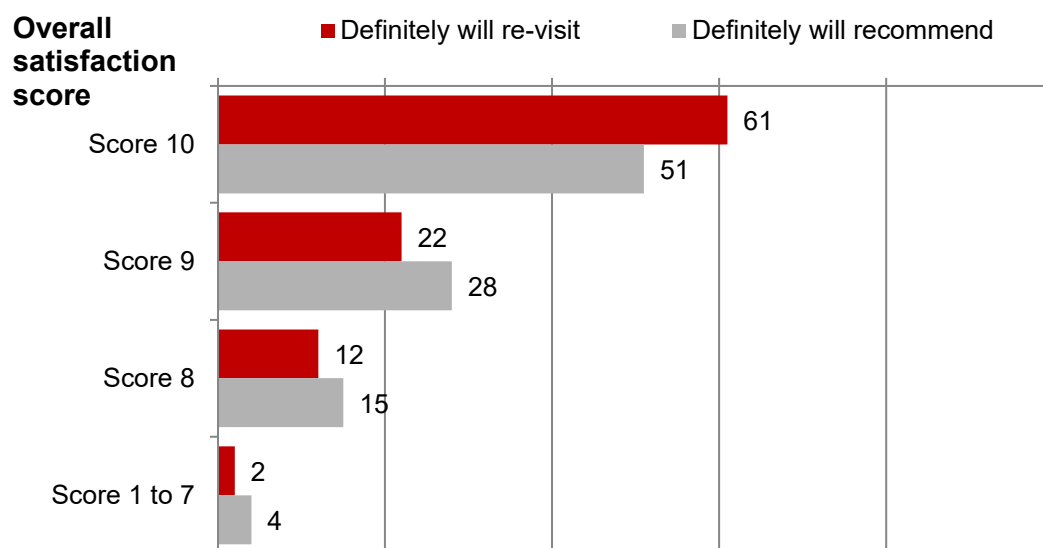
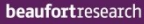*Base: 2019 Wales Visitor Survey – all overseas visitors Stage II (260)*

4. Conclusions

4.1   Europeans make up half of overseas visitors to Wales and the proportion of visitors coming from Europe has risen since 2016. European visitors are also the most frequent visitors to Wales. This needs to be monitored closely post-Brexit especially as the feeling of welcome in Wales is the highest-scoring dimension for visitor satisfaction. If Wales can sustain its warm welcome to European visitors and continue to promote this, then there are opportunities to mitigate any impacts of Brexit.

4.2   Recall of any advertising, marketing or communications about Wales was lower in 2019 than in previous years. Other factors such as personal recommendation, reviews on travel websites, cheap air fares and a favourable exchange rate were more likely to persuade overseas visitors to come to Wales. Word of mouth (either from friends or family) or recommendation via review sites such as TripAdvisor are therefore key in influencing overseas visitors to take a trip to Wales and in helping them choose their accommodation.

4.3   Overseas visitors are more likely to be taking their main holiday in Wales than UK staying visitors and to be travelling as a couple, rather than a family. In 2019, fewer visitors booked their accommodation and travel as a package than in previous years and more appear to be making their travel arrangements independently. This fits with the increase in the use of third party online accommodation booking sites and the rise of Airbnb seen in 2019.

4.4   Wales was the main or only holiday destination for almost half of overseas visitors, rising to six in ten of those from Europe. In addition, as was evident in the qualitative research, around half of overseas visitors stayed in several different Welsh locations during their visit. The high proportion of overseas visitors touring around the country during their trip suggests that the marketing of routes or trails around Wales would appeal to overseas visitors.

4.5   Overseas visitors' main prompted reason for visiting Wales was to relax and escape from the stresses of life. This was also evident amongst the

overseas participants in the qualitative study. Enjoying the countryside and visiting friends and family were also important prompted factors for visiting Wales.

4.6 Sense of place is particularly important to overseas visitors – over eight in ten were looking for *an experience that is distinct to Wales and that they could not have anywhere else.* Encouragingly, as in previous years, the majority thought some aspect of their visit included features that were distinctively Welsh (in particular, Wales' heritage sites and visitor attractions). They are also more likely than UK visitors to be interested in the Welsh language and to want to *see or hear the Welsh language during their visit.*

4.7 Almost all overseas visitors ate out during their visit to Wales, possibly linked to the very high proportion of ABC1s visiting. However, satisfaction was relatively low with most aspects of the culinary experience in Wales - especially value for money and the use of local or Welsh food on the menu in restaurants and cafés.

4.8 Digital information continues to grow in importance for overseas visitors, both in visit planning before their trip and during their stay. Over three quarters of overseas visitors went online to help plan their trip to Wales, while over half went online while on holiday in Wales to look for information. The increased use of online information while on holiday in Wales is perhaps linked to cheaper data roaming for overseas visitors.

4.9 While overall enjoyment with their visit to Wales was high and on a par with that of UK visitors, satisfaction levels with the value for money of certain aspects of Wales' offer are relatively low – for attractions and for eating out – even though the favourable exchange rate was a motivator to visit for some overseas visitors.

Annex A

Stage 1 questionnaire

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

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

S1 Firstly, do you speak Welsh? **IF YES** is that? (10)

Yes – fluently……………………………	1	➔ S2
Yes – but not fluently…………………	2	➔ S2
No……………………………………..	3	➔ S3

(IF WELSH SPEAKER)
S2 We can conduct this interview in English or Welsh – which would you prefer? (11)

English……………………………………	1
Welsh…………………………………….	2

(ASK ALL) - SHOWCARD A
S3 Which of these best describes the reason for your trip here today? (12)

Part of a holiday, **staying** in Wales away from home………………………	1	➔ Q1
Part of a holiday to visit friends or relatives, **staying** in Wales away from home……………………………………..	2	➔ Q1
Day visit to / in Wales – for a day trip / outing / non-routine visit……………….	3	➔ S4
Day visit to / in Wales – for routine business or routine shopping…………..	4	**THANK AND CLOSE**
On business………………………………	5	
For study…………………………………	6	
Other…………………………………….	7	

(IF DAY VISITOR S3 – CODE 3)
S4 Can I just check, will you be spending **three hours or more** away from home or your accommodation as part of your visit today – including travel? (13)

Yes…………………………………..	1	➔ Q2
No………………………………………..	2	➔ CLOSE

Q1 How many nights in total will you be staying in Wales? **WRITE IN**

_____ (14-15)

(ASK ALL)
Q2 And are you visiting today with any pets? (16) **CAN MULTI-CODE**

Yes – dog/s	1
Yes – other pet/s	2
No	3

Q3 Which country do you live in? (17-20m)

Wales……………....	1	Netherlands..	8
England……………...	2	Belgium........	9
Scotland…………....	3	Spain………..	A
Northern Ireland……	4	Italy…………	B
Republic of Ireland…	5	USA………....	C
France………………	6	Canada.........	D
Germany……………	7	Australia……	E

Europe other (specify)
_____

Outside Europe other (specify)
_____

CHECK QUOTAS AND CONTINUE

(IF LIVE IN WALES)
Q4 In which local authority area do you live? (21)

Anglesey…………	1	Merthyr Tydfil…	C
Blaenau Gwent….	2	Monmouthshire.	D
Bridgend…………	3	Neath Port Talbot	E
Caerphilly……….	4	Newport………….	F
Cardiff…………..	5	Pembrokeshire….	G
Ceredigion………	6	Powys…………….	H
Carmarthenshire..	7	Rhondda Cynon Taf	I
Conwy…………..	8	Swansea…………..	J
Denbighshire……	9	Torfaen……………	K
Flintshire……….	A	Vale of Glamorgan..	L
Gwynedd………..	B	Wrexham…………..	M

Q5	**(IF LIVE OUTSIDE OF WALES)** Is this your first visit to Wales?	(22)	

Q5 **(IF LIVE OUTSIDE OF WALES)** Is this your first visit to Wales? (22)

Yes……………………………….......... 1
No……………………………….......... 2
Don't know / can't remember…………..…........ 3

Q6 **(IF LIVE IN WALES)** Is this your first visit to this part of Wales? (23)

Yes……………………………….......... 1
No……………………………….......... 2
Don't know / can't remember…………..…........ 3

Q7 **(ASK ALL) – SHOWCARD B** Which of the following best describes your party on this visit? (24)
SINGLE CODE

Visiting alone……………………………….......... 1
A couple……………………………….......... 2
Family – with young children…………………… 3
Family – with older children……………….......... 4
Family – with young and older children………..... 5
Family – without children……………………… 6
Friends……………………………….......... 7
Organised group / society……………………… 8
Other……………………………….......... 9

Q8 How many people are in your visitor party today, including yourself?
WRITE IN NO. OF ADULTS & CHILDREN
Adults:
Children:

Q9 **Gender** (31)
Male……………………………….......... 1
Female……………………………….......... 2
Other ……………………………….......... 3
Prefer not to say………………………….......... 4

Q10 **Age** (32)
PLEASE WRITE IN EXACT AGE _____
IF REFUSE, PLEASE ASK FOR AGE BAND

16-19……………	1	55-64………………	6
20-24……………	2	65-74………………	7
25-34……………	3	75-84………………	8
35-44……………	4	85+…………………	9
45-54……………	5	Refused……………	A

Q11 **Working status** (36)

Working full time (30+ hrs per week)…… 1
Working part time (> 29 hrs per week)…. 2
Full time education………………………… 3
Retired……………………………….. 4
Looking after the home………………….. 5
Full time carer……………………………… 6
In training………………………………… 7
Other……………………………………… 8

Q12 **Status in household** (37)
READ OUT - The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source.

Chief income earner……………………….. 1
Other adult (aged 16+)………………….. 2

Q13 **Occupation of Chief Income Earner** (last job if retired) Actual job

_____

Position / grade

_____

Q14 **Social grade** (38)

AB……………………………………….. 1
C1………………………………………… 2
C2………………………………………… 3
DE………………………………………… 4

SHOWCARD C
Q15 What is your ethnic group?

White Welsh ………………………………………
White British/English/Scottish/Northern Irish ……..
White Irish…………………………………………..
White Gypsy or Irish Traveller……………………..
Other White……………………………………….
White and Black Caribbean………………………….
White and Black African……………………………
White and Asian…………………………………….
Other Mixed/Multiple ethnic background…………...
Indian……………………………………………….
Pakistani…………………………………………….
Bangladeshi………………………………………….
Chinese………………………………………………
Japanese……………………………………………..
Other Asian background……………………………..
African……………………………………………….
Caribbean…………………………………………….
Other Black/African/Caribbean background………..
Arab………………………………………………….
Any other ethnic group……………………………...

Q16 Do you or does anyone else in your party have any of the following conditions or impairments? You can tell me the letter next to each one if you prefer.

CAN MULTI-CODE

A	Mobility impairment (wheelchair user)………………	1
B	Mobility impairment (non-wheelchair user)………….	2
C	Blind……………………………………………………..	3
D	Partially sighted………………………………………...	4
E	Deaf……………………………………………………...	5
F	Partial hearing loss………………………………….….	6
G	Learning difficulties…………………………………….	7
H	Long-term illness (e.g. AIDS, arthritis, cancer,	8
	diabetes)…………………………………………..……	
	None of these ………………………………………...	9

SHOWCARD E

Q17 Have you seen or heard any of these types of advertising, marketing and publicity for Wales before your visit today?

CAN MULTICODE

TV advertising…………………………....................	1
TV programme………………………………………..	2
Cinema advertising……………………………………..	3
Radio advertising or programme……………….	4
Read an article in a newspaper or magazine	5
(print or online)……………………………………..	6
Saw an advert, flyer or supplement in a	7
newspaper / magazine…………………………..	8
Outdoor advertisement (e.g. posters, bus sides,	9
airports, stations)………………………………….	A
Online ad (inc. still or moving ads)………………	B
Social media (online e.g. Facebook, Twitter etc)…	C
The official tourist board website www.visitwales.com..	D
Other website (e.g. TripAdvisor)…………………..	E
Word of mouth / conversation with others in person………………………………………………..	F
Direct mail / flyer………………………………….…	G
Email newsletter…………………………………….…	H
Other……………………………………………..……	I
None of these …………………………………………	J

Q18 Have you heard of a campaign called The Wales Way?

Yes	1
No	2
Don't know	3

SHOWCARD F
IF YES TO Q18
Q19 To what extent did The Wales Way influence your decision to visit Wales? *Scale of 1-10*

1	- No influence at all	1
2		2
3		3
4		4
5		5
6		6
7		7
8		8
9		9
10	- Only reason I visited	A

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 <u>ONLY</u> 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:

Signature	**Date of interview:**			
		(54)	(55)	(56)

WRITE IN YOUR INTERVIEWER NUMBER ⟶

B01919	**Accompanied**	Yes 1 No 2	**Supervisor signature:**	**QUOTA** (57) UK DAY 1 UK STAYING 2 OVERSEAS STAYING 3 OVERSEAS DAY 4

Annex B

Stage 2 questionnaire

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 <u>last year</u> 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 <u>UK</u> country was my main holiday destination
3. Another <u>European</u> country was my main holiday destination
4. I toured around the UK and Europe, visiting several different countries

Don't know / can't remember

ASK IF STAYING VISITOR
Q5 And thinking about your time in Wales, were you based in one location during your recent visit or did you stay overnight in several places or tour around the country? **SINGLE CODE**

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

Don't know / can't remember

SECTION 2 – TRAVELLING IN AND AROUND WALES

ASK IF OVERSEAS VISITOR
Q6   What was your main method of transport to reach Britain? **SINGLE CODE - RECORD DETAILS OF STATION / FERRY PORT / AIRPORT**

Train – including Channel Tunnel **(specify arrival station)** _____
Ferry – car passenger **(specify arrival port)** _____
Ferry – foot passenger **(specify arrival port)** _____
Plane **(specify arrival airport)** _____
Other **(please specify how and where arrived)** _____

Don't know / can't remember

ASK IF DAY OR STAYING VISITOR FROM OUTSIDE WALES
Q7   What was your main method of transport to reach Wales?
READ OUT AS NECESSARY - SINGLE CODE - RECORD IN COLUMN A

ASK ALL
Q8   What method/s of transport did you use to get around Wales [IF STAYING VISITOR] / to get to [SITE NAME] on the day we interviewed you [IF DAY VISITOR]?
READ OUT AS NECESSARY - CODE ALL MENTIONED – COLUMN B

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

SECTION 3 – ACTIVITIES UNDERTAKEN & MOTIVATIONS FOR VISITING

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

IF MORE THAN ONE CODED AT Q9 ASK Q10

Q10　And which one was your <u>main</u> 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 <u>take part in</u> 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 <u>attend</u> 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)   **GO TO Q15**
Nature-based attraction (e.g. gardens)
Science / technology centre
Scenic / steam / historic railway
Theme / amusement park

A location associated with a TV series, film or literature
General sightseeing   **GO TO Q16**
Other **(please specify)**
Don't know / can't remember

ASK IF CODE 1-10 AT Q14

Q15 Thinking about the <u>attractions</u> 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
2. Blaenau Gwent
3. Bridgend
4. Caerphilly
5. Cardiff
6. Ceredigion
7. Carmarthenshire
8. Conwy
9. Denbighshire
10. Flintshire
11. Gwynedd
12. Merthyr Tydfil
13. Monmouthshire

14. Neath Port Talbot
15. Newport
16. Pembrokeshire
17. Powys
18. Rhondda Cynon Taff
19. Swansea
20. Torfaen
21. Vale of Glamorgan
22. Wrexham
23. Various

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

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

- Quality
- Service
- Value for money
- Overall satisfaction

READ OUT
1 – Very dissatisfied
2
3
4
5
6
7
8
9
10 – Very satisfied

Don't know / can't remember
Not applicable

ASK IF STAYING VISITOR AND STAYED IN COMMERCIAL ACCOMMODATION
Q23   How did you book your accommodation or package?
DO NOT PROMPT – SINGLE CODE

Directly with the provider (phone / email / the provider's website)
Through a third party online accommodation site (e.g. booking.com, expedia, laterooms.com)
Through a deals site (e.g. Groupon, kgb, etc.)
Through a link on the VisitWales.com website
Through a travel agent or tour operator
Through a tourist information centre
Through Airbnb
Just turned up ➔ **SKIP Q24**
Other **(please specify)** ➔ **SKIP Q24**

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

ASK IF STAYING VISITOR AND BOOKED IN ADVANCE
Q24   And did you…..? **READ OUT – SINGLE CODE**

Book accommodation and travel together via the same provider as part of a package
Book accommodation and travel separately with different providers
Book accommodation only – no travel booked

Don't know / can't remember

ASK IF STAYING VISITOR AND STAYING IN COMMERCIAL ACCOMMODATION
Q25   How important were the following to you when booking your accommodation in Wales during this holiday / trip? **READ OUT – RANDOMISE ORDER**
a) The official grading or star rating of the accommodation (that is, through an organisation such as Visit Wales or the AA)
b) The scores given by other travellers through websites such as TripAdvisor, Booking.com etc.

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

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 <u>before</u> 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 <u>before</u> 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 <u>during</u> 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 <u>during</u> 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 <u>during</u> 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 <u>apart from the weather</u>? **PROBE** – Anything else?
RECORD VERBATIM

_____
_____
_____

Nothing
Don't know

ASK ALL
Q40   Overall, would you say your trip to/in Wales was….?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

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

Don't know

ASK ALL
Q41   How likely are you to make <u>another visit in / to Wales</u> 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 <u>for a day trip</u> 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 <u>for a leisure break or holiday</u> 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 <u>best</u> 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

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┌─────────────────────────────────────────────────────────────────┐
│  ANY PARTNER-SPECIFIC QUESTION TO BE ADDED HERE                   │
│                                                                   │
│                                                                   │
│                                                                   │
└─────────────────────────────────────────────────────────────────┘
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ASK ALL

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

_____
_____
_____

No other comments

ASK ALL

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

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

Yes - willing to be re-contacted - **RECORD NAME AND TELEPHONE NUMBER**
No

Thanks very much for your time.

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

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

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

Thanks again and goodbye.

Annex C

Interviewing locations

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

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	Monmouthshire County Council
	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	
	Dare Valley Country Park Garwnant McArthurGlen Monmouth Town Centre	Rhondda Cynon Taf County Borough Council Natural Resources Wales Bridgend Council Monmouthshire County Council
	National Museum Cardiff	
	Penarth Pier	Vale of Glamorgan Council
	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	

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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.