

# Research Report

Wales Visitor Survey 2016

Museums, Archives and  
Libraries Division



Prepared for:  
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# 1. Executive summary

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## 1.1 Introduction

This report focuses on **visitors to sites of interest to the Museums, Archives and Libraries Division (MALD)**<sup>1</sup>; **1,122** interviews were conducted at Stage 1 and a further **577** were conducted at Stage 2 with visitors to 10 locations across Wales. The data will be broken down by four broad regions and we will draw comparisons with the All Wales average. The specific questions about visitors' perceptions of museums in Wales, which were included in the survey by MALD, were only asked of visitors to the ten sites included within this report.

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

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

## 1.2 Key findings

### **Visitor profile:**

The proportion of visitors to the ten sites of interest to MALD coming from England, Scotland and Northern Ireland was similar to the proportion of visitors who came from across Wales (48% and 45% respectively). However, the majority of visitors to the sites in West Wales were from Wales (89%), with only 10% coming from other countries in the UK. Conversely, three quarters of the visitors (76%) to the sites in North Wales were from England (mainly), Scotland and Northern Ireland, while around one in five were from Wales (21%). Only 7% of visitors on average across all the MALD sites were from overseas (this rose to 13% of visitors to South Wales).

Most visitor groups to the MALD selected sites are either families with young children or couples (31% and 29% respectively), which reflects the All Wales profile. The average number of people in each visiting party is 3.8 (2.7 adults and

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<sup>1</sup> Sites of interest to MALD:

**North Wales:** Beaumaris Town Centre, Llanberis, Llandudno Promenade, Wrexham Town Centre

**Mid Wales:** Aberystwyth Promenade, Brecon town centre

**West Wales:** National Botanic Garden of Wales, Tenby town centre

**South Wales:** Cardiff Castle, Chepstow town centre.

1.1 children), all of which are very similar to the All Wales average of 3.7 (2.7 adults and 1.0 children).

Over four in ten of staying visitors to the MALD selected sites were either first time visitors to Wales or new to this part of Wales (43%), which is slightly higher than the average across the rest of Wales (at 36%).

***Trip profile:***

The vast majority of visitors to the MALD selected sites were on a day trip when interviewed (86%); this is similar to the All Wales average of 88%. The proportion of staying visitors to MALD selected sites is slightly higher than the across Wales overall (14% compared to 12% overall). Staying visitors stayed an average of 5.7 nights in Wales.

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

Visitors to MALD selected sites were most likely to have come to the area to visit places, historical / religious sites and attractions (59%), higher than was the case among visitors to Wales as a whole (51%). This is probably higher across MALD sites than the All Wales average because of the interviewing locations selected by MALD, such as Cardiff Castle. They were also slightly more likely to give shopping as a reason for visiting (at 15% compared with 12% overall) or visiting for a city break / visiting a large town (at 12% compared with 8% overall). Again this is because several of the sites selected by MALD are town centres (e.g. Beaumaris, Chepstow, Wrexham).

Looking in more detail at the specific activities undertaken by visitors interviewed across all 10 MALD sites, the four most popular activities were visiting a castle or historic attraction (41%), general sightseeing (30%), visiting gardens (20%) or visiting a beach (19%).

Around one in five visitors on average across All Wales said they had visited a museum or heritage site during their visit to Wales, while slightly smaller proportion of visitors to the MALD selected sites said the same (16%). However, this rose to 23% amongst visitors to South Wales. The proportion is probably higher in South Wales because of the higher concentration of museums generally and the National Museum Cardiff is very close to one of the interviewing locations in the South (Cardiff Castle). The proportion of visitors saying they had visited a museum during their stay was lowest in West Wales (only 7% cf. 16% on average across all MALD selected sites). Therefore, the most popular individual activities undertaken reflect the choice of interviewing locations selected by MALD

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

Visitors to all MALD sites were highly satisfied with their visit, as was the case among visitors across Wales. Almost eight out of ten visitors to MALD's sites

(76%) gave a score of either 9 or 10 for *Wales overall as a place to visit* – the average score was 9.2/10 (cf. 9.2/10 All Wales mean score).

Wales exceeded expectations for around half of visitors to the sites that MALD were interested in, with 51% saying that their trip was much better than expected (rising to 55% amongst visitors to South Wales). Around four in ten felt that their expectations had been met (44%). Only 4% of visitors to the 10 sites said that their trip was not as good as expected.

Virtually all visitors to the MALD sites said they were likely to return in future (92%); 83% said they would definitely visit again, while 9% would probably visit again. These proportions reflect similar findings across the whole of Wales. Only a very small proportion of visitors (6%) said they were not likely to make another visit across the MALD sites.

Reflecting the high levels of visitor satisfaction and strong likelihood of returning to Wales in future, virtually all visitors to Monmouthshire said that they would recommend it as a place to visit (96%).

#### ***Visitors' perceptions of museums:***

Visitors to the 10 sites across Wales that are of interest to MALD were asked whether they agreed or disagreed with seven statements about museums.

Two thirds of visitors to museums in Wales agreed that they 'enjoy the experience of visiting museums', while similar proportions also agreed that they could 'easily find out about museums in Wales' if they wanted to (65%) or that museums are 'friendly welcoming places' (64%).

Just over half of visitors to museums in Wales said they would either recommend the museums they had visited while in Wales or would revisit the museum/s they had visited during their trip to Wales (54% and 51% respectively).

One in six visitors (61%) also disagreed with the statement: 'museums are not really for people like me' but one in ten visitors (11%), however, did agree that museums were not for them. In addition, a sizable minority (14%) did not think that 'museums in general have moved with the times'. Nevertheless over half of visitors did disagree with this statement.

#### ***Visiting museums in Wales during their visit and reasons for doing so:***

Visitors were asked how many times if at all they had visited a museum in Wales during the last 12 months.

Half of visitors to the MALD sites across Wales had visited a museum at least once in the last 12 months (50%); 16% had visited once, 20% had been two or

three times and 14% had been four or more times. However, just over a quarter of visitors had not been to any museum during the last 12 months, while 24% said they couldn't remember / didn't know.

Visitors who had visited museums in the last 12 months were asked why they had visited the museum. They were prompted with a list of reasons and asked to choose the reasons that best applied to them.

Over half of all visitors who had visited a museum in the last 12 months said they had visited to gain a deeper insight into a subject (53%). This was followed by the following reasons: they visited in order to experience awe-inspiring, fascinating or beautiful things or places (50%), to spend time with other people in nice places (41%), to find out about places they are visiting or staying in (39%) and to reflect and contemplate (28%).

Visitors who did not visit any museums during their visit to Wales were also asked why they had not. Almost half of them said it was because their trip was taken up with other activities (47%), while a further 13% said they simply had not thought about visiting a museum. Around one in eight (12%) said they were not interested in museums generally and so would not consider visiting at all.

## 2. Aims and objectives

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### 2.1 Aims and objectives

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

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

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

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

This summary report focuses on interviews conducted across Wales at the 10 sites of interest to MALD. The data is sometimes broken down by region rather than site. **NB small base size for Mid Wales:**

#### North Wales

- Beaumaris town centre
- Llanberis
  
- Llandudno Promenade
- Wrexham town centre

#### Mid Wales

- Aberystwyth Promenade
- Brecon town centre

#### West Wales

- National Botanic Garden of Wales
- Tenby town centre

#### South Wales

- Cardiff Castle
- Chepstow town centre



### 3. Methodology

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#### 3.1 Overview of approach

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

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

Interviews were conducted with adults aged 16+ who were on a non-routine trip to the area (day trip or staying visitor). General demographic information such as age, gender, social class, ethnicity, disability, residence and composition of the visiting party was gathered in a short face-to-face survey, as well as awareness of advertising, marketing and publicity for Wales (pre-visit). **1,122** interviews were conducted at Stage 1 across the **10 locations** of interest to MALD.

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

A longer, more in-depth interview was conducted by telephone with a sample of visitors interviewed at Stage 1, after their visit ended. This gathered feedback, post-visit, on their experience as a whole, including perceptions of Wales as a tourism destination, likelihood to revisit and whether they would recommend Wales to friends and relatives. A total of **577** telephone interviews were conducted with visitors to the 10 sites of interest to MALD. The specific questions about visitors' perceptions of museums in Wales, which were included in the survey by MALD, were only asked of visitors to the ten sites included within this report.

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

Fieldwork took place between 11 June and 3 November 2016.

#### 3.2 Samples achieved at Stages 1 and 2 across the sites in each region of Wales

Table 2: Locations	Stage 1 Interviews	Stage 2 Interviews
North Wales <sup>2</sup>	418	224
Mid Wales <sup>4</sup>	58	35 <sup>3</sup>
West Wales <sup>4</sup>	230	126
South Wales <sup>4</sup>	416	192
<b>TOTAL</b>	<b>1122</b>	<b>577</b>

<sup>2</sup> **North Wales:** Beaumaris Town Centre, Llanberis, Llandudno Promenade, Wrexham Town Centre

**Mid Wales:** Aberystwyth Promenade, Brecon town centre

**West Wales:** National Botanic Garden of Wales, Tenby town centre

**South Wales:** Cardiff Castle, Chepstow town centre.

<sup>3</sup> Small base size.

## 4. Research findings

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### 4.1 Visitor profile

The proportion of visitors to the ten sites of interest to MALD coming from England, Scotland and Northern Ireland was similar to the proportion of visitors who came from across Wales (48% and 45% respectively). However, the majority of visitors to the sites in West Wales were from Wales (89%), with only 10% coming from other countries in the UK. Conversely, three quarters of the visitors (76%) to the sites in North Wales were from England (mainly), Scotland and Northern Ireland, while around one in five were from Wales (21%). Only 7% of visitors on average across all the MALD sites were from overseas (this rose to 13% of visitors to South Wales). However, this is higher than the average across the whole of Wales (only 4% of visitors are from overseas).

The split in the gender of visitors to the MALD sites is skewed more towards female visitors, but this is in line with the All Wales average.

The age profile of visitors to the MALD sites was also similar to the All Wales average. However, visitors to South Wales were younger (26% 16-34s cf. 21% on average across all the MALD sites), while visitors to West Wales and Mid Wales were more likely to be aged 55 + (55% and 58% respectively).

Of note is the high prevalence of ABC1<sup>4</sup> visitors: these make up over two thirds of visitors to the MALD sites (67%), while C2DE visitors account for a third (33%). These proportions are identical to the All Wales average. Sites in South Wales attracted the highest proportion of ABC1 visitors (74% cf. 67% across all MALD sites) while North Wales had the highest proportion of C2DE visitors (49% cf. 33% on average across all MALD sites).

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<sup>4</sup> Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

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

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

**C2:** Skilled manual workers

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

<b>Table 3: Demographic profile of visitors</b>	<b>MALD TOTAL %</b>	<b>North Wales%</b>	<b>Mid Wales %</b>	<b>West Wales %</b>	<b>South Wales %</b>	<b>ALL Wales %</b>
<b>Area of residence</b>						
Wales	48	21	54	89	40	59
Rest of the UK	45	76	43	10	47	37
Overseas	7	3	3	1	13	4
<b>Gender</b>						
Male	45	46	76	41	44	44
Female	55	54	24	59	56	56
<b>Age</b>						
16 - 24 years	5	3	1	2	7	7
25 – 34 years	16	19	9	8	19	15
35 – 44 years	17	19	3	15	18	20
45 – 54 years	22	24	27	20	21	19
55 - 64 years	20	18	18	26	19	18
65+ years	20	15	40	29	16	20
Refused	1	2	-	-	-	1
<b>Social grade</b>						
AB	36	31	21	36	40	32
C1	31	21	49	31	34	36
C2	22	33	14	20	17	20
DE	11	16	16	13	7	13
<b>Welsh speaking</b>						
Fluent	7	5	15	16	4	7
Non-fluent	4	<1	<1	11	4	7
Non-Welsh speaker	88	95	85	74	93	85
<b>Ethnicity</b>						
White Welsh / British	84	91	72	92	77	89
White other	10	4	21	5	16	6
Non-white / other	6	5	7	3	7	4

Bases = Stage 1 2016: All Wales (6,652); MALD Total (1,122); North Wales (418); Mid Wales (58); West Wales (230); South Wales (416). NB small base size.

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

Most visitor groups to the MALD selected sites are either families with young children or couples (31% and 29% respectively), which reflects the All Wales profile. A further 11% are visiting with friends (similar to Wales as a whole), while 6% visit alone. The average number of people in each visiting party is 3.8 (2.7 adults and 1.1 children), all of which are very similar to the All Wales average of 3.7 (2.7 adults and 1.0 children).

Over four in ten of staying visitors to the MALD selected sites were either first time visitors to Wales or new to this part of Wales (43%), which is slightly higher than the average across the rest of Wales (at 36%). The average number of visits to Wales / this part of Wales was 3.8 in the last 3 years (slightly lower than the all Wales average 4.2).

However, day visitors were much more likely to be frequent visitors, having taken on average 10.8 visits to Wales / this part of Wales in the last year. However, this is slightly lower than the average across Wales (13.1) – see Table 4 below.

<b>Table 3: Demographic profile of visitors</b>	<b>MALD TOTAL %</b>	<b>North Wales%</b>	<b>Mid Wales %</b>	<b>West Wales %</b>	<b>South Wales %</b>	<b>ALL Wales %</b>
<b>Type of visiting party</b>						
Family with young children	31	28	18	24	38	32
Couple	29	38	23	36	22	28
Friends	11	8	9	11	13	12
Family without children	8	9	10	10	6	7
Family with older children	7	8	8	3	8	5
Visiting alone	6	1	30	6	8	8
Family with younger and older children	3	4	-	5	2	3
Organised group / society	3	3	-	6	2	2
Other	1	<1	-	-	2	1
Refused	<1	2	<1	-	<1	1
<b>Average size of party</b>						
Average number of adults	2.7	3.1	2.7	2.6	2.6	2.7
Average number of children	1.1	1.3	0.6	0.7	1.2	1.0
Average total number of people	3.8	4.4	3.3	3.3	3.8	3.7
<b>Frequency of visiting in last three years (Staying visitors)</b>						
Stage 2 bases in brackets	(409)	(190)	(27)	(79)	(113)	(1,937)
Once	43	37	41	20	68	36
2 – 3 times	28	29	30	35	19	29
4 – 6 times	14	16	19	19	4	16
7 – 10 times	6	7	4	5	5	6
More than 10 times	10	9	7	20	4	12
Don't know	<1	1	-	-	-	<1
<b>AVERAGE</b>	<b>3.8</b>	<b>3.9</b>	<b>3.5</b>	<b>5.5</b>	<b>2.4</b>	<b>4.2</b>

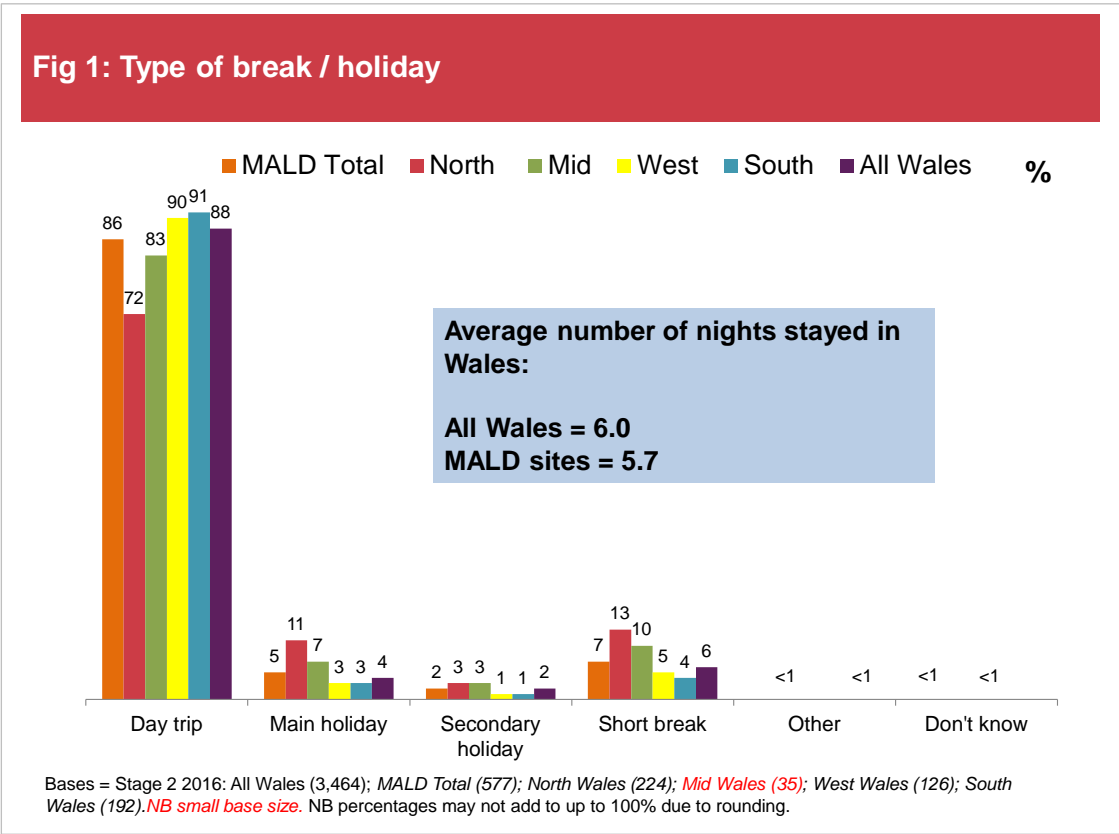
<b>Frequency of visiting in last year (Day visitors)</b>						
Stage 2 bases in brackets	(168)	(34)	(8)	(47)	(79)	(1,527)
Once	15	21	-	4	20	13
2 – 3 times	18	24	13	9	22	12
4 – 6 times	18	29	13	13	18	15
7 – 10 times	12	12	-	21	8	10
11 – 20 times	9	3	38	15	5	13
More than 20 times	27	12	38	36	28	35
Don't know	1	-	-	2	-	2
<b>AVERAGE</b>	<b>10.8</b>	<b>6.7</b>	<b>15.9</b>	<b>14.3</b>	<b>10.0</b>	<b>13.1</b>

Bases = Stage 1 2016: All Wales (6,652); MALD Total (1,122); North Wales (418); Mid Wales (58); West Wales (230); South Wales (416). *NB small base size.*  
 NB percentages may not add to up to 100% due to rounding.

## 4.2 Trip profile

The vast majority of visitors to the MALD selected sites were on a day trip when interviewed (86%); this is similar to the All Wales average of 88%. Visitors to South Wales sites were more likely to be day visitors (91%), while visitors to sites in North Wales were slightly less likely to be day-trippers (72%).

The remaining 14% of visitors to MALD selected sites were staying in Wales, most commonly on a short break (7%). However, staying visitors who were interviewed at the MALD selected sites were staying in Wales for slightly fewer nights on average than visitors to sites across Wales (5.7 cf. 6.0 across Wales) – see Figure 1 below.

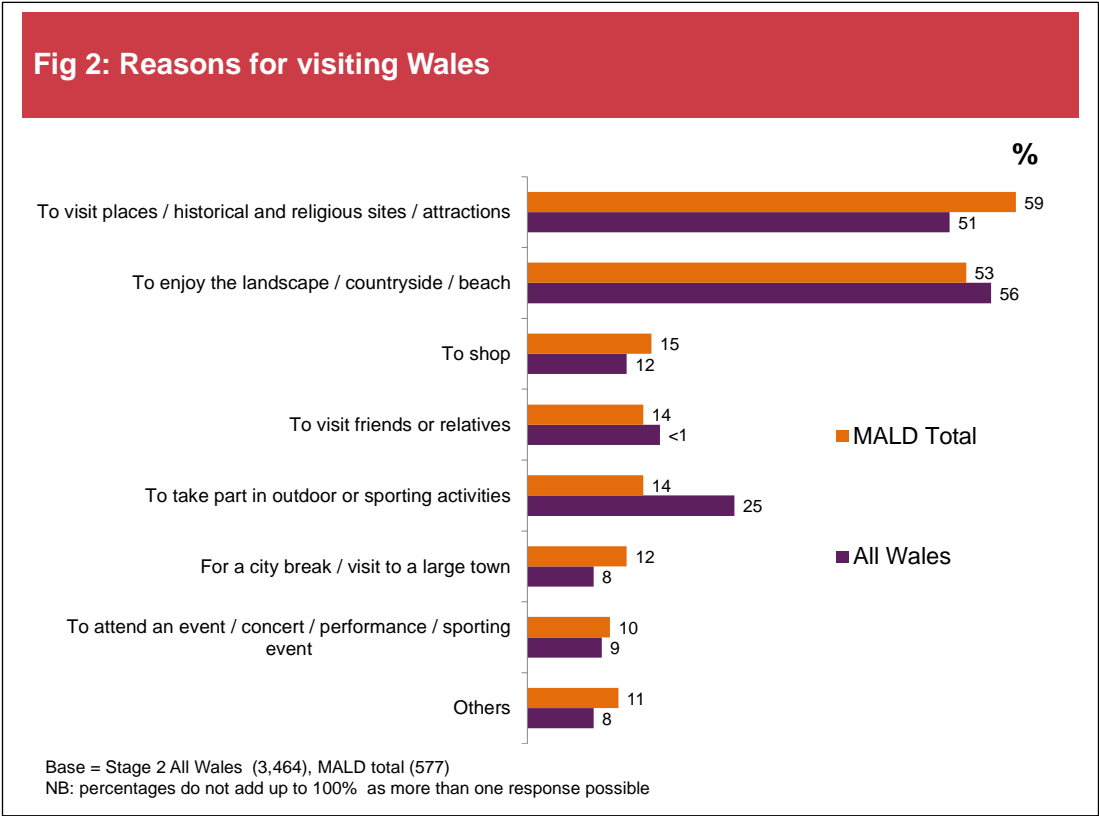


### 4.3 Motivations for visiting and activities undertaken

#### 4.3.1 Reasons for visiting

Visitors to MALD selected sites were most likely to have come to the area to visit places, historical / religious sites and attractions (59%), higher than was the case among visitors to Wales as a whole (51%). This is probably higher across MALD sites than the All Wales average because of the interviewing locations selected by MALD, such as Cardiff Castle. They were also slightly more likely to give shopping as a reason for visiting (at 15% compared with 12% overall) or visiting for a city break / visiting a large town (at 12% compared with 8% overall). Again this is because several of the sites selected by MALD are town centres (e.g. Beaumaris, Chepstow, Wrexham).

Conversely, visitors at MALD selected sites were slightly less likely to say they had come to enjoy the landscape / countryside / beach than was the case for Wales overall (53% of visitors at MALD selected sites compared with 56% overall) or to take part in outdoor or sporting activities (mentioned by 14% of visitors at MALD selected sites compared with 25% overall) - see Figure 2 below.



#### 4.3.2 Main activities undertaken while in Wales

Looking in more detail at the specific activities undertaken by visitors interviewed across all 10 MALD sites, the four most popular activities were visiting a castle or

historic attraction (41%), general sightseeing (30%), visiting gardens (20%) or visiting a beach (19%). Mentions of visiting castles / historic attractions are considerably higher than the average across All Wales sites because Cardiff Castle was one of the MALD selected sites, while visiting gardens was also noticeably higher than average because the National Botanic Gardens of Wales was also one of the sites selected by MALD.

Around one in five visitors on average across All Wales said they had visited a museum or heritage site during their visit to Wales, while slightly smaller proportion of visitors to the MALD selected sites said the same (16%). However, this rose to 23% amongst visitors to South Wales. The proportion is probably higher in South Wales because of the higher concentration of museums generally and the National Museum Cardiff is very close to one of the interviewing locations in the South (Cardiff Castle). The proportion of visitors saying they had visited a museum during their stay was lowest in West Wales (only 7% cf. 16% on average across all MALD selected sites).

Therefore, the most popular individual activities undertaken reflect the choice of interviewing locations selected by MALD – see Table 5 below for more details.

<b>Table 5: Most popular individual activities</b>	<b>MALD Total %</b>	<b>North Wales %</b>	<b>Mid Wales %</b>	<b>West Wales %</b>	<b>South Wales %</b>	<b>ALL Wales %</b>
Castle or other historic attraction	41	17	14	6	77	24
General sightseeing	30	31	34	17	36	27
Visit gardens	20	9	3	51	8	14
Visit the beach	19	46	21	12	8	23
Visit a museum or heritage centre	<b>16</b>	<b>10</b>	<b>21</b>	<b>7</b>	<b>23</b>	<b>19</b>
Visit a nature-based attraction	15	10	3	29	10	13
Visit country parks / forest parks	14	17	17	16	11	22
Visit a religious site	7	4	2	6	9	7
Walking more than 2 miles	7	14	7	4	4	14
Wildlife watching	6	9	3	9	3	7
Visit an industrial heritage attraction	5	7	2	3	7	7
Visiting a scenic / steam / historic railway	5	8	21	2	4	5
Visit a wildlife attraction / nature reserve	5	5	3	10	1	10
Walking less than 2 miles	5	7	2	6	3	6

*Bases = Stage 2 2016: All Wales (3,464); MALD Total (577); North Wales (224); Mid Wales (35); West Wales (126); South Wales (192). NB small base size. NB percentages may not add to up to 100% due to rounding.*

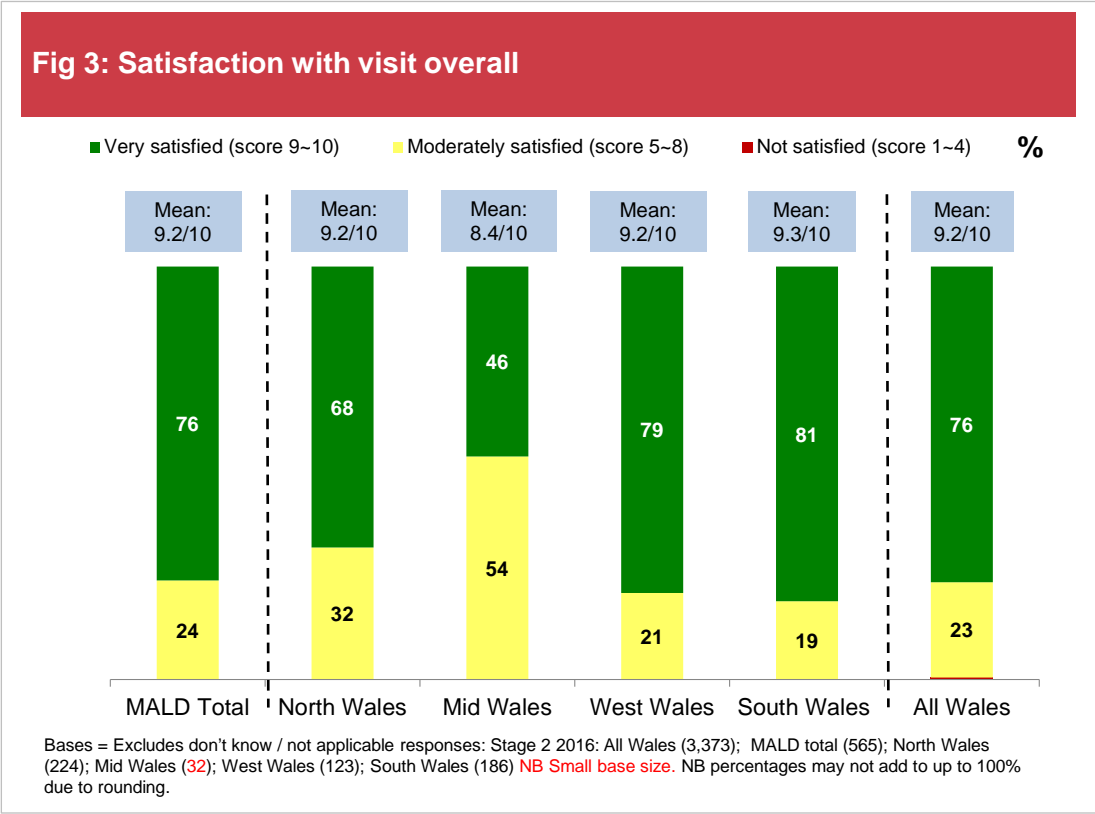


## 4.4 Satisfaction with overall experience, revisiting and recommending

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

Visitors to all MALD sites were highly satisfied with their visit, as was the case among visitors across Wales. On a scale of 1 to 10, where 1 was ‘very dissatisfied’ and 10 was ‘very satisfied’, almost eight out of ten visitors to MALD’s sites (76%) gave a score of either 9 or 10 for *Wales overall as a place to visit* – the average score was 9.2/10 (cf. 9.2/10 All Wales mean score).

A further 24% gave more moderate scores of between 5 to 8 / 10, but none of the visitors to any of the MALD sites were dissatisfied with their visit – see Figure 3 below.

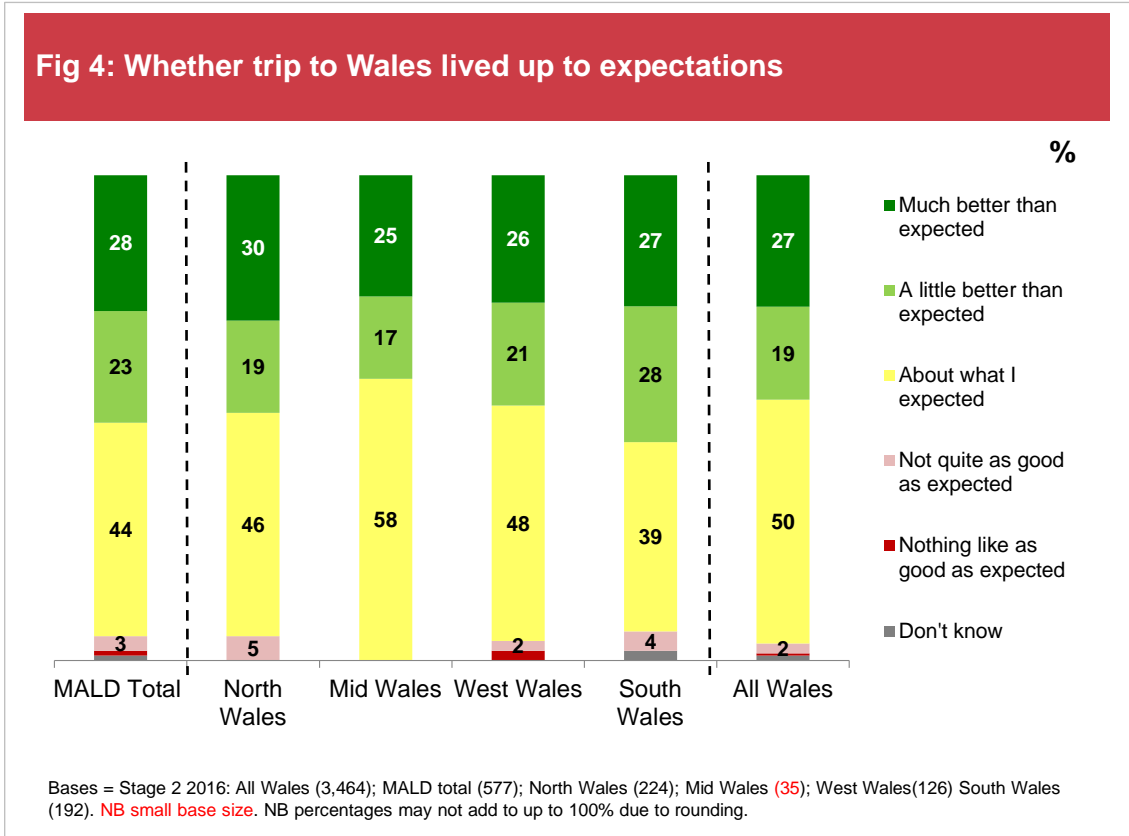


Visitors to Cardiff Castle and Chepstow town centre in South Wales and Tenby town centre and the National Botanic Gardens of Wales in West Wales were most likely to be very satisfied as eight in ten visitors gave a score of 9 or 10 / 10 (81% in South Wales and 79% in West Wales).

### 4.4.2 Expectations

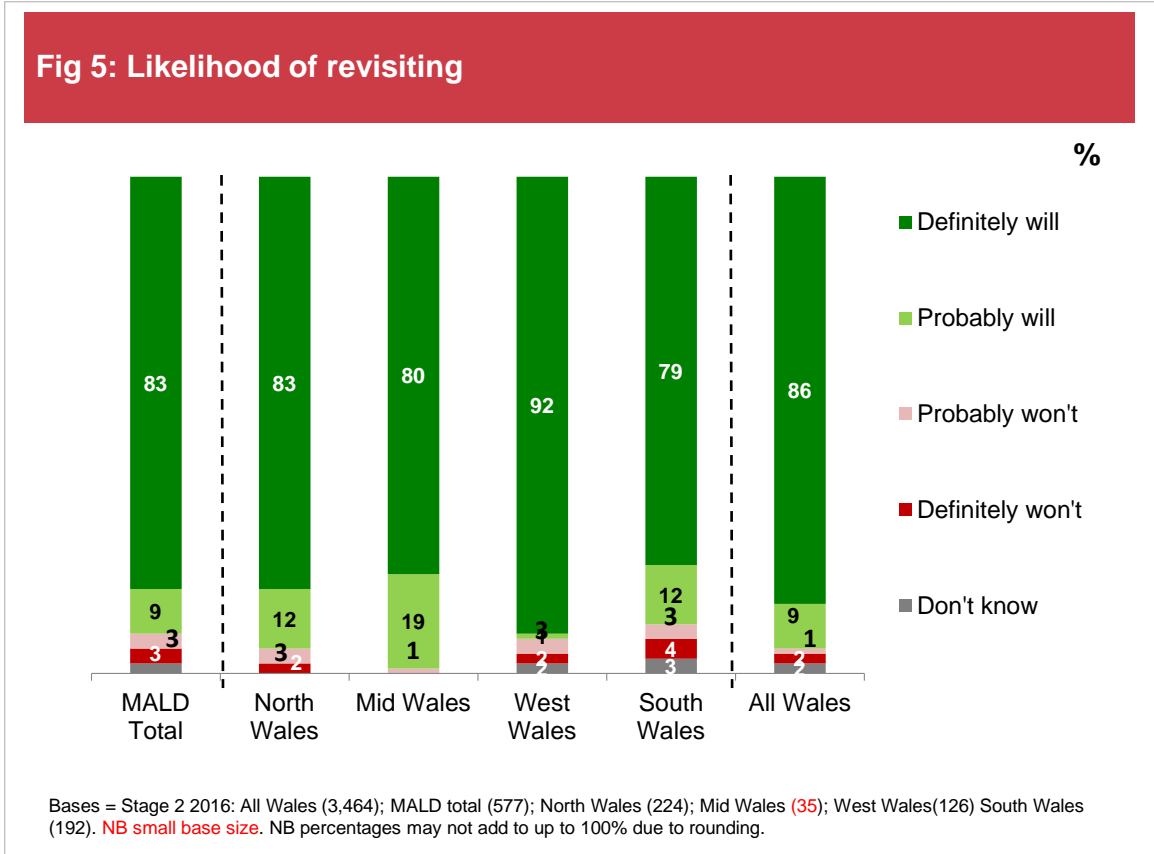
Wales exceeded expectations for around half of visitors to the sites that MALD were interested in, with 51% saying that their trip was much better than expected (rising to 55% amongst visitors to South Wales). Around four in ten felt that their expectations had been met (44%). Only 4% of visitors to the 10 sites said that their trip was not as good as expected.

Expectations about their trip amongst visitors to MALD’s chosen sites generally mirrored those of visitors across the whole of Wales, but slightly more said it was better than expected across the MALD sites (51% compared to 46% across Wales)- see Figure 4 below.



4.4.3 Returning to Wales in future

Virtually all visitors to the MALD sites said they were likely to return in future (92%); 83% said they would definitely visit again, while 9% would probably visit again. These proportions reflect similar findings across the whole of Wales. The proportion saying they would definitely visit again was particularly high among visitors to West Wales (92% cf. 83% MALD total). Only a very small proportion of visitors (6%) said they were not likely to make another visit across the MALD sites – see Figure 5 below.



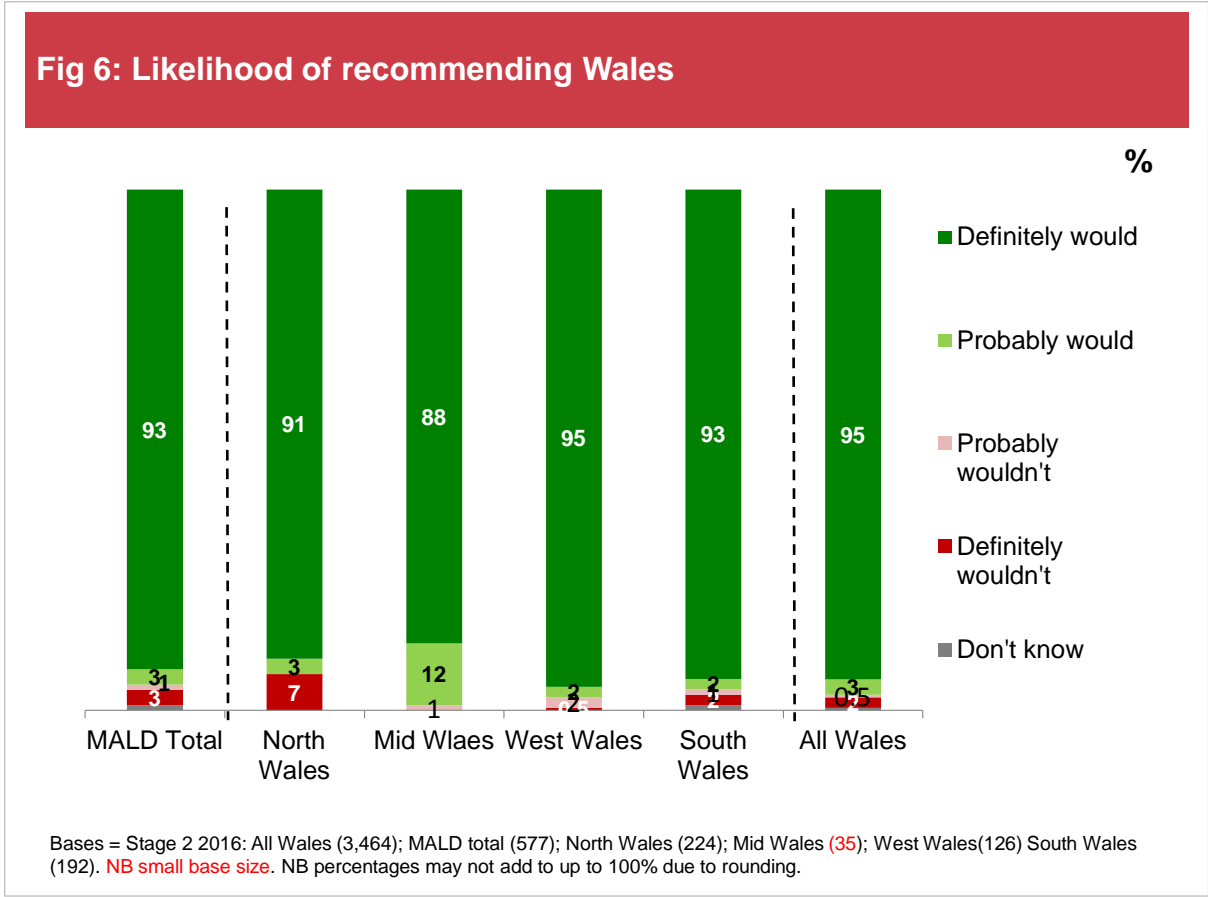
As might be expected, visitors who lived in Wales were most likely to say that they would definitely visit again (86%), although 85% of visitors from the rest of the UK and 43% of overseas visitors to the area said the same.

Similarly, 88% of repeat visitors said they would definitely visit again. However, 63% of new visitors also said that they would definitely return to Wales for another visit.

4.4.4 Recommendation

Reflecting the high levels of visitor satisfaction and strong likelihood of returning in future, virtually all visitors to sites that MALD was interested in said that they would recommend Wales as a place to visit (96%); 93% would definitely recommend, and 3% would probably recommend the country to friends and family. Only 4% said that they would not recommend Wales as a place to visit.

Again, the findings for MALD’s sites are very similar to those for the whole of Wales – see Figure 6 below.



Visitors to sites in North Wales were more likely to say they would not recommend Wales as a place to visit compared to visitors to the other sites across Wales (7% cf. 3% on average across MALD sites), although the proportion who said they would recommend Wales was still very high in North Wales.

## 4.5 MALD specific questions

### 4.5.1 Visitors perceptions of museums

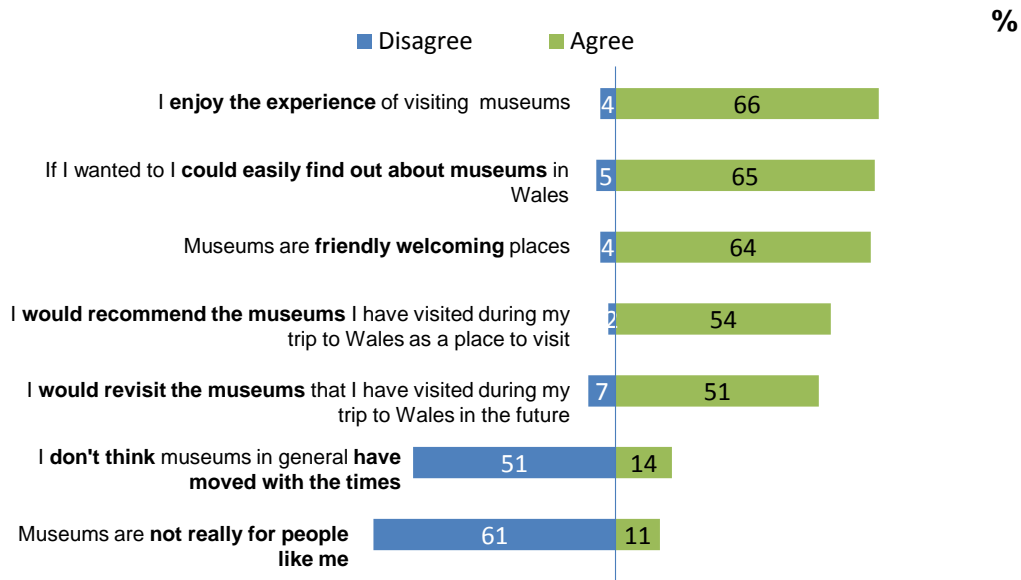
Visitors to the 10 sites across Wales that are of interest to MALD were asked whether they agreed or disagreed with seven statements about museums. Figure 7 shows the proportion agreeing (either strongly or slightly) or disagreeing (strongly or slightly) with the statements.

Two thirds of visitors to museums in Wales agreed that they 'enjoy the experience of visiting museums', while similar proportions also agreed that they could 'easily find out about museums in Wales' if they wanted to (65%) or that museums are 'friendly welcoming places' (64%). The proportion disagreeing with each of the three statements previously mentioned was very low (4%, 5% and 4% respectively).

Just over half of visitors to museums in Wales said they would either recommend the museums they had visited while in Wales or would revisit the museum/s they had visited during their trip to Wales (54% and 51% respectively). Again, the proportion disagreeing with the statements were very low (2% and 7% respectively).

One in six visitors (61%) also disagreed with the statement: 'museums are not really for people like me' but one in ten visitors (11%), however, did agree that museums were not for them. In addition, a sizable minority (14%) did not think that 'museums in general have moved with the times'. Nevertheless over half of visitors did disagree with this statement.

**Fig 7: Museums are friendly and welcoming places**



Bases = Stage 2 2016: MALD total (577); North Wales (224); Mid Wales (35); West Wales(126) South Wales (192). NB small base size. NB percentages may not add up to 100% due to rounding.

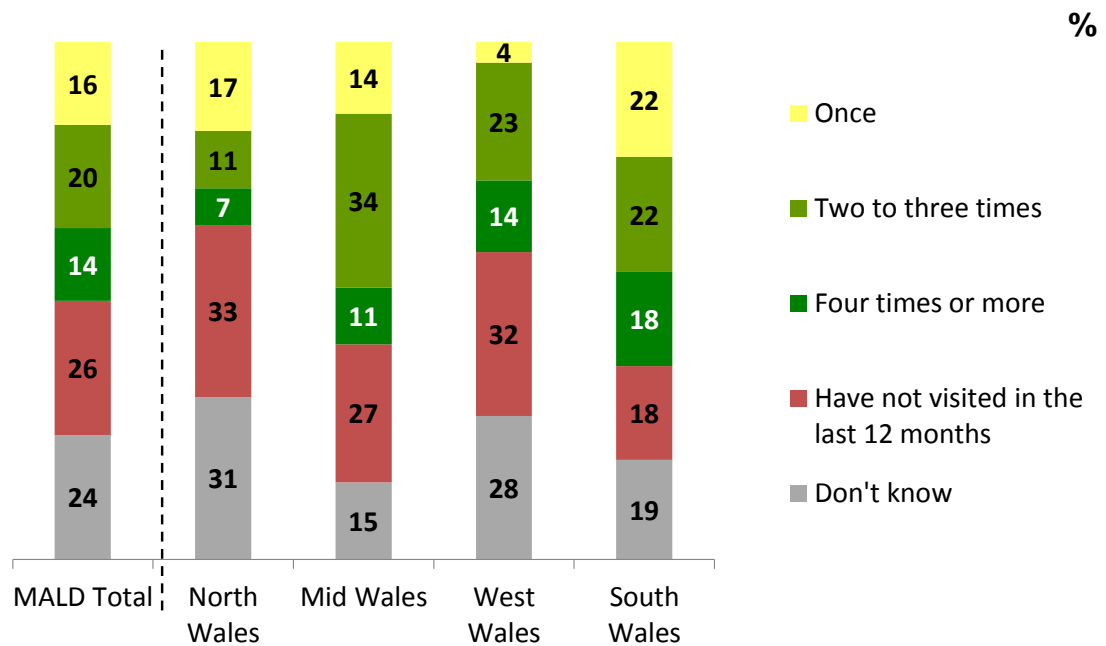
#### 4.5.2 Visiting museums in Wales during their visit and reasons for doing so

Visitors were asked how many times if at all they had visited a museum in Wales during the last 12 months.

Half of visitors to the MALD sites across Wales had visited a museum at least once in the last 12 months (50%); 16% had visited once, 20% had been two or three times and 14% had been four or more times. However, just over a quarter of visitors had not been to any museum during the last 12 months, while 24% said they couldn't remember / didn't know. Visitors to the locations in South Wales were more likely to have visited a museum at least once during the last 12 months (62%); with almost one in five saying they had visited a museum four or more times in the last 12 months (18%). This is probably higher in the South because of the higher concentration of museums, such as National Museum Cardiff and St Fagans.

Visitors to sites in North Wales were least likely to have visited a museum in the last 12 months as 35% said they had visited at least once. The proportion of visitors who said they had been more than once was also lower in North Wales (18% visiting two or more times cf. 34% on average across all MALD sites).

**Fig 8: How often, if at all, have visitors been to any museum in Wales during the last 12 months**



Bases = Stage 2 2016: MALD total (577); North Wales (224); Mid Wales (35); West Wales (126) South Wales (192). NB small base size. NB percentages may not add to up to 100% due to rounding.

Visitors who had visited museums in the last 12 months were asked why they had visited the museum. They were prompted with a list of reasons and asked to choose the reasons that best applied to them.

Over half of all visitors who had visited a museum in the last 12 months said they had visited to gain a deeper insight into a subject (53%). This was followed by the following reasons: they visited in order to experience awe-inspiring, fascinating or beautiful things or places (50%), to spend time with other people in nice places (41%), to find out about places they are visiting or staying in (39%) and to reflect and contemplate (28%).

Just under one in ten (8%) visitors who had visited a museum in Wales said they did not believe that any of the reasons listed applied to them - see Table 6 for more detail.

<b>Table 6: Reasons for visiting museum during trip to Wales (prompted)</b>	<b>Total %</b>	<b>North Wales %</b>	<b>Mid Wales %</b>	<b>West Wales %</b>	<b>South Wales %</b>
<b>To gain a deeper insight into a subject</b>	<b>53</b>	<b>54</b>	<b>37</b>	<b>47</b>	<b>57</b>
To experience awe-inspiring, fascinating or beautiful things or places	50	37	26	62	53
Spending time with other people in a nice place	41	37	22	32	47
To find out about places I'm visiting or staying in	39	43	22	29	43
To reflect and contemplate	28	18	19	35	30
Interested in history	1	1	-	-	2
To entertain the children	1	<1	-	5	-
Other	4	2	1	1	6
None of these	8	2	17	20	4
Don't know / can't remember	2	7	-	<1	2

Bases = Stage 2 2016: MALD total (283); North Wales (99); Mid Wales (16); West Wales (52) South Wales (116). **NB small base size**. NB percentages may not add to up to 100% due to rounding.

Visitors who did not visit any museums during their visit to Wales were also asked why they had not. Table 7 overleaf lists the main (prompted) reasons mentioned for not visiting a museum in Wales.

Almost half of visitors who had not visited a museum in Wales said it was because their trip was taken up with other activities (47%). A further 13% said they simply had not thought about visiting a museum, while 12% said they were not interested in any museums.

All other reasons were mentioned by less than 10% of the total number of MALD visitors who had not visited a museum in Wales during their trip. Therefore, very small numbers of visitors mentioned each of the following reasons: Did not know of any museums local to the trip location (9%), no museums nearby of interest (7%), disability / illness prevented them from going or they could not find enough information about museums (mentioned by 2% for each).



<b>Table 7: Reasons for <u>NOT</u> visiting musum during trip to Wales (prompted)</b>	<b>Total %</b>
<b>Base: Visitors who had <u>not</u> visited museums during their trip in Wales (148)</b>	
<b>Trip taken up with other activities / not enough time</b>	<b>47</b>
Didn't think about museums when planning trip	13
Not interested in any museums	12
Don't know any museums local to trip location	9
No museums nearby of interest to me	7
Disabilities / illness	2
Couldn't find enough information about museums	2
Other	2
None of these	11
Don't know / can't remember	5

## Appendix I: Detailed list of survey locations

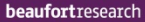
Table 12: Individual survey locations by region of Wales		
Region	Attraction	Partner buy-in organisation (if applicable)
North Wales	Anglesey Sea Zoo	
	Bala / Llyn Tegid	Snowdonia National Park
	Beaumaris Town Centre	
	Beddgelert	Snowdonia National Park
	Betws-y-Coed	
	Caernarfon Town Centre	
	Conwy Town Centre	
	Dolgellau	Snowdonia National Park
	Erddig	
	Holyhead Ferry Terminal / Station	Anglesey County Council
	Llanberis	
	Llandudno Promenade	
	Llangollen Town Centre	
	Pontcysyllte Aqueduct	
	Porthmadog Town Centre	
	Rhyl Promenade	
	Wepre Country Park	
Wrexham Town Centre		
Mid Wales	Aberaeron	
	Aberystwyth Promenade	
	Brecon Town Centre	
	Cardigan Town Centre	
	Devil's Bridge	
	Elan Valley Visitor Centre	
	Knighton / Presteigne	
	Lake Vyrnwy	Powys County Council
	Machynlleth	
	National Library of Wales	
	New Quay	
	Powis Castle	
Rhayader	Powys County Council	
Storey Arms		
Welshpool Town Centre		

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

Rhondda Heritage Park	
Royal Mint Experience	South East Wales Tourism Group
St Fagans National History Museum Tintern Abbey Tredegar House	

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

<b>WRITE IN YOUR INTERVIEWER NUMBER</b> →				(53)	(54)	(55)	(56)
<b>B01613</b>	<b>Accompanied</b>	Yes 1 No 2	<b>Supervisor signature:</b>	<b>QUOTA</b>		(57)	
				UK DAY			1
				UK STAYING			2
				OVERSEAS STAYING			3
				OVERSEAS DAY			4



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

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

**CASE NUMBER (FROM STAGE 1)**

**CONTACT NAME:**

**TELEPHONE NUMBER:**

**WELSH SPEAKER:**

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

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

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

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

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

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

English

Welsh

**SECTION 1 – VISITING WALES**

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

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

Once in three years

2 – 3 times

4 – 6 times

7 – 10 times

More than 10 times

Don't know / can't remember

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

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

Once in the last year

2 – 3 times

4 – 6 times

7 – 10 times

11 – 20 times

More than 20 times

Don't know / can't remember

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

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember → **Q7**

**ASK IF YES AT Q4**

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

\_\_\_\_\_

Don't know / can't remember

**ASK IF YES AT Q4**

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

## SECTION 2 – TRAVELLING IN AND AROUND WALES

### ASK IF OVERSEAS VISITOR (FROM SAMPLE)

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

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

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

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

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

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

Don't know / can't remember

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

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

### ASK ALL

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

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

### SECTION 3 – ACTIVITIES UNDERTAKEN

#### **ASK ALL**

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

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

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

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

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

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

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

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

To shop

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

To visit a spa or have a beauty or health treatment

For genealogy / to trace my ancestry

Other (**please specify**)

Don't know / can't remember

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

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

Walking (less than 2 miles)

Walking (more than 2 miles)

Cycling

Mountain biking

Fishing - sea

Fishing - course / game

Golf

Horse riding / pony trekking

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

Water sports

Canal / boating trip

Swimming (indoor or outdoor)

Field sports e.g. hunting / shooting

Other (**please specify**)

Don't know / can't remember

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

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

**READ OUT – CODE ALL MENTIONED**

Sporting event

Live concert

Theatre or cinema performance

Arts / cultural festival / Eisteddfod

Music festival

Food / drinks festival

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

Other (**please specify**)

Don't know / can't remember

**ASK IF CODE 3 AT Q11**

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

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

Don't know / can't remember

**ASK IF VISITED A BEACH AT Q15a**

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

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

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

Don't know

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

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

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

**GO TO Q17**

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

**GO TO SECTION 4**

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

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

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

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

**SECTION 4 – EATING OUT**

**ASK ALL**

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

Yes → **Q19**

No → **GO TO SECTION 5**

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

**ASK IF YES AT Q18**

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

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

**READ OUT**

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

## SECTION 5 – ACCOMMODATION

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

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

**READ OUT AS NECESSARY - SINGLE CODE**

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

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

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

**SINGLE CODE**

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

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



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

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

- Quality
- Service
- Value for money
- Overall satisfaction

**READ OUT**

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

Not applicable

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

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

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

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

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

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

Through a travel agent or tour operator

Through a tourist information centre

Just turned up → **SKIP Q24**

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

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

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

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

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

Book accommodation and travel separately with different providers

Book accommodation only – no travel booked

Don't know / can't remember

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

### **ASK ALL**

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

**ASK ALL**

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

**ASK IF WEBSITE CODED AT Q31**

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

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

Don't know / can't remember

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

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

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

Don't know / can't remember

**ASK ALL**

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

Yes  
No

Don't know / can't remember

**IF YES AT Q34**

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

1 - No influence at all

2

3

4

5

6

7

8

9

10 – Only reason I visited

Don't know / can't remember

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

**ASK ALL**

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

Very important

Quite important

Not very important

Not at all important

Don't know

**ASK ALL**

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

Strongly agree

Slightly agree

Slightly disagree

Strongly disagree

Don't know

**ASK ALL**

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

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

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

Any others (**please specify**)

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

**ASK ALL**

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

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

**INVERT SCALE BETWEEN RESPONDENTS**

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

Don't know

**SECTION 8 – SATISFACTION / OVERALL EXPERIENCE**

**ASK ALL**

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

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

**SINGLE CODE**

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

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

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

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

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Nothing  
Don't know

**ASK ALL**

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

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

Don't know

**ASK ALL**

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

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

Don't know

**ASK ALL**

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

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

Don't know

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

**ASK ALL**

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

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No other comments

**ASK ALL**

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

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

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

No

**Thanks very much for your time.**

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

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

**Thanks again and goodbye.**



## B01613-2 MALD ADDITIONAL QUESTIONS (FINAL)

**ASK QUESTIONS OF THE FOLLOWING POINT NUMBERS: 2, 5, 10, 14, 16, 20, 25, 33, 41, 47**

**Q1** I am now going to read out statements that some people have said about museums. To what extent do you agree or disagree with the following statements?

### **RANDOMISE ORDER OF STATEMENTS**

- Museums are friendly and welcoming places
- Museums are not really for people like me
- If I wanted to I could easily find out about museums in Wales
- I enjoy the experience of visiting museums
- I don't think museums in general have moved with the times
- I would revisit the museums that I have visited during my trip in Wales in the future
- I would recommend the museum/s I have visited during this trip in Wales as a place to visit to a friend or relative

### **READ OUT – INVERT SCALE BETWEEN RESPONDENTS**

Strongly disagree  
Slightly disagree  
Slightly agree  
Strongly agree

Don't know  
Not applicable

**Q2** How often, if at all, did you visit any museum during your recent trip in Wales (if live in Wales) / to Wales (if live outside Wales)?

1. Once
  2. Two to three times
  3. Four times or more
  4. Have not visited in the last 12 months → **Q4**
- } **Q3**

Don't know / can't remember → **END**

### **ASK IF CODED 1-3 AT Q2**

**Q3** Which of the following, if any, describe the reasons why you visited a museum during your recent trip in Wales (if live in Wales) / to Wales (if live outside Wales)?

### **READ OUT – CODE ALL MENTIONED**

To find out about places I'm visiting or staying in  
Spending time with other people in a nice place  
To experience awe-inspiring, fascinating or beautiful things or places  
To reflect and contemplate  
To gain a deeper insight into a subject  
Other (please specify)

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

**ASK IF CODED 4 AT Q2**

**Q4** Which of the following, if any, describe the reasons why you did not visit a museum during your recent trip in Wales (if live in Wales) / to Wales (if live outside Wales)?  
**READ OUT – CODE ALL MENTIONED**

Trip taken up with other activities

Couldn't find enough information about museums

Don't know of any museums local to trip location

Didn't think about museums when planning trip

No museums nearby of interest to me

Not interested in any museums

Other (please specify)

None of these

Don't know / can't remember

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