

Research Report

Wales Visitor Survey 2019

Museums, Archives and
Libraries Division



Prepared for:
Museums, Archives and Libraries
Division

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1. Executive summary

1.1 Introduction

This report focuses on **visitors to 12 tourism locations across Wales**. 1,622 interviews were conducted at Stage 1 and a further 811 were conducted at Stage 2 with visitors to sites of interest to MALD (see page 5).

This formed part of the 2019 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). **7,683** face-to-face interviews were conducted at Stage 1, and **3,909** 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 4 May and 22 November 2019.

1.2 Key findings

Visitor profile at Welsh museums:

Over one in ten visitors to Wales had visited a Welsh museum during their day trip or staying visit (11%).

Around a quarter of overseas visitors visited a Welsh museum during their trip (26%) compared to 15% of those from the rest of the UK and 10% of those from Wales. Reflecting this, staying visitors were more likely to visit museums compared to those on day trips in Wales (24% cf. 10%).

Those visitors from more affluent households were also more likely to visit museums during their visit in/to Wales (13% of ABC1 visitors), than those visitors from less affluent households who were slightly less likely to visit museums during their trip (8% of C2DE visitors). Interestingly, the proportions are equal for the different age categories and gender.

Regionally, those visiting South Wales were more likely to pay a visit to a museum during their trip than those visiting other regions in Wales (15%). However, those visiting North and Mid Wales were least likely to be visiting museums (9% and 8% respectively). It is possible that this is because there are more museums located in South Wales. For example, five out of seven of the National Museums are in this area.

Attitudes towards museums:

Visitors were asked the extent to which they agreed or disagreed with a series of statements about museums. Some statements have been transposed for ease of analysis. The proportion agreeing strongly with each was as follows:

- *If I wanted to, I could easily find out about museums in Wales* - 69%
- *Museums are for people like me* – 66%
- *I enjoy the experience of visiting museums* – 63%
- *Museums are friendly and welcoming places* – 57%
- *Museums have moved with the times* – 35%

Frequency of visiting Welsh museums, likelihood of revisiting and likelihood of recommending:

Over six in ten visitors to Wales had visited a museum at least once in the last year (63%). This was slightly lower amongst C2DE visitors and those over the age of 55. One in five visitors (21%) could be deemed frequent visitors as they had visited Welsh museums more than 4 times in the last 12 months (21%). This rose to a quarter of younger and middle-aged visitors (26% for each).

Over eight in ten of those who had visited a Welsh museum in the last 12 months agreed that they would revisit the museum during a future trip to Wales (85% agreed – 60% agreed strongly and 15% agreed slightly).

Equally high proportions of those who had visited a Welsh museum in the last 12 months also said they would recommend the museums they had visited during their trip to Wales (85% - 62% agreed strongly and 13% agreed slightly).

Motivations for visiting Welsh museums:

The most frequently mentioned reason for visiting a museum was to gain a deeper insight into the subject of the museum (63%). This rose to over seven in ten (71%) of those aged 16-34. The second most frequently mentioned reason was to experience awe-inspiring, fascinating or beautiful things or places mentioned by just under six in ten visitors (57%). Again, this was cited most frequently by younger visitors (67% cf. 56% of those aged 35-54 and 54% of those 55+). Over half of visitors also visited museums in order to spend time with other people in a nice place (55%). This was more important to female visitors (61% cf. 48% of men) and C2DE visitors (61% cf. 53% of ABC1 visitors).

Reasons for not visiting Welsh museums:

For almost two thirds of those who had not visited museums, lack of time was a factor as their trip had been taken up with other activities (65%). This was the reason mentioned by the highest proportion of visitors by far. Over one in five (22%) did not think about museums when they were planning their trip to or in Wales, while one in six visitors (17%) said they were not interested in museums - rising to 25% of C2DE visitors. A further one in ten said there were no museums

nearby of interest to them (11%) - a point raised by a higher proportion of visitors to both Mid and West Wales (19% for each). Finally, 10% said they did not know of any museums local to their trip, but this rose to 48% of those visiting Mid Wales.

2. Aims and objectives

Beaufort was commissioned by Visit Wales to conduct the 2019 Wales Visitor Survey, to update findings from the 2016 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 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 2019 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.

This summary report focuses on interviews conducted across Wales at the 12 sites of interest to MALD:

- **NORTH:** Beaumaris Town Centre, Llandudno Promenade, Llanberis, Llangollen town centre,
- **MID:** Aberystwyth Promenade, Brecon Town Centre,
- **WEST:** National Botanic Garden of Wales, Tenby Town Centre,
- **SOUTH:** Cardiff Castle, Chepstow Town Centre, Cwmcarn, Porthcawl

Details of all core Visit Wales and partner buy-in interviewing locations can be found in Appendix I.

3. Methodology

3.1 Overview of approach

Interviewing for the 2019 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). **1,622** interviews were conducted at Stage 1 across **12 locations** across Wales.

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 **811** telephone interviews were conducted with visitors to the sites of interest to MALD.

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 4 May and 22 November 2019.

3.2 Samples achieved at Stages 1 and 2 by region

Table 1: Regions	Stage 1 Interviews	Stage 2 Interviews
North	348	166
Mid	131	66
West	231	137
South	921	442
TOTAL	1,622	811

4. Research findings

4.1 Visitor profile for Welsh museums

Over one in ten visitors to Wales had visited a Welsh museum during their day trip or staying visit (11%). Table 2 overleaf details the profile of visitors to Welsh museums in 2019.

Around a quarter of overseas visitors visited a Welsh museum during their trip (26%) compared to 15% of those from the rest of the UK and 10% of those from Wales.

Reflecting the higher proportions of overseas visitors visiting museums, non-white visitors were more likely to visit museums (17% cf. 11% of white visitors).

Those visitors from more affluent households were also more likely to visit museums during their visit in/to Wales (13% of ABC1 visitors), than those visitors from less affluent households who were slightly less likely to visit museums during their trip (8% of C2DE visitors).

Interestingly, the proportions are equal for the different age categories and gender.

Staying visitors were more likely to visit museums compared to those on day trips in Wales (24% cf. 10%).

Regionally, those visiting South Wales were more likely to pay a visit to a museum during their trip than those visiting other regions in Wales (15%). However, those visiting North and Mid Wales were least likely to be visiting museums (9% and 8% respectively). It is possible that this is because there are more museums located in South Wales. For example, five out of seven of the National Museums are in this area - see Table 2 overleaf.

Table 2: Demographic profile of Museum visitors	%
Total	11
Area of residence	
Wales	10
Rest of the UK	15
Overseas	26
Gender	
Male	11
Female	12
Age	
16 - 34 years	12
35 – 54 years	11
55+ years	12
Social grade	
ABC1	13
C2DE	8
Ethnicity	
White	11
Non-white / other	17
Conditions or impairments	
Yes	14
No	11
Visitor type	
Day	10
Staying	24
Region of trip	
North	9
Mid	8
West	10
South	15

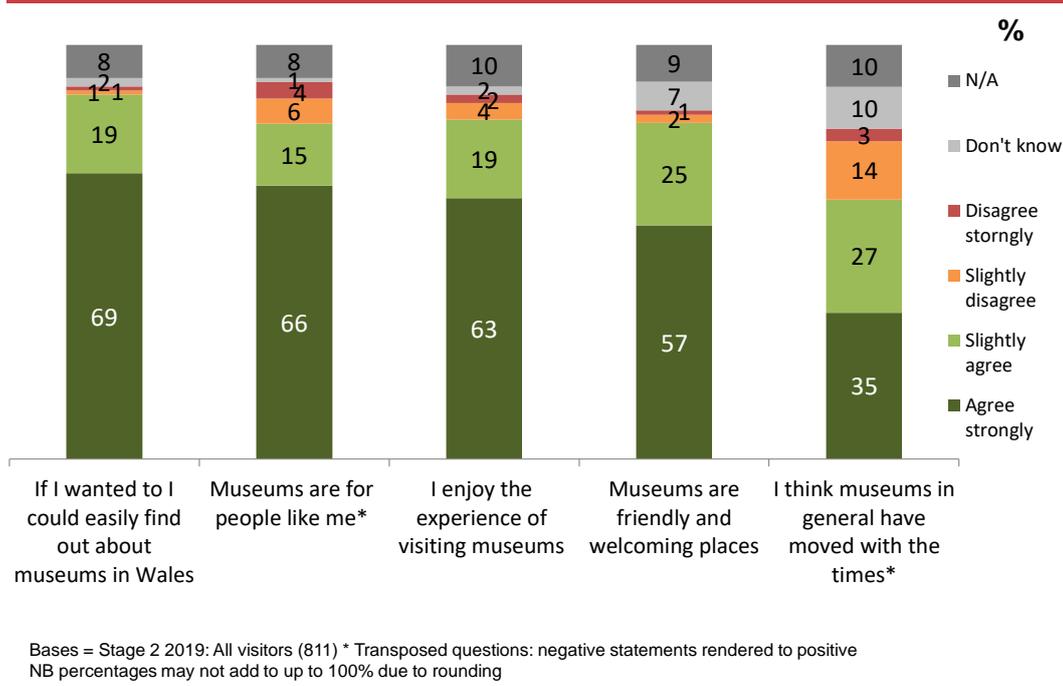
Bases = Stage 1 2019: all Wales (3,909).

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

4.2 Attitudes towards museums

Visitors across Wales were asked to what extent they agreed or disagreed with a series of statements about museums, the results of which are shown in Figure 1, overleaf. The results are positive overall (please note negative statements have been transposed for ease of analysis).

Fig 1: Attitudes towards museums



The attitudes are explored in more detail below:

If I wanted to, I could easily find out about museums in Wales

This statement was the most positively rated with almost nine in ten (88%) agreeing that they could easily find out about museums in Wales if they wanted to. Only 2% of visitors disagreed with this statement while a similar proportion said they did not know.

Museums are for people like me

This statement was transposed for ease of analysis. Just over eight in ten visitors (81%) believed that museums were for people like them, with two thirds strongly agreeing with this statement (66%). One in ten visitors did disagree with this statement with 4% disagreeing strongly that museums were for them. Groups that were most likely to disagree were:

- Overseas visitors (18% rated it *not for me*)
- C2DE visitors (16% rated it *not for me*)

I enjoy the experience of visiting museums

Over six in ten agreed strongly with this statement (63%). Moreover, almost all of the visitors who had visited a Welsh museum in the last 12 months agreed with this statement (95%) and it is worth noting that around seven in ten of visitors who had not visited a Welsh museum in the last 12 months also agreed with this statement (71%).

Museums are friendly and welcoming places

Over eight in ten agreed with the statement above (82%), with those most likely to rate museums friendly and welcoming in the following groups:

- First time visitors (90% rate them *friendly and welcoming* compared to 81% of repeat visitors)
- 16-34 age group (85% rate them *friendly and welcoming* compared to 80% of those aged 55+)

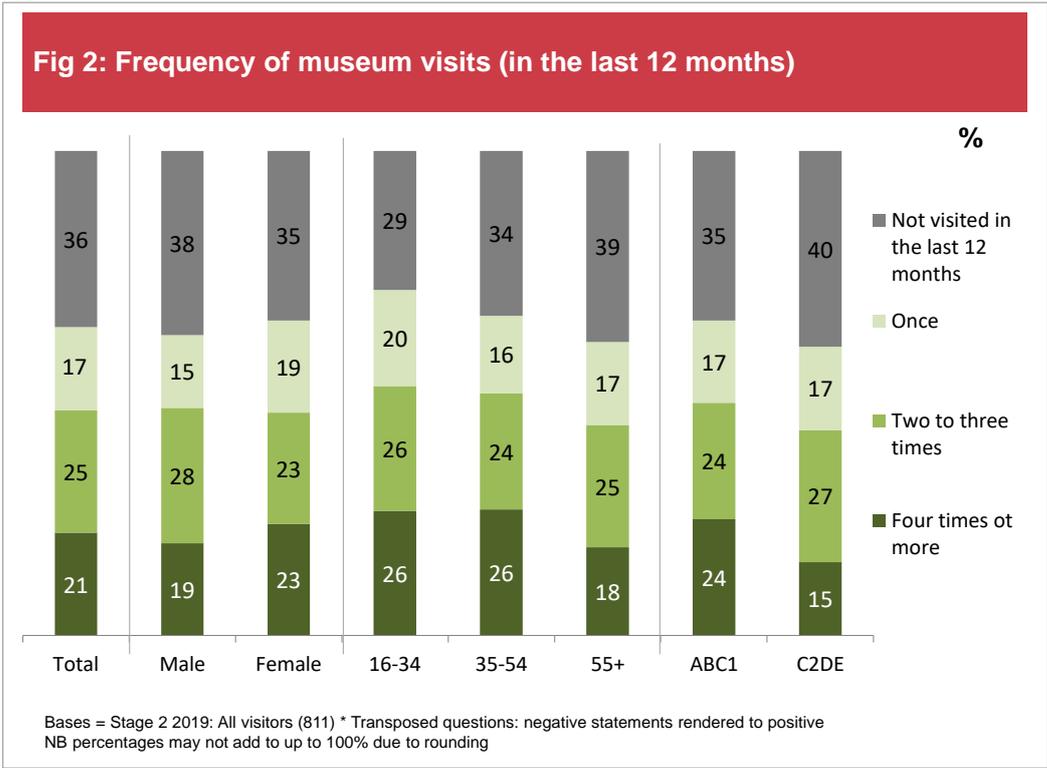
Museums have moved with the times

This statement was transposed for ease of analysis. Although it was the least positively rated statement, over six in ten agreed nevertheless that museums have moved with the times (62%). However, one in six (17%) did disagree with this statement. The group most likely to disagree with the statement comprised of younger visitors aged 16-34 as a quarter (25%) of these did not believe museums had moved with the times compared to 11% of those age 35-54 and 18% of those over 55.

4.3 Frequency of visiting Welsh museums

Over six in ten visitors to Wales had visited a museum at least once in the last year (63%). This was slightly lower amongst C2DE visitors and those over the age of 55 as 59% and 60% respectively had visited a Welsh museum at least once in the last year.

Younger and middle-aged visitors were most likely to be visiting Welsh museums most frequently as over a quarter had been to a Welsh museum four times or more in the last 12 months (26% for each). ABC1 visitors were also more likely to visit museums Wales more frequently as around a quarter had been four times or more (24%) – see Figure 2 for more details.



4.4 Revisiting and recommending Welsh museums

Over eight in ten of those who had visited a Welsh museum in the last 12 months agreed that they would revisit the museum during a future trip to Wales (85% agreed – 60% agreed strongly and 15% agreed slightly).

Equally high proportions of those who had visited a Welsh museum in the last 12 months also said they would recommend the museums they had visited during their trip to Wales (85% - 62% agreed strongly and 13% agreed slightly). Only 2% said they would not recommend the museum/s they had visited during their trip in Wales – see Figure 3 overleaf for more details.

Fig 3: Revisiting and recommending museums in Wales



4.5 Motivations for visiting Welsh museums

Visitors who had visited a museum in Wales during the last 12 months were asked what their reasons were for visiting. Table 4 overleaf lists the main reasons stated.

The most frequently mentioned reason for visiting a museum was to gain a deeper insight into the subject of the museum (63%). This rose to over seven in ten (71%) of those aged 16-34. The second most frequently mentioned reason was to experience awe-inspiring, fascinating or beautiful things or places mentioned by just under six in ten visitors (57%). Again, this was cited most frequently by younger visitors (67% cf. 56% of those aged 35-54 and 54% of those 55+). Over half of visitors also visited museums in order to spend time with other people in a nice place (55%). This was more important to female visitors (61% cf. 48% of men) and C2DE visitors (61% cf. 53% of ABC1 visitors).

Two fifths of visitors visited museums in order to find out more about the area they were visiting. Unsurprisingly, this was more important to visitors coming from outside Wales (55% of those from the rest of the UK and 50% of overseas visitors). This was also mentioned more frequently by those visitors visiting North Wales (59%).

A quarter of visitors also said visiting a museum gave them time to reflect and contemplate (26%) – see Table 3 overleaf for more details.

Table 3: Reasons for visiting a museum in Wales in the last 12 months (prompted)	%
To gain a deeper insight into a subject	63
To experience awe-inspiring, fascinating or beautiful things or places	57
Spending time with other people in a nice place	55
To find out about places I'm visiting or staying in	41
To reflect and contemplate	26
Nice day out with the children – fun and learning	5
Interested in history / subject of the museum	4
To see a temporary exhibition or event	2
Something to do when the weather is bad	2
Other	3

Bases = Stage 2 2019: All visitors who have visited a Welsh museum in the last 12 months (452) NB percentages do not add to up to 100% as more than one response possible.

4.6 Reasons for not visiting Welsh museums

Those who had not visited any museums in Wales during the last 12 months were asked for their reasons. Table 5 overleaf lists the main reasons given.

For almost two thirds of those who had not visited museums, lack of time was a factor as their trip had been taken up with other activities (65%). This was the reason mentioned by the highest proportion of visitors by far. Younger visitors and those visiting South Wales were most likely to state this as their reason for not visiting museums (79% and 69% respectively).

Over one in five (22%) did not think about museums when they were planning their trip to or in Wales. This was more likely to be mentioned by those visiting Mid Wales (40%).

One in six visitors (17%) said they were not interested in museums - rising to 25% of C2DE visitors. Over one in ten said there were no museums nearby of interest to them (11%) - a point raised by a higher proportion of visitors to both Mid and West Wales (19% for each). Finally, 10% said they did not know of any museums local to their trip, but this rose to 48% of those visiting Mid Wales.
– see Table 4 overleaf for more details.

Table 4: Reasons for <u>not</u> visiting a museum in Wales during the last 12 months (prompted)	%
Trip taken up with other activities	65
Didn't think about museums when planning trip	22
Not interested in any museums	17
No museums nearby of interest to me	11
Don't know of any museums local to trip location	10
Couldn't find enough information about museums	3
Lack of mobility / health reasons	3
Prefer being outdoors	2
Can't get there / don't drive	2
Other	5

Bases = Stage 2 2019: All visitors who have not visited a Welsh museum in the last 12 months (297) NB percentages do not add to up to 100% as more than one response possible.

Appendix I: Detailed list of survey locations

Table 6: Individual survey locations by region of Wales

Region	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		
Mid Wales	Zip World (Blaenau Ffestiniog)	
	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	

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 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 National Museum Cardiff Penarth Pier Porthcawl Promenade Rhondda Heritage Park Rock UK Summit Centre Royal Mint Experience St Fagans National History Museum Tintern Abbey Tredegar House Wales Millennium Centre / Bay	Monmouthshire County Council Rhondda Cynon Taf County Borough Council Natural Resources Wales Bridgend Council Monmouthshire County Council Vale of Glamorgan Council

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

 2 Museum Place, Cardiff CF10 3BG	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
	VISITOR SURVEY 2019		(CODED VIA SNAP)		
	STAGE 1 (FINAL)	(CODED VIA SNAP)			

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

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

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

SHOWCARD D

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, diabetes)..... 8
- 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 (print or online)..... 5
- Saw an advert, flyer or supplement in a newspaper / magazine..... 6
- Outdoor advertisement (e.g. posters, bus sides, airports, stations)..... 7
- Online ad (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 website (e.g. TripAdvisor)..... B
- Word of mouth / conversation with others in person..... C
- Direct mail / flyer..... D
- Email newsletter..... E
- Other..... F
- None of these G

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

REMINDE CONTACT DETAILS WILL ONLY BE USED FOR PURPOSES OF RESEARCH

Name: _____

Preferred telephone number: _____ Back-up telephone number _____

IF USA – RECORD STATE THEY LIVE IN: _____

Appendix III: Stage 2 survey questionnaire (telephone interviews)

B01919-2
2019 Visit Wales Visitor Survey Stage 2
Telephone Survey Questionnaire (FINAL)

CASE NUMBER (FROM STAGE 1)

CONTACT NAME:

TELEPHONE NUMBER:

WELSH SPEAKER:

SITE NAME (FOR QUESTION WORDING):

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

COUNTRY OF RESIDENCE (FOR QUESTION WORDING):

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

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

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

English

Welsh

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

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

Yes – IF YES, CONTINUE

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

SECTION 1 – VISITING WALES

ASK IF STAYING VISITOR

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

Once in three years

2 – 3 times

4 – 6 times

7 – 10 times

More than 10 times

Don't know / can't remember

ASK IF DAY VISITOR

Q2 How many times in the last year have you taken a day trip in/to Wales, including the recent trip when we interviewed you? **READ OUT AS NECESSARY**

- Once in the last year
- 2 – 3 times
- 4 – 6 times
- 7 – 10 times
- 11 – 20 times
- More than 20 times

Don't know / can't remember

ASK IF STAYING VISITOR

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

- Main holiday of the year
- Secondary / additional holiday
- Short break
- Other

Don't know / can't remember

ASK IF STAYING VISITOR

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

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

Don't know / can't remember

ASK IF STAYING VISITOR

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

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

Don't know / can't remember

SECTION 2 – TRAVELLING IN AND AROUND WALES

ASK IF OVERSEAS VISITOR

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

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

Don't know / can't remember

ASK IF DAY OR STAYING VISITOR FROM OUTSIDE WALES

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

ASK ALL

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

	Q7	Q8
	Column A	Column B
	(Single)	(Multi)
Private car or van		
Hired car or van		
Train		
Public bus or coach		
Private bus/coach excursion/tour		
Bike		
Motorbike		
On foot		
Taxi		
Water taxi or bus		
Boat or yacht		
Campervan or tourer		
Ferry – car passenger		
Ferry – foot passenger		
Plane (specify arrival airport)		

Other (please specify how and where arrived)		

Don't know / can't remember		

SECTION 3 – ACTIVITIES UNDERTAKEN & MOTIVATIONS FOR VISITING**ASK ALL**

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

IF MORE THAN ONE CODED AT Q9 ASK Q10

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

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

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

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

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

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

To shop

To visit friends or relatives

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

To visit a spa or have a beauty or health treatment

For genealogy / to trace my ancestry

Other (**please specify**)

Don't know / can't remember

ASK IF CODE 1 AT Q9

Q11 Which of the following did you take part in during your trip? **PROBE** Any other outdoor or sporting activities or events? **READ OUT – CODE ALL MENTIONED**

Walking (less than 2 miles)
Walking (more than 2 miles)
Cycling
Mountain biking
Fishing - sea
Fishing - course / game
Golf
Horse riding / pony trekking
Adventure sports, e.g. canoeing, rafting, climbing or mountaineering
Water sports
Canal / boating trip
Swimming (indoor or outdoor)
Field sports e.g. hunting / shooting
A sporting event or race, e.g. half-marathon, cycling event, triathlon
Other (**please specify**)
Don't know / can't remember

ASK IF CODE 2 AT Q9

Q12 Which of the following did you attend during your trip? **PROBE** Any other events, concerts or sporting events? **READ OUT – CODE ALL MENTIONED**

Sporting event
Live concert
Theatre or cinema performance
Arts / cultural festival / Eisteddfod
Music festival
Food / drinks festival
Activity event e.g. walking festival, cycle race, charity run
Other (**please specify**)

Don't know / can't remember

ASK IF CODE 3 AT Q9

Q13a Which of the following did you do during your trip? **PROBE** Any other ways of enjoying the landscape / countryside / beaches? **READ OUT – CODE ALL MENTIONED**

Visit the beach - **ASK Q13b**
Visit country parks / forest parks
Visit a wildlife attraction / nature reserve
Visit gardens
Guided walk
Wildlife watching
Other (**please specify**)
Don't know / can't remember

ASK IF VISITED A BEACH AT Q13a

Q13b Certain beaches in Wales have received awards for quality and cleanliness, such as the Blue Flag Award, Green Coast Award and Seaside Award. How important are these awards to you when choosing a beach to visit? **READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS**

Very important
Fairly important
Not very important
Not at all important
Don't know

ASK IF CODE 4 OR 5 AT Q9

Q14 Which of the following did you visit during your trip? **PROBE** Any other places, historical sites, religious sites or attractions? **READ OUT – CODE ALL MENTIONED**

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

GO TO Q15

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

GO TO Q16

ASK IF CODE 1-10 AT Q14

Q15 Thinking about the attractions you visited during your trip in Wales, how satisfied were you with the following aspects? Please use a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied. **READ OUT – RANDOMISE ORDER OF STATEMENTS**

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

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

ASK ALL

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

To help you relax and escape from the stresses of life

It is easy to get to

Holidayed before and wanted to return

Have always wanted to visit

To visit a particular attraction / place

My Welsh ancestry

Other (**please specify**)

None of these

Don't know

ASK IF STAYING VISITOR

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

Recommended by friends / relatives / colleagues

Wanted to holiday at home rather than abroad

Found a good deal / special offer

Traveller review websites

Price of hotels / accommodation

Saw something on social media about Wales

Price of airline tickets

Direct advice from travel agent / tour operator

Good exchange rates

Other (**please specify**)

None of these

Don't know

SECTION 4 – EATING OUT

ASK ALL

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

Yes → **Q19**

No → **GO TO SECTION 5**

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

ASK IF YES AT Q18

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

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

READ OUT

1 – Very dissatisfied

2

3

4

5

6

7

8

9

10 – Very satisfied

Don't know / can't remember

SECTION 5 – ACCOMMODATION

ASK IF STAYING VISITORS

Q20 During your stay in Wales, what type of accommodation did you mainly use?
READ OUT AS NECESSARY - SINGLE CODE

Hotel

B&B or Guesthouse

Farmhouse

Caravan (touring / campervan / motorhome)

In rented static caravan

In own static caravan

Camping

Self-Catering in rented house, villa, cottage, apartment or flat

Serviced apartment

Friend's / relative's home

Someone else's home on a commercial basis

Own second home / time share

Holiday camp/village

Hostel

Alternative accommodation, e.g. Yurt, Tee-Pee, Tree House, Hut, Ecopod etc.

Boat

Cruise ship

University accommodation

Other (**please specify**)

Don't know / can't remember

ASK IF STAYING VISITOR

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

SINGLE CODE

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

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

ASK IF STAYING VISITOR AND STAYED IN COMMERCIAL ACCOMMODATION

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

- Quality
- Service
- Value for money
- Overall satisfaction

READ OUT

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

Don't know / can't remember

Not applicable

ASK IF STAYING VISITOR AND STAYED IN COMMERCIAL ACCOMMODATION

Q23 How did you book your accommodation or package?

DO NOT PROMPT – SINGLE CODE

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

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

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

Through a link on the VisitWales.com website

Through a travel agent or tour operator

Through a tourist information centre

Through Airbnb

Just turned up → **SKIP Q24**

Other (please specify) → **SKIP Q24**

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

ASK IF STAYING VISITOR AND BOOKED IN ADVANCE

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

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

Don't know / can't remember

ASK IF STAYING VISITOR AND STAYING IN COMMERCIAL ACCOMMODATION

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

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

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

SECTION 6 – SOURCES OF INFORMATION AND MARKETING

ASK ALL

Q26 In planning and gathering information for your recent trip in/to Wales, did you use online information sources, offline, or both? By offline, we mean sources of information not found on the internet. **READ OUT – SINGLE CODE**

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

Don't know / can't remember

ASK IF USED ONLINE SOURCES (1 OR 3 AT Q26)

Q27 Did you use..? **READ OUT – CODE ALL MENTIONED**

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

Don't know / can't remember

ASK IF WEBSITE CODED AT Q27

Q28 Can you remember which types of website you or your party used to plan your trip before you went? **DO NOT PROMPT – CODE ALL MENTIONED**

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

Don't know / can't remember

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

Q29 What offline sources of information did you or your party use before you went? **DO NOT PROMPT – CODE ALL MENTIONED**

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

Don't know / can't remember

ASK ALL

Q30 Thinking now about information sources used during your trip in/to Wales, which one of the following best describes what you or your party used? **READ OUT - SINGLE CODE**

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

Don't know / can't remember

ASK IF CODED 1 OR 3 AT Q30

Q31 Can you remember which types of website or app you or your party used during your trip?
DO NOT PROMPT – CODE ALL MENTIONED

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

Don't know / can't remember

ASK IF CODED 2 OR 3 AT Q30

Q32 What offline sources of information did you or your party use during your trip?
DO NOT PROMPT – CODE ALL MENTIONED

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

Don't know / can't remember

ASK ALL

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

Yes
No

Don't know / can't remember

IF YES AT Q33

Q34 To what extent did the 'Year of Discovery 2019' influence your decision to visit Wales?
Please give me a number between 1 and 10 where 1 = 'It had no influence at all' and 10 = 'It was the only reason I visited Wales'. **SINGLE CODE**

1 - No influence at all
2
3
4
5
6
7
8

9

10 – Only reason I visited

Don't know / can't remember

SECTION 7 – SUSTAINABILITY, SENSE OF PLACE AND OTHER ISSUES

ASK ALL

Q35 To what extent do you agree or disagree with the statement “Wales represents a sustainable tourism destination for holidays and breaks”?

READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

Strongly agree
Slightly agree
Slightly disagree
Strongly disagree

Don't know

ASK ALL

Q36 Thinking about your recent visit in/to Wales, did any of the following include aspects or features that were distinctively Welsh, or had a particular local character?

READ OUT – CODE ALL MENTIONED – RANDOMISE LIST

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

Any others **(please specify)**

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

ASK ALL

Q37 And how important, or not, is it to you that..? **READ OUT IN TURN – RANDOMISE ORDER**

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

INVERT SCALE BETWEEN RESPONDENTS

Very important
Quite important
Not very important
Not at all important

Don't know

SECTION 8 – SATISFACTION / OVERALL EXPERIENCE

ASK ALL

Q38 How satisfied were you with the following aspects of your trip to/in Wales on a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied? *Instruction: code 'not applicable' if any don't apply.* **READ OUT – RANDOMISE ORDER**

- | | |
|---|--|
| 1. Overall value for money | disability / long-term illness |
| 2. Places to visit in Wales | 13. How pet-friendly you found it to be |
| 3. Quality of the natural environment | 14. Quality and availability of public transport |
| 4. Shopping | 15. Digital connectivity, e.g. mobile phone signal, availability of wifi |
| 5. Feeling of welcome | 16. Helping you relax and escape from the stresses of life |
| 6. Cleanliness of streets | 17. Wales overall as a place to visit → |
| 7. Feeling of security | ALWAYS COMES AT THE END OF THE LIST |
| 8. Cleanliness and availability of public toilets | |
| 9. Standard of tourist signposting | |
| 10. Cleanliness of beaches | |
| 11. Sea water quality | |
| 12. Accessibility for people with a | |

SINGLE CODE

- | | |
|-----------------------|---------------------|
| 1 – Very dissatisfied | 7 |
| 2 | 8 |
| 3 | 9 |
| 4 | 10 – Very satisfied |
| 5 | |
| 6 | Not applicable |
| | Don't know |

ASK IF CODED 1-7 FOR STATEMENT 17 – 'WALES OVERALL AS A PLACE TO VISIT'

Q39 Why did you give a score of [SCORE GIVEN] when asked about your overall experience during your recent trip? What would have improved your experience or encouraged you to give Wales a higher score apart from the weather? **PROBE** – Anything else?

RECORD VERBATIM

- Nothing
Don't know

ASK ALL

Q40 Overall, would you say your trip to/in Wales was....?

READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

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

Don't know

ASK ALL

Q41 How likely are you to make another visit in / to Wales in the next few years?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

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

Don't know

ASK IF STAYING VISITOR

Q42 How likely are you to come to Wales for a day trip in the next few years?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

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

Don't know

ASK IF DAY VISITOR

Q43 How likely are you to come to Wales for a leisure break or holiday in the next few years?
READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

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

Don't know

ASK ALL

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

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

Don't know

ASK IF OVERSEAS VISITOR

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

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

ANY PARTNER-SPECIFIC QUESTION TO BE ADDED HERE

ASK ALL

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

No other comments

ASK ALL

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

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

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

No

Thanks very much for your time.

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

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

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

Thanks again and goodbye.

B01919 MALD ADDITIONAL QUESTIONS (FINAL)

ASK QUESTIONS OF THE FOLLOWING POINT NUMBERS: 2, 6, 10, 15, 18, 22, 27, 28, 29, 32, 39, 51

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, have you visited any museum in Wales during the last 12 months?

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 in Wales during the last 12 months?

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 in Wales during the last 12 months?

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
www.beaufortresearch.co.uk