

Pembrokeshire Visitor Survey Research 2007/08

Executive Summary



This executive summary presents the overall findings for the 2007/2008 Pembrokeshire Visitor Survey research carried out by QA Research on behalf of Pembrokeshire County Council (PCC), South West Wales Tourism Partnership (SWWTP) and Pembrokeshire Coast National Park Authority (PCNPA). The Pembrokeshire visitor research project included three methodological stages: a face to face visitor survey, an online enquirer survey and MOSAIC geo-demographic profiling report.

The key findings below are based on 1,526 quantitative face to face surveys completed with visitors to Pembrokeshire between July 2007 and June 2008. The online surveys looked to collect research on potential and current visitors from the main visitor websites. A total of 464 online respondents completed the survey from August 2007 to June 2008. In total just under two thirds of online respondents were previous visitors (63%) and a third non-visitors (37%).

The MOSAIC geo-demographic customer profiling analysis was carried out on 1,411 Pembrokeshire visitor UK postcode records. This system operates by processing UK postcodes and then matching them to geographical areas within the country and against Government Census data. Visitors' postcodes were then placed into 61 classifications to determine key attributes such as income, family stage, newspaper readership, Internet usage and also behaviours such as hobbies, interests and direct mail responsiveness.

PROFILE OF VISITORS	
Visitor Type	<p>74% were staying visitors and 26% were day visitors. 60% of visitors were staying in overnight accommodation within Pembrokeshire, 9% stayed with friends and relatives.</p> <p>Visitors were more likely to be staying in overnight accommodation during Summer (68%) and Spring (57%).</p> <p>The proportion of day visitors was higher during Autumn (39%) and Winter (37%).</p>
Previous Visits	<p>55% of respondents had visited Pembrokeshire in the past 12 months. The number of regular repeat visitors was higher during Autumn (67%) and Winter (65%).</p> <p>17% of visitors had never visited Pembrokeshire before. There were a higher proportion of first-time visitors during Summer (20%), compared to Winter (9%).</p> <p>62% of all past visitors were regular visitors. Of these, 19% visited each month/each week, 22% visited three to four times a year and 21% visited about once a year.</p> <p><u>Online respondents</u></p> <ul style="list-style-type: none"> • 63% were previous visitors and 37% non-visitors • 58% stayed overnight, and 33% visited on a day trip • 59% of all past visitors were regular visitors (10% visiting each month/each week, 23% three to four times a year and 26% about once a year).
Gender	<p>53% of respondents were female and 47% male; these figures were fairly consistent throughout the year.</p>
Age	<p>A broad range of age groups were attracted to Pembrokeshire. 35% were aged 35 to 54 years, 27% were aged 15 years and under and 27% aged 55 years plus.</p> <p>13% of visitors were aged 16 to 34 years. Comparisons with the 2004 results show that the proportion of visitors aged 24 to 34 years increased from 14% in 2004 to 20% in 2008.</p> <p><u>Online respondents</u> belong to slightly older age groups; 62% were aged 45 years and</p>

	over, 33% were aged 25 to 44 years old.
Party Size	<p>The average party size was slightly smaller at 2.97 people (2.17 adults, 0.80 children) in 2008 compared to 3.33 people (2.72 adults, 0.61 children) in 2004, although there was an increase in the average number of children per party.</p> <p>61% of all visitors were without children and 39% visited with children.</p> <p>The highest proportion of parties with children occurred in Summer (45%), followed by Autumn (36%), Spring (30%) and Winter (28%).</p> <p><u>Online respondents</u>: 25% had children, compared to 39% of face to face visitors.</p>
Dogs on Holiday	<p>13% of all visitors brought a dog with them. This rose to 18% during Autumn.</p> <p>14% of visitors in overnight accommodation had brought a dog with them, compared to only 7% of day visitors.</p> <p><u>Online visitors</u>: 28% brought a dog with them on holiday.</p>
Origin of Visitors	<p>43% of visitors to Pembrokeshire were from Wales, compared to 34% in 2008. The highest proportion of visitors from Wales occurred in Autumn (76%) and Winter (67%).</p> <p>A high proportion of visitors were from the West Midlands (14%), the South East and London (12%) and the South West (9%).</p> <p><u>Online respondents</u> showed a wider regional spread; 21% Wales, 18% South West, 15% South East and 11% West Midlands.</p> <p><u>MOSAIC analysis</u> shows that Pembrokeshire attracts above average levels of Welsh (986.01) and West Midlands (132.39) visitors to the area.</p>
Social Grade	<p>63% of visitors were in grades A/B/C1, compared to 68% in 2004. UK average is 54%.</p> <p>17% were in grades D/E, compared to 8% in 2004. UK average is 25%.</p> <p><u>Online respondents</u>: 76% were from grades A/B/C1.</p>
MOSAIC Geo-demographic Profiling Research	<p>Pembrokeshire attracts a high proportion of visitors from the following market segments; Upland Hill Farmers (K61), Summer Playgrounds (K57), Pastoral Symphony (K60) and Affluent Blue Collar (D22) groups. All groups belong to 45 to 64 year age groups.</p> <p>The K groups tend to enjoy outdoor activities, be in couples, have no dependant children and read the Daily Telegraph, the Guardian and the Independent.</p> <p>The D22 group tend to enjoy more packaged holiday activities, plus camping and caravanning accommodation. They are in couples and have dependant children, and tend to read newspapers such as the Daily Mail and The Mirror.</p>
PATTERN OF STAYING VISITORS	
Length of Stay	<p>The average number of nights stayed overnight in Pembrokeshire was 6.80 nights.</p> <p>62% stayed on a long break (5 nights or more) and 38% stayed on a short break (4 nights or less)</p> <p>Visitors in the Summer stayed for significantly longer periods (8.43 nights), and nearly double the length compared to other quarters. Shorter breaks were more popular during Autumn (66%), Winter (56%) and Spring (53%) compared to the Summer (24%).</p> <p>Results remained fairly level with 2004; 29% of visitors took 1 to 3 night breaks in 2008, compared to 30% in 2004.</p>

Location of Accommodation	<p>The ten most popular towns stayed in were Tenby (19%), St Davids (11%), Newport (8%), Saundersfoot (7%), Fishguard (6%), Newgale (4%), Pembroke (3%), Narberth (3%), Manorbier (3%) and Haverfordwest (3%).</p> <p><u>Online visitors:</u> the most popular towns for recent (last 12 months) visitors were St Davids (31%), Tenby (15%) and Saundersfoot (12%).</p>
Type of Accommodation	<p>64% of visitors stayed in Paid Accommodation and 36% stayed in Free Accommodation.</p> <p>The most popular types of Paid Accommodation were self-catering (21%), hotel/motel/lodge (14%) and camping (11%).</p> <p>Results for 2008 and 2004 are not directly comparable, however 2008 results indicate decreases in Self-Catering (28% in 2004 to 21% in 2008) and Guest Houses/B&Bs (12% in 2004 to 7% in 2008). Overall, the proportion of people staying in Paid and Free accommodation remained fairly level.</p>
Time of Booking Accommodation	<p>24% of visitors booked between 3 to 6 months in advance; 17% booked within 2 weeks of arrival.</p> <p>A significantly higher proportion of Autumn (65%) and Winter (79%) visitors booked 3 months or less in advance compared to Summer (53%) and Spring (54%).</p> <p>When comparing 2008 results with 2004, 43% booked their accommodation 3 months or more in advance, compared to 36% of visitors in 2004. However, another 30% booked within 2 weeks of arrival, compared to 28% in 2004.</p>
Rating of Accommodation	<p>Overall ratings for Location (4.63 mean), Cleanliness (4.55 mean), Customer Service (4.46 mean), Quality of Décor & Facilities (4.43 mean) and Value for Money (4.46 mean) were rated between "Good" and "Very Good". Results show similar patterns to 2004.</p>
MODE OF TRANSPORT	
Mode of Transport to Pembrokeshire	<p>The main mode of transport for 90% of visitors was a motorised vehicle (car, motorbike and motor-home). 6% used public transport in the form of buses, coaches and trains. These are very similar results compared to 2004.</p>
EXPENDITURE	
Expenditure	<p>The total spend per day (excluding accommodation) was £25.23 per person and £60.06 per day per party.</p> <p>For accommodation, the average spend per party per night was £53.62 and per person per night was £21.39.</p> <p>Total spend was lower in the Summer compared to other quarters, possibly explained by the warmer weather, meaning that visitors could participate in more 'free' outdoor activities such as walking or cycling.</p>
ACTIVITY UNDERTAKEN	
Activities Undertaken	<p>On average visitors took part in 5 activities during their stay. The most popular activities included Short Walks (65%), Eating & Drinking out (63%), Visiting Natural Attractions (61%), Shopping (55%) and Driving around/sightseeing from the car (43%).</p> <p>A wider range of activities were participated in during Summer and Spring compared to Winter and Autumn. Visiting Theme/Activity Parks in Winter (36%) and Autumn (34%) and Visiting Friends & Relatives in Winter (26%) were the only activities that had higher ratings compared to Summer and Spring.</p> <p>Comparing the 2008 results with 2004, there were significant increases in Walking (up 18%), Wildlife and Bird Watching (up 18%), Water Sports (up 6%) and Theme/Activity parks (up 12%). There was a 17% decrease in visits to Castles and Heritage sites.</p>

Main Activity Undertaken	<p>When asked to identify their main activity, 20% said visiting a Natural Attraction (e.g. coastline, countryside, island, nature reserve), 8% Passive Beach Activities, 8% Visiting Friends or Relatives, and 8% Short Walks.</p> <p><u>Online respondents:</u> The most popular activities were Long Walk (33%), visiting Natural Attractions (17%), Short Walk (8%) and visiting Historic/Heritage/Cultural sites (7%).</p>
Usage of Coastal Path	58% of walking visitors had used or were going to use The Coastal Path.
Towns/Areas Visited	<p>49% of respondents visited Tenby, followed by St. Davids (38%), Haverfordwest (27%), Fishguard (24%), Saundersfoot (23%), Pembroke (22%), Newport (17%), Narberth (14%), Newgale (14%) and Milford Haven (12%).</p> <p>Winter visitors visited fewer places than visitors in other quarters, possibly because of the higher proportion of day visitors and the poorer weather during this period.</p> <p>For online visitors, the most frequently visited destination was St Davids (63%), followed by Haverfordwest (61%), Tenby (48%), Pembroke (43%), Fishguard (43%) and Newgale (42%).</p>
MOTIVATIONS FOR VISITING	
Source of Information	<p>The most popular source of information that influenced the decision to visit was Previous Experience (61%), followed by Website/Internet Search (14%), Recommendation/Word of Mouth (11%), Pembrokeshire Holiday Guide (4%) and Visit Wales brochure (2%). Comparing with the 2004 survey, the figures remained fairly level.</p> <p>A higher proportion of those staying overnight in Pembrokeshire (18%) and first-time visitors (35%) sourced the internet compared to day visitors (3%) and repeat visitors (9%).</p>
Reasons for Choosing to Visit	<p>The most common reason cited for visiting was Previous Visit (61%), followed by Scenery & Landscape (46%), the Atmospheric Characteristics (31%) and Award-winning Beaches (25%).</p> <p>When asked to identify their main reason for visiting, 22% said Previous Visit, followed by Scenery & Landscape (15%) and to Visit Family, Friends or Second Home (13%).</p> <p>19% visited in Summer because of the Scenery & Landscape, compared to Autumn (6%) and Winter (10%). A higher proportion of Autumn (17%) and Winter (18%) visitors visited because of a Specific Place/Attraction/Island, compared to Summer (3%) and Spring (2%) visitors.</p> <p><u>Online visitors'</u> top four answers reflect an appreciation of the Natural Landscape / Scenery & Landscape (32%), To Walk the Coastal Path (10%), To visit Pembrokeshire Coast National Park (9%) and because of the Atmospheric Characteristics (9%).</p>
EXPERIENCE OF TRIP	
Importance/ Performance Analysis	<p>The factors that scored highest in terms of importance to any holiday were Award Winning Beaches (4.40), a range of Natural Attractions to visit (4.25) and Opportunities for Walking (4.21).</p> <p>The highest performance scores for Pembrokeshire were Award Winning Beaches (4.80 mean), Opportunities for Walking (4.75 mean) and a range of Natural Attractions to visit (4.67 mean).</p> <p>Lower rating performance scores ("Satisfactory to Good") were given to Facilities Open all Year round (3.94 mean), Environmentally-friendly services and facilities (3.92 mean), High Quality Gardens and Garden Centres (3.52 mean) and Lively Nightlife (2.36 mean).</p>

	<p>Gap analysis shows that Facilities Open all Year round (0.25) and Excellent Eating Out experiences (0.07) were underperforming. There were negative scores for Open All Year Round in Winter (-0.09) and Spring (-0.20), while Eating Out received a negative score in Spring (-0.41).</p> <p>Gap Analysis for <u>Online respondents</u> again shows that Facilities Open All Year Round (0.03) and Eating Out Experiences (0.06) received the least positive ratings.</p>
Rating of Services and Facilities	<p>The highest rated services/facilities were the Cleanliness of Beaches (4.44), General level of Litter and Cleanliness (4.28) and Tourist Information Centres (4.17).</p> <p>Possible areas for improvement included Car Parking (3.96), Cleanliness of Public Toilets (3.92), Availability of Public Toilets (3.92) and Public Transport (3.60). Public transport was rated consistently lower throughout the year and rated "Poor to Satisfactory" in the Autumn (2.44).</p>
Satisfaction comparison with other UK Destinations	<p>Pembrokeshire achieved high satisfaction scores ("Good" to "Very Good") compared to other UK destinations; Overall Experience (4.72), Warmth of Welcome and Friendliness (4.65) and Value for Money (4.39).</p> <p>Warmth of Welcome scored significantly higher in 2008 (92%) than 2004 (79%). Value for Money remained fairly level; 84% in 2008 and 83% in 2004.</p> <p><u>Online visitors</u> also recorded high satisfaction scores: Overall Experience (4.61), Warmth of Welcome and Friendliness (4.43) and Value for Money (4.20).</p>
Aspects Most Enjoyed	<p>23% of respondents most enjoyed the Physical Scenery, 18% enjoyed the county's Atmospheric Characteristics and 15% Beaches.</p> <p><u>Online visitors</u>: 36% most enjoyed the Physical Scenery, 24% Walking and 19% Atmospheric Characteristics.</p>
Aspects Least Enjoyed	<p>80% could not think of anything that they had least enjoyed, 8% made critical remarks about the weather, 2% complained about general high costs in general, 1% poor service with accommodation, 1% dogs in areas/dog mess, 1% poor services with food outlets, and 1% lack of parking.</p> <p><u>Online visitors</u>: 81% of online visitors could not think of anything they had least enjoyed, 6% made critical remarks about the weather and 3% mentioned damage to the environment and historic buildings.</p>
Improvement Suggestions	<p>When respondents were asked what they would like to see improved in Pembrokeshire, 54% said 'Nothing' and 4% 'Keep it as it is'. The top suggestions were Provide More Toilets (4%), Better Eateries (4%), Better Shopping Provision (4%) and Improve Cleanliness (4%).</p> <p><u>Online visitors</u>: 46% said 'Nothing' or 'Don't Know' and a further 15% said 'Keep it as it is'. The top suggestions were to Improve Public Transport Links (6%), Improve Road Infrastructure (6%) and Take Greater Care of the Natural Environment (4%).</p>
Likelihood of future visits	<p>79% said that they would be either Very Likely (61%) or Quite Likely (18%) to visit Pembrokeshire in the next 12 months.</p> <p>91% stated that they were either Very Likely (75%) or Quite Likely (16%) to visit in the next 1 to 5 years.</p> <p><u>Online results</u> show that 76% were likely to visit Pembrokeshire in the next 12 months on an overnight visit. 31% indicated that they would be likely to visit on a day trip.</p>