

# Tenby Tourism Growth Area Visitor Survey 2007/2008 Final Report



**Parc Cenedlaethol  
Arfordir Penfro**  
**Pembrokeshire Coast  
National Park**

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Research

Written by

Chantal Trembath and Kathrin Tennstedt  
QA Research  
Brackenhill  
St Georges Place  
YORK  
YO24 1DT  
01904 632039  
[Chantal.trembath@qaresearch.co.uk](mailto:Chantal.trembath@qaresearch.co.uk)  
[www.qaresearch.co.uk](http://www.qaresearch.co.uk)

# Contents

<b>Executive Summary .....</b>	<b>3</b>
<b>1. Introduction .....</b>	<b>6</b>
<b>2. Aims and Objectives.....</b>	<b>6</b>
<b>3. Methodology.....</b>	<b>7</b>
<b>4. Key Findings .....</b>	<b>9</b>
4.1 Type of Visitor .....	9
4.2 Profile of Visitor .....	10
4.3 Pattern of Staying Visitors .....	17
4.4 Mode of Transport .....	22
4.5 Expenditure.....	23
4.6 Activities Undertaken.....	24
4.7 Motivations for Visiting.....	29
4.8 Experience of visit.....	32
4.9 PR Question.....	41
<b>5. Summary Conclusions and Recommendations .....</b>	<b>42</b>
5.1 Profile of visitors.....	42
5.2 Pattern of staying visitors.....	42
5.3 Mode of transport .....	43
5.4 Activities undertaken.....	43
5.5 Motivations for visiting .....	44
5.6 Experience of visit.....	44
<b>6. Appendices .....</b>	<b>46</b>
Appendix 1: Questionnaire .....	46
Appendix 2: Interview locations.....	52
Appendix 3. Additional Verbatim comments .....	52
Appendix 4. Cross-tabulations for TGA Area Only .....	57
Appendix 5. Extra Cross-tabulations TGA Area Only Q12, Q13 and Q22.....	57

## Executive Summary

This executive summary presents the overall findings for the 2007/2008 Tenby Tourism Growth Area 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 visitor research project was conducted using face to face surveying.

The key findings below are based on 481 quantitative face to face surveys completed with visitors to the Tenby Tourism Growth Area between July 2007 and June 2008.

<b>PROFILE OF VISITORS</b>	
<b>Visitor Type</b>	<p>72% were staying visitors and 28% were day visitors. 59% 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 (73%) and Spring (58%).</p> <p>The proportion of day visitors was higher during Autumn (48%) and Winter (44%).</p>
<b>Previous Visits</b>	<p>58% of respondents had visited the area in the past 12 months. The number of regular repeat visitors was higher during Autumn (73%) and Winter (77%).</p> <p>15% of visitors had never visited the area before. There were a higher proportion of first-time visitors during Summer (19%), compared to Winter (8%).</p> <p>64% of all past visitors were regular visitors. Of these, 14% visited each month/each week, 25% visited three to four times a year and 25% visited about once a year.</p>
<b>Gender</b>	55% of respondents were female and 45% male; these figures were fairly consistent throughout the year.
<b>Age</b>	A broad range of age groups were attracted to the area. 35% were aged 35 to 54 years, 27% were aged 15 years and under and 27% aged 55 years plus.
<b>Party Size</b>	<p>The average party size was slightly smaller at 2.93 people (2.16 adults, 0.77 children) in 2008.</p> <p>62% of all visitors were without children and 38% visited with children.</p>
<b>Dogs on Holiday</b>	10% of all visitors brought a dog with them. This rose to 16% during Autumn.
<b>Origin of Visitors</b>	<p>59% of visitors to the area were from Wales. The highest proportion of visitors from Wales occurred in Autumn (86%) and Winter (81%).</p> <p>A high proportion of visitors were from areas bordering Wales; 12% from the West Midlands, 4% South West and 8% North West. Only 2% visited from London.</p>
<b>Social Grade</b>	<p>61% of visitors were in grades A/B/C1. UK average is 54%.</p> <p>14% were in grades D/E. UK average is 25%.</p>
<b>PATTERN OF STAYING VISITORS</b>	
<b>Length of Stay</b>	<p>The average number of nights stayed overnight in Pembrokeshire was 6.53 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 (7.69 nights), and nearly double the length compared to other quarters. Shorter breaks were more popular during Autumn (50%), Winter (73%) and Spring (42%) compared to the Summer (23%).</p>
<b>Location of Accommodation</b>	The five most popular towns stayed in were Tenby (44%), Saundersfoot (16%), Manorbier (5%), Narberth (4%) and Pembroke (4%).

<b>Type of Accommodation</b>	66% of visitors stayed in Paid Accommodation and 35% stayed in Free Accommodation.  The most popular types of Paid Accommodation were hotels (20%), self-catering (18%) and rented static caravans (11%).
<b>Time of Booking Accommodation</b>	29% of visitors booked between 3 to 6 months in advance; 16% booked within 2 weeks of arrival. A significantly higher proportion of Autumn (25%) and Winter (35%) visitors booked within the last two weeks compared to Summer (15%) and Spring (14%).
<b>Rating of Accommodation</b>	Overall ratings for Location (4.69 mean), Cleanliness (4.64 mean), Customer Service (4.64 mean), Value for Money (4.46 mean) and Quality of Decor and Facilities (4.54 mean) were rated between "Good" and "Very Good".
<b>MODE OF TRANSPORT</b>	
<b>Mode of Transport to Pembrokeshire</b>	The main mode of transport for 84% of visitors was a motorised vehicle (car, motorbike and motor-home). 5% used public transport in the form of buses, coaches and trains.
<b>EXPENDITURE</b>	
<b>Expenditure</b>	The total spend per day (excluding accommodation) was £27.79 per person and £59.21 per day per party.  For accommodation, the average spend per party per night was £53.25 and per person per night was £23.49.  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.
<b>ACTIVITY UNDERTAKEN</b>	
<b>Activities Undertaken</b>	On average visitors took part in 5 activities during their stay. The most popular activities included Eating & Drinking out (65%), Short Walks (62%), visiting natural attractions (59%), shopping (57%) and passive beach activities (50%).  A wider range of activities were participated in during Summer and Spring compared to Winter and Autumn.
<b>Main Activity Undertaken</b>	When asked to identify their main activity, 23% said visiting a Natural Attraction (e.g. coastline, countryside, island, nature reserve), 13% Passive Beach Activities, 12% Visiting family/theme parks.
<b>Usage of Coastal Path</b>	44% of walking visitors had used or were going to use The Coastal Path.
<b>Towns/Areas Visited</b>	89% of respondents visited Tenby, followed by Saundersfoot (42%), Pembroke (21%), St. Davids (20%) and Haverfordwest (19%).  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.
<b>MOTIVATIONS FOR VISITING</b>	
<b>Source of Information</b>	The most popular source of information that influenced the decision to visit was Previous Experience (69%), followed by Recommendation/Word of Mouth (15%), Website/Internet Search (9%), Pembrokeshire Holiday Guide (3%) and Visit Wales brochure (2%).
<b>Reasons for Choosing to Visit</b>	The most common reason cited for visiting was Previous Visit (68%), followed by Scenery & Landscape (54%), the Atmospheric Characteristics (36%) and Award-winning Beaches (27%).  When asked to identify their main reason for visiting, 26% said Previous Visit, followed by Scenery & Landscape (18%) and to Visit Family, Friends or Second Home (11%).
<b>EXPERIENCE OF TRIP</b>	
<b>Importance/ Performance Analysis</b>	The factors that scored highest in terms of importance to any holiday were Award Winning Beaches (4.29), a range of Natural Attractions to visit (4.11) and Opportunities for Walking (4.03).

	<p>The highest performance scores for the area were Award Winning Beaches (4.80 mean), Opportunities for Walking (4.71 mean) and a range of Natural Attractions to visit (4.60 mean).</p> <p>Lower rating performance scores (“Satisfactory to Good”) were given to Environmentally-friendly services and facilities (3.80 mean), High Quality Gardens and Garden Centres (3.59 mean) and Lively Nightlife (2.30 mean).</p> <p>Gap analysis shows that Facilities Open all Year round (0.11) and Excellent Eating Out experiences (0.07) were underperforming. There were negative scores for Open All Year Round in Winter (-0.09) and Spring (-0.22), while Eating Out received a negative score in Winter (-0.63).</p>
<b>Rating of Services and Facilities</b>	<p>The highest rated services/facilities were the Cleanliness of Beaches (4.45), General level of Litter and Cleanliness (4.30) and Signposts (4.14).</p> <p>Possible areas for improvement included Cleanliness of Public Transport (3.97), Car Parking (3.96), Availability of Public Toilets (3.88) and Public Transport (3.66). Public transport was rated consistently lower throughout the year and rated “Poor to Satisfactory” in the Autumn (2.60).</p>
<b>Satisfaction comparison with other UK Destinations</b>	<p>The Tenby Tourism Growth Area achieved high satisfaction scores (“Good” to “Very Good”) compared to other UK destinations; Overall Experience (4.73), Warmth of Welcome and Friendliness (4.67) and Value for Money (4.39).</p>
<b>Aspects Most Enjoyed</b>	<p>33% of respondents most enjoyed the Physical Scenery, 20% enjoyed the county's Atmospheric Characteristics and 16% Beaches.</p>
<b>Aspects Least Enjoyed</b>	<p>80% could not think of anything that they had least enjoyed, 9% made critical remarks about the weather, 2% complained about general high costs in general, 2% dogs in areas/dog mess, 1% poor service with accommodation, 1% poor services with food outlets, 1% lack of parking, 1% high cost of parking, and lack of toilets (1%).</p>
<b>Improvement Suggestions</b>	<p>When respondents were asked what they would like to see improved in Pembrokeshire, 54% said ‘Nothing’ and 5% ‘Keep it as it is’. The top suggestions were Provide More Toilets (5%), Improve Cleanliness (4%), more car parking (3%) and the weather (3%).</p>
<b>Likelihood of future visits</b>	<p>80% said that they would be either Very Likely (62%) or Quite Likely (18%) to visit Pembrokeshire in the next 12 months.</p> <p>84% stated that they were either Very Likely (66%) or Quite Likely (18%) to visit in the next 1 to 5 years.</p>

## 1. Introduction

QA Research is delighted to present the Tenby TGA Area overall findings for the 2007/2008 Pembrokeshire Visitor Survey research. This research is conducted on behalf of Pembrokeshire County Council (PCC), South West Wales Tourism Partnership (SWWTP) and Pembrokeshire Coast National Park Authority (PCNPA). This report outlines the key findings from 481 quantitative surveys completed with visitors within the Tenby TGA area between July 2007 and June 2008.

## 2. Aims and Objectives

As detailed on the Pembrokeshire tourism industry website, the Pembrokeshire area is a valuable tourism asset to the Welsh tourism economy. It attracts approximately 3.2 million tourists a year and generates approximately £343 million in spend to the Welsh economy<sup>1</sup>.

As one of the main objectives of Pembrokeshire County Council is to improve the quality of experience, it is important that the PCC, PCNPA and SWWTP undertake research to gain an understanding of visitors' current experience of the product and their motivations for visiting. The research findings will inform future decision making, product development and marketing activities<sup>2</sup>.

The Tenby TGA area is considered one of the main tourism hubs within Pembrokeshire. The results within this report provide the key findings of visitors to the Tenby TGA area. Key locations within the TGA area include Amroth, Carew, East Williamston, Kilgetty/Begelly, Manorbier, Penally, Saundersfoot and Tenby.

The overall aim of the study therefore is to:

**“Undertake research to measure the current performance of Tenby TGA as a visitor destination to inform future decision making, public sector investment priorities and partnership opportunities with community and tourism organisations.”**

Within this project aim the key objectives are to:

- Measure overall the visitor's experience of their trip against their expectations and likelihood of visiting again;
- Identify the strengths, weaknesses and areas for improvement to the TGA tourism product;
- Provide a profile of the types of visitor attracted to the TGA area, including social demographic information;
- Understand buyer behaviour and the decision making process including purpose of trip, motivations for visiting, previous visiting levels and marketing information sourced;
- Examine the visitor behaviour cycle including mode of transport, accommodation, length of stay, accommodation, popular activities undertaken and places and attractions visited;
- Conduct a robust piece of research which takes into consideration seasonal variations in order to consult with a mix of visitor types.

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<sup>1</sup> Sourced from <http://www.tourismhelp.co.uk>

<sup>2</sup> Sourced from PCC Draft Tourism Strategy 2006 to 2012

### 3. Methodology

Face-to-face interviewing was selected as the most effective primary method for undertaking visitor research. This methodology allows answers to be 'fresh in the respondent's mind' and increases sampling accuracy, particularly by location.

In total 23.5 researcher days have been completed during the Summer (11 days), Autumn (3 days), Winter (3 days) and Spring months (6 days). A total of 481 surveys have been completed and were conducted by experienced and trained interviewers sub-contracted by QA Research.

Table 1: Monthly proportion of interview completions

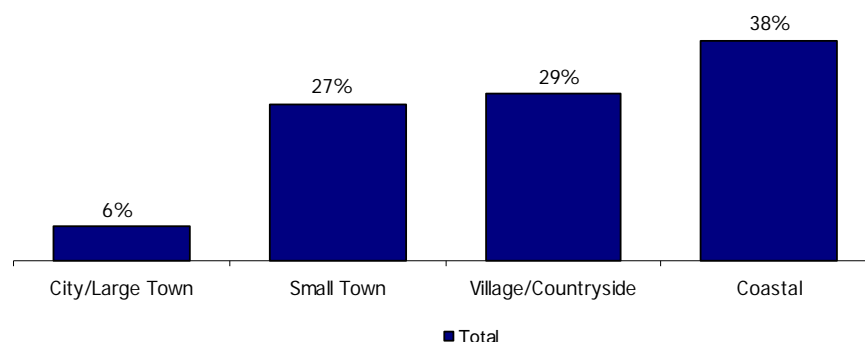
	Month Count	Month %
July	107	22%
August	49	10%
September	59	12%
October	33	7%
November	34	7%
December	0	0%
January	45	9%
February	19	4%
March	0	0%
April	12	2%
May	98	20%
June	25	5%
<b>Total</b>	<b>481</b>	<b>100%</b>

The table above shows that under half of surveys (44%) were completed during the Summer months (Jul to Sept), 14% were completed during the Autumn months (Oct to Dec), 13% were completed during the Winter months (Jan-Feb) and over a quarter (27%) were completed during the Spring months (Apr-Jun).

The average number of surveys completed per day remained fairly level throughout the year ranging from 19 to 22 surveys completions per day.

All 481 surveys (during Summer, Autumn, Winter and Spring) were completed in the Tenby TGA region. In order to target a representative spread of visitors, interviews were conducted at a range of location points within the Tenby TGA area including Tenby, Carew Castle, Colby Woodland Gardens, Saundersfoot and Manorbier.

Chart 1: Type of location points



Interviews also took place in a range of towns, villages, countryside and coastal locations, to allow us to capture a good range of visitors. Just over a third of interviews took place in coastal locations.

Table 2: Inside/Outside National Park boundary

	Total	Summer	Autumn	Winter	Spring
Inside National Park	76%	82%	37%	30%	100%
Outside National Park	24%	19%	63%	70%	0%
<b>Total</b>	<b>100%</b>	<b>101%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

During Summer 82% of the interviews were conducted within the National Park boundary, 37% during Autumn, 30% during Winter and 100% during Spring.

### Questionnaire and analysis

The questionnaire was devised in partnership with PCC, SWWTP and PCNPA. A copy of the questionnaire can be found in appendix 1 and additional verbatim comments in appendix 2.

The total sample of 481 respondents gives us results that are within standard industry 95% confidence levels and a +/-5% standard error rate at +/-4.5%. The overall sample of results provides a statistically reliable representation of the sample population. However please note that as seasonal sub-samples are outside the standard industry +/- 5% error rates, results must be seen as indicative rather than being statistically robust.

Once all the surveys were completed, quality checking was carried out prior to inputting and after inputting stages. Validation calls were also carried out by the fieldwork manager with a sample of visitors to ensure that surveys were completed to MRS standards. All surveys were inputted and analysed using SPSS analysis software. Two sets of crosstabs can be found in appendices 3 and 4. These include:

- Appendix 3 crosstabs: Q1 Visitor type, Q23 Frequency of Visits (repeat, first time visitor), Q24 Age, Q24 Family Type and Q27 Social Grade
- Appendix 4 additional crosstabs: Q12 Place of stay, Q13 Type of accommodation, and Q22 Last visit to Pembrokeshire

It is important to notice that there are smaller sample sizes for the cross-tabulations. Hence the cross-tabulations cannot be considered to be statistically significant but can be considered to still be indicative.

Please also note that a number of questions may add up to over 100% as they are multiple responses, i.e. respondents have been asked to select more than one answer. Also, due to rounding, certain questions may add up to more than 100%.



## 4. Key Findings

The key findings for interviews that took place in Pembrokeshire are broken down under the following headings:

- Type of visitor
- Profile of visitor
- Pattern of staying visitors
- Mode of transport
- Activities undertaken
- Motivations for visiting
- Experience of visit
- PR question

Author's comments are shown in a text box after selected questions.

### 4.1 Type of Visitor

Table Q1: Type of Visitor

	Total %	Summer %	Autumn %	Winter %	Spring %
Staying visitor in overnight accommodation within Pembrokeshire	59%	73%	34%	38%	58%
Day trip from your home over 3 hours time spent	28%	13%	48%	44%	33%
Staying visitor with friends or relatives in Pembrokeshire	9%	8%	10%	13%	6%
Staying visitors from overnight accommodation elsewhere in Wales	4%	5%	3%	3%	2%
Staying visitors with friends or relatives elsewhere in Wales	1%	0%	5%	3%	1%
Business visitor in overnight accommodation within Pembrokeshire	0%	0%	0%	0%	0%
Business visitor in overnight accommodation elsewhere in Wales	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

As table Q1 above illustrates, the largest proportion of visitors (59%) were staying visitors in overnight accommodation within Pembrokeshire, followed by those who went on a day trip from home and staying for over 3 hours (28%).

The proportion of day visitors was higher during Autumn (48%) and Winter (44%).

Respondents visiting during Summer and Spring were more likely to be staying in overnight accommodation within Pembrokeshire than those in Autumn and Winter. Visitors in Autumn and Winter were more likely to be day visitors than those in other quarters. Results were reflective of the overall Pembrokeshire survey results.

## 4.2 Profile of Visitor

### 4.2.1 Previous Visits

Table Q22: Time of Previous Visit to Pembrokeshire

	Total %	Summer %	Autumn %	Winter %	Spring %
Within the last 12 months	58%	51%	73%	77%	53%
1-2 years ago	13%	10%	6%	5%	22%
3-4 years ago	3%	5%	3%	2%	1%
5-6 years ago	2%	2%	3%	2%	2%
7-10 years ago	1%	1%	0%	0%	0%
More than 10 years ago	7%	11%	3%	3%	5%
Never	15%	19%	12%	8%	16%
Can't say	0%	1%	0%	5%	0%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

When asked when they had previously visited Pembrokeshire, over half (58%) of visitors had visited within the last 12 months. This figure was higher for Autumn and Winter (73% and 77%) suggesting that the Autumn and Winter seasons are attracting a higher proportion of regular visitors.

Around a sixth (15%) had never visited Pembrokeshire. A higher proportion of first-time visitors could be seen during the Summer quarter (19%), compared to the Winter quarter (8%).

A comparison with the overall Pembrokeshire visitor results shows a similar pattern of previous visiting results, with at 18% being first-time visitors compared to 15% amongst TGA visitors.

### 4.2.2 Frequency of Visiting Pembrokeshire/TGA

Table Q23: Frequency of Visiting Pembrokeshire

	Total %	Summer %	Autumn %	Winter %	Spring %
This is my first ever Pembrokeshire trip	15%	19%	12%	6%	16%
I am a regular visitor (monthly/weekly)	14%	17%	15%	9%	12%
I tend to visit 3 to 4 times a year	25%	14%	27%	64%	23%
About once a year	25%	20%	36%	5%	36%
Every few years	10%	15%	5%	6%	7%
I have visited before-but long time ago	10%	14%	6%	8%	7%
No answer	1%	2%	0%	2%	0%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

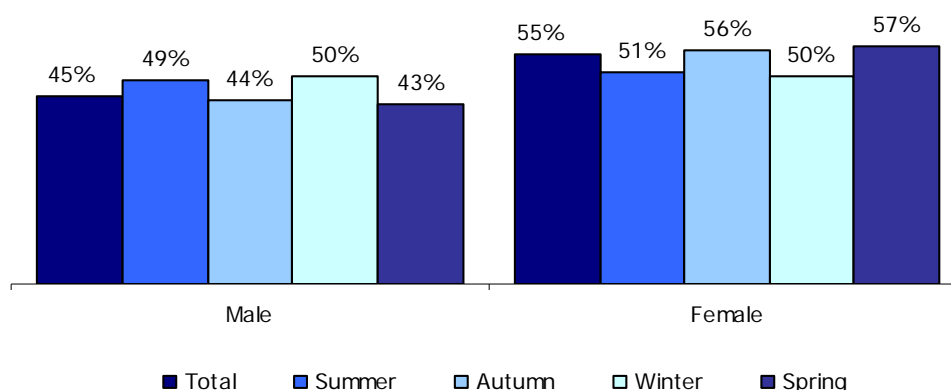
Visitors were asked how frequently they visited Pembrokeshire. Nearly two thirds of all Winter visitors (64%) were regular visitors to Pembrokeshire, visiting each month/each week (14%), three to four times a year (25%) or about once a year (25%).

A further 15% stated that 'this is my first ever trip to Pembrokeshire' reflecting the results from the previous section on previous visits.

Similar to the overall Pembrokeshire results, fewer first time visitors visited during the off-peak times in Autumn and Winter.

### 4.2.3 Gender

Chart Q24: Gender



There was a fairly even split in terms of gender amongst the visitors during the course of the year, with 55% being female and 45% being male.

Comparison with the Pembrokeshire results shows that a slightly higher proportion of female visitors were interviewed in the Tenby Tourism Growth Area during Spring (57%) compared with Pembrokeshire as a whole (52%).

### 4.2.4 Age

Respondents were asked to state the ages of the people within their party.

Table Q24: Age of visitors

	UK Population 2001	Total %	Summer %	Autumn %	Winter %	Spring %
Under 5 years	6%	7%	6%	8%	16%	4%
5 to 9 years	6%	11%	12%	16%	14%	6%
10 to 15 years	7%	8%	8%	14%	5%	7%
16 to 18 years	6%	1%	1%	2%	0%	1%
19 to 24 years	6%	4%	5%	4%	6%	2%
25 to 34 years	15%	7%	6%	8%	14%	5%
35 to 44 years	15%	19%	20%	15%	25%	18%
45 to 54 years	13%	12%	11%	14%	10%	15%
55 to 64 years	11%	12%	12%	9%	7%	17%
65 to 74 years	8%	13%	13%	12%	2%	17%
75 years plus	7%	5%	6%	0%	1%	9%
<b>Base</b>	<b>100%</b>	<b>1406</b>	<b>684</b>	<b>206</b>	<b>147</b>	<b>369</b>

The table above shows a broad range of age groups were attracted to the TGA area. Overall just under a third of visitors were aged 35 to 54 years (31%) and aged 55 years plus (30%) and just over a quarter of visitors were aged 15 years and under (26%)

Results further show that a lower proportion of visitors aged 16 to 34 years (12%) visited the TGA area.

When comparing the different seasonal results, the Winter (30%) and Autumn (24%) results show a higher proportion of visitors aged nine and under compared to Summer (18%) and Spring

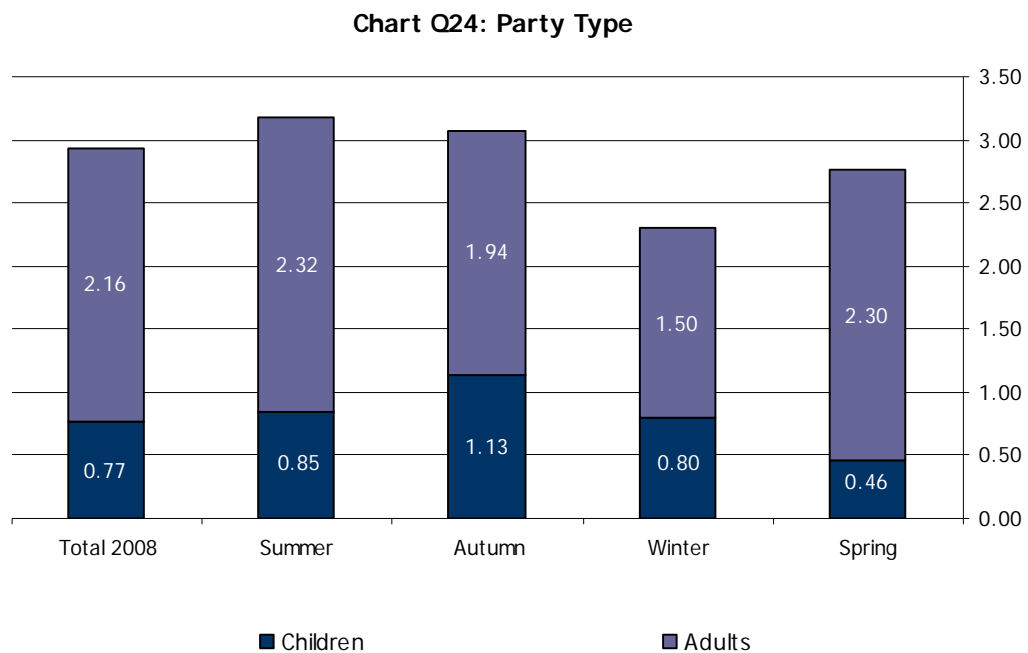
(10%) quarters. Results suggest that younger families were visiting during these quarters; this may be partly as a result of the October, November and February half term periods.

When comparing results with the Pembrokeshire visitor survey results, no significant variations can be seen.

The results suggest that the pattern of age groups remains fairly similar for each quarter, with age groups being predominantly 35 years and over; however some fluctuations can be seen with younger families visiting during the Autumn and Winter quarter.

#### 4.2.5 Party Size

Visitors were asked to provide information about the number of people in their party. The average number of children, adults, and the total are illustrated in the chart below.



Base: Total 481; Summer 215; Autumn 67; Winter 64; Spring 135

Overall the average number of people per party was 2.93 people, with an average of 0.77 children and 2.16 adults in each party.

##### Children

The number of children per party ranged from one child to three children. A total of 38% of all visitors visited with children and 62% visited without children.

Out of the 182 respondents who visited with children the largest proportion of visitors visited with two children (46%).

##### Adults

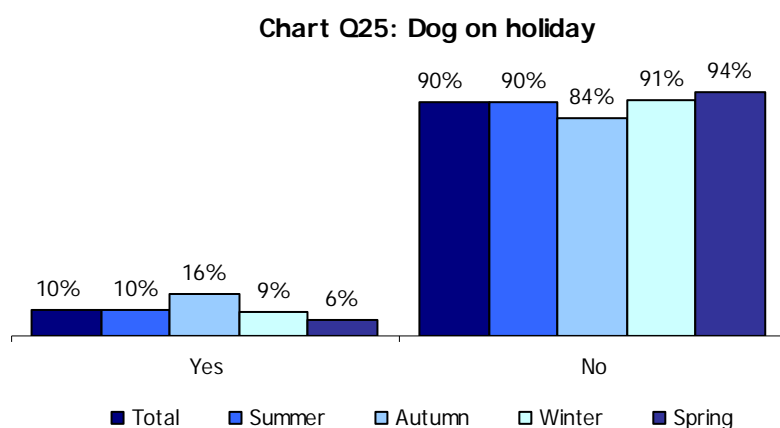
The number of adults per party ranged from one to ten adults. The most frequently occurring number of adults per party was two adults per party (60%), followed by one adult (21%).

Results show that the TGA area attracted a lower proportion of family groups in the Spring quarter (30%) compared with other periods. Conversely Autumn attracted the highest proportion of family groups (51%), followed by Winter (39%) and Summer (38%). However please note that these results are based on smaller sample sizes.

Summer had the highest average party size of the four quarters at 3.17 people per group with Winter having the lowest average size at 2.30 people, suggesting that unsurprisingly the Summer quarter attracts more families. These results mirror the overall Pembrokeshire Visitor Survey results, which show that the average party size during the Summer quarter was the highest, with 3.19 people.

#### 4.2.6 Dog on Holiday

Respondents were asked if they had brought a dog with them on holiday.



Base: Total: 481; Summer 215; Autumn 67; Winter 64; Spring 135

As the chart Q25 above illustrates, 10% of all visitors interviewed brought a dog with them on holiday. The high point was the 16% of visitors who brought a dog with them during the Autumn quarter.

A slightly higher proportion of all Pembrokeshire visitors brought a dog on holiday (13%) compared to TGA visitors (10%).

#### 4.2.7 Origin of Visitor

A total of 390 respondents provided postcodes. A total of 16 respondents (3%) were from overseas, with their country of origin being Italy, Australia, Poland, and various other countries. For a full list please see Appendix 2.

Figure Q26: Origin of visitors

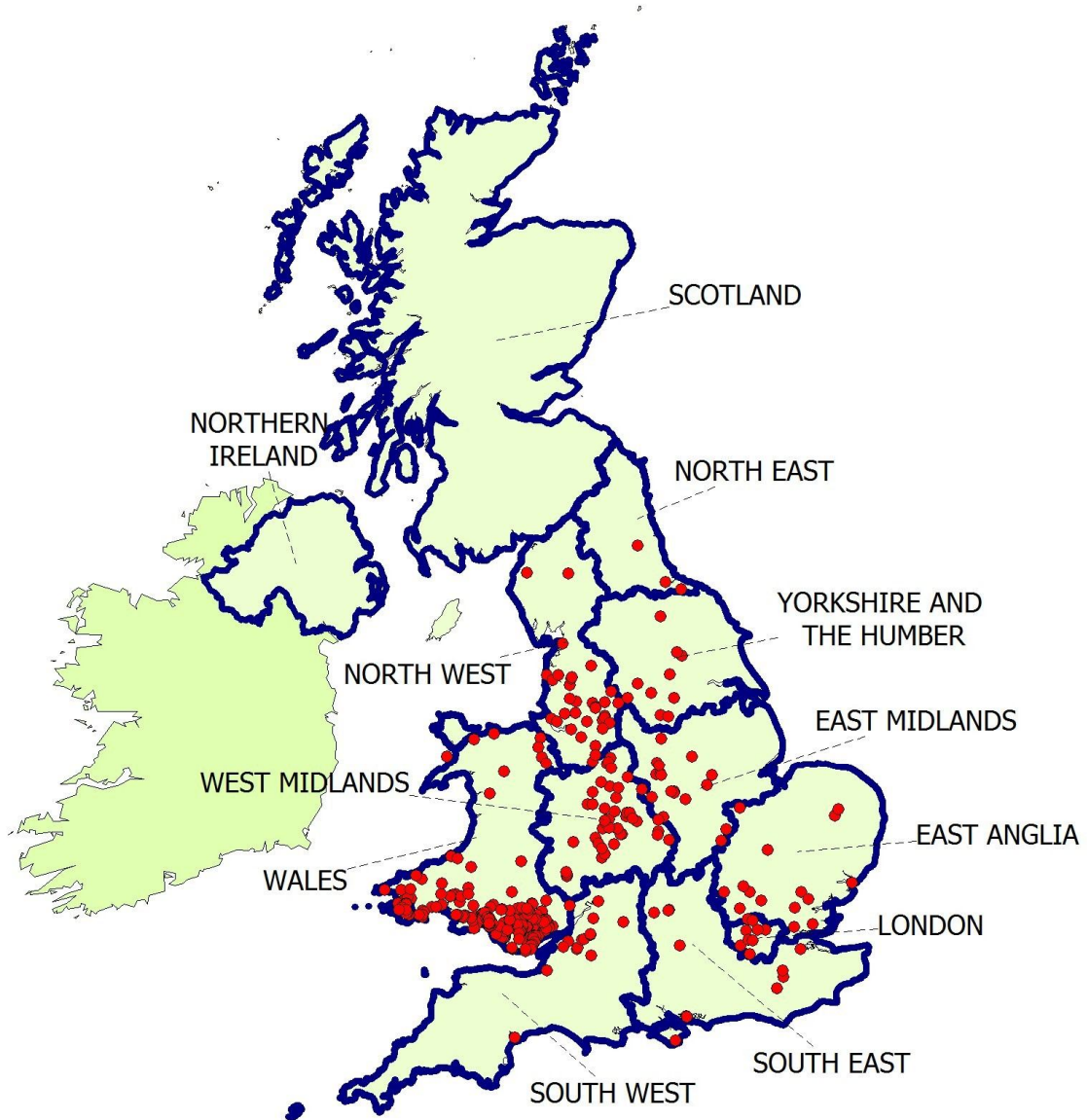


Table Q26: Origin of UK visitors

	<b>Total 2008 %</b>	<b>Summer %</b>	<b>Autumn %</b>	<b>Winter %</b>	<b>Spring %</b>
Wales	59%	46%	86%	81%	59%
West Midlands	12%	16%	4%	5%	9%
North West	8%	11%	4%	0%	10%
East Midlands	4%	5%	0%	5%	4%
East Anglia	4%	5%	0%	0%	6%
South West	4%	5%	4%	0%	6%
Yorkshire & Humber	3%	4%	0%	3%	1%
South East	3%	3%	0%	3%	5%
London	2%	4%	0%	2%	1%
North East	1%	1%	4%	0%	0%
Northern Ireland	0%	1%	0%	0%	0%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Overall results show that just under two thirds of visitors to the TGA area were from Wales (59%). Figure Q26 shows that a high proportion of Welsh visitors were from South Wales.

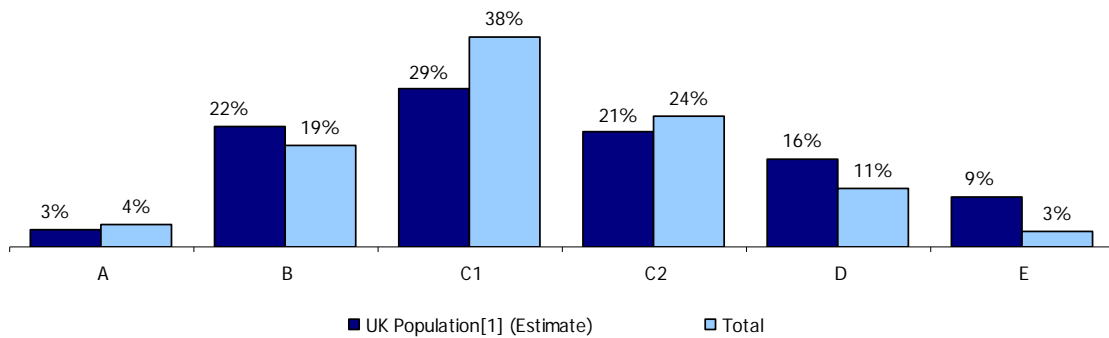
Just over a tenth of visitors were from the West Midlands (12%) and just under a tenth were from the North West (8%).

Results show that during the Winter (81%) and Autumn (86%) months there was a significantly high proportion of visitors from Wales. This may be attributed to the fact that a high proportion of visitors were day visitors during these quarters. Both Summer and Spring quarters attracted a broader spread of visitors.

When comparing the TGA area results (58%) with the overall Pembrokeshire survey findings (50%), a slightly higher proportion of visitors come from Wales. A slightly lower proportion come from the South West (4%) compared to the overall Pembrokeshire survey findings (8%).

## 4.2.8 Social Grade

Chart Q27: Social Grade



Base: 481

The majority of visitors to the TGA area were from middle social grades. Around two thirds of respondents fell into the C1/C2 social grade categories (62%). A lower proportion of visitors belonged to the lower social grades D (11%) and E (3%).

Results were fairly in line with the main Pembrokeshire visitor survey results. When comparing the results with the UK population<sup>3</sup>, the TGA area was seen to attract people from the middle social grades; with 50% of the UK population belonging to social grades C1 and C2, compared with 62% of TGA area visitors. The TGA area (14%) also attracted a lower proportion of D/E social grades compared to the national average (25%).

TGA area visitors were slightly less likely to belong to higher social grades A/B (23%) compared to all Pembrokeshire visitors (30%). On the contrary a higher proportion of TGA visitors belonged to the mid-social grades C1/C2, at 62%, compared to 53% of all Pembrokeshire visitors.

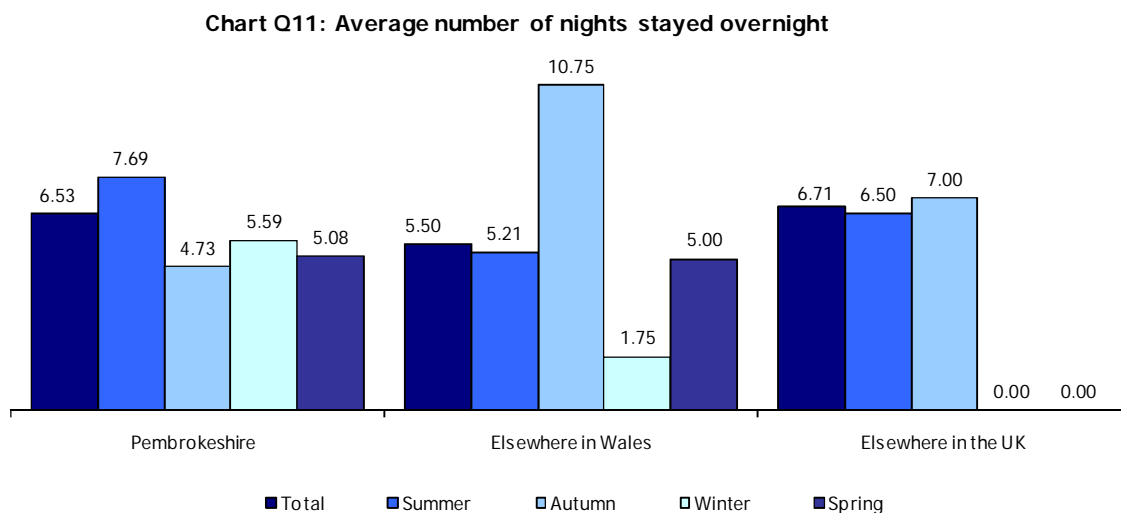
<sup>3</sup> [1] Based on the Tables produced from the 2005 National Readership survey. Estimates are derived from personal interviews with a representative sample of the adult population (aged 15+) of Great Britain. Over the 12 months January - December 2005, the total number of adults interviewed was 35,947 and the total adult population was estimated at 47,771,000 (individuals aged 15+).



## 4.3 Pattern of Staying Visitors

### 4.3.1 Length of Stay

Staying visitors were asked how many nights they had stayed overnight during this visit, in Pembrokeshire, elsewhere in Wales and elsewhere in the UK. Please note that significantly smaller sample sizes were given for the Autumn and Winter quarters.



Base: Total - 326 Pembrokeshire, 26 Elsewhere in Wales, 7 Elsewhere in the UK  
 Base: Summer - 177 Pembrokeshire, 14 Elsewhere in Wales, 4 Elsewhere in the UK  
 Base: Autumn - 30 Pembrokeshire, 4 Elsewhere in Wales, 3 Elsewhere in the UK  
 Base: Winter - 32 Pembrokeshire, 4 Elsewhere in Wales, 0 Elsewhere in the UK  
 Base: Spring - 87 Pembrokeshire, 4 Elsewhere in Wales, 0 Elsewhere in the UK

#### Number of nights in Pembrokeshire

The majority of staying visitors (91%) had stayed overnight within Pembrokeshire. The average number of nights stayed overnight in Pembrokeshire was 6.53 nights. The mode (most common response) was 7 nights (33%). The number of nights ranged from 1 to 56 nights.

Just over one third of overnight visitors (38%) were on a short break of 1 to 4 nights and over half (62%) were on long breaks of 5 plus nights.

Table Q11a: Proportion of short and long stay breaks

	Total	Summer	Autumn	Winter	Spring
Short breaks	38%	23%	50%	73%	42%
Long breaks	62%	77%	50%	27%	58%

The table above shows further the proportion of short and long breaks taken for each quarter. Short breaks were seen to be more popular during the Winter quarter (73%) and Autumn quarter (50%) than Summer and Spring (23% and 42% respectively).

#### Number of nights elsewhere in Wales

A total of 7% of visitors had also stayed or were staying overnight elsewhere in Wales. The average number of nights stayed overnight elsewhere in Wales during was 5.50 nights. The mode was 7 nights (31%). The number of nights ranged from 1 to 30 nights.

## Number of nights elsewhere in the UK

Around 2% of visitors stayed overnight in other areas of the UK. The average number of nights stayed overnight elsewhere in the UK was 6.71. The mode was 7 nights (43%). The number of nights ranged from 2 to 14 nights.

The results suggest that the TGA area attracts both short stay and long stay visitors. Results show that the TGA area attracted a higher proportion of short stay visitors (i.e. 1 to 4 nights) during the Winter period (72%) compared to the Spring (42%), Autumn (57%) and Summer (24%) quarters.

When comparing the TGA results with the Pembrokeshire results overall, slight differences emerge with regard to the proportion of short breaks in Autumn and Winter months. The TGA area shows a higher proportion of short breaks during the Winter quarter (73%) than Pembrokeshire (56%) and a lower proportion of short breaks during the Autumn quarter (50%) than Pembrokeshire as a whole (66%).

### 4.3.2 Location of Accommodation

Visitors who were staying overnight in Pembrokeshire only (326 respondents, 91%), were asked to state the town or area their accommodation was based in. A vast range of locations were mentioned, and a full list can be found in Appendix 3, page 56.

Please note that significantly small sample sizes were given for the Autumn and Winter quarters.

Table Q12: Location of Accommodation

	Total %	Summer %	Autumn %	Winter %	Spring %
Tenby	44%	40%	43%	60%	47%
Saundersfoot	16%	20%	0%	3%	21%
Manorbier	5%	5%	7%	3%	5%
Narberth	4%	4%	0%	9%	3%
Pembroke	4%	5%	7%	3%	0%
St Florence	3%	4%	0%	3%	1%
Amroth	2%	2%	3%	0%	3%
Penally	2%	2%	7%	0%	1%
Lydstep	2%	2%	0%	6%	0%
Kilgetty	2%	2%	0%	0%	2%
Fishguard	2%	1%	0%	0%	6%
St. Davids	2%	2%	0%	2%	1%
New Hedges	2%	2%	0%	0%	1%
Bosherston	1%	2%	0%	0%	0%
Milford Haven	1%	1%	0%	0%	1%
Haverfordwest	1%	1%	0%	0%	0%
Newport	1%	0%	3%	0%	1%
Broad Haven	0%	1%	0%	0%	0%
Broadmoor	0%	1%	0%	0%	0%
Freshwater East	0%	1%	0%	0%	0%
Solva	0%	1%	0%	0%	0%
Newgale	0%	1%	0%	0%	0%
Other	10%	13%	37%	2%	5%
<b>Total</b>	<b>102%</b>	<b>113%</b>	<b>107%</b>	<b>91%</b>	<b>99%</b>
	<b>326</b>	<b>174</b>	<b>30</b>	<b>32</b>	<b>90</b>

The most popular town that TGA visitors stayed in was Tenby (44%). Results do show that there was some movement from visitors who were staying outside of the TGA area, for example those staying in Pembroke (4%).

When comparing results from different quarters, it emerges that there was an increase in the proportion of visitors staying in Tenby during the Winter quarter (60%). Interestingly the coastal resort of Saundersfoot was a much more popular place to stay in the warmer seasons of Summer (20%) and Spring (21%) than in Autumn (0%) and Winter (3%).

When comparing results with the overall Pembrokeshire visitor survey findings, both visitor results show that Tenby was the place where most overnight visitors' accommodation was located (44% for TGA visitors and 19% for all Pembrokeshire visitors).

### 4.3.3 Type of Accommodation

Visitors who were staying overnight in Pembrokeshire only were further asked what type of accommodation they had stayed in. Multiple responses were given. Please note that significantly small sample sizes were given for the Autumn and Winter quarters.

Table Q13: Type of Accommodation stayed in

	Total 2008 %	Summer %	Autumn %	Winter %	Spring %
<b>Paid Accommodation</b>	<b>66%</b>	<b>67%</b>	<b>53%</b>	<b>63%</b>	<b>75%</b>
Hotel/Motel/Lodge	20%	17%	20%	25%	25%
Self-catering	18%	18%	17%	16%	22%
Rented static caravan	11%	11%	17%	3%	11%
Guest House/B&B	9%	9%	0%	16%	9%
Rented touring caravan / Motor Home	1%	1%	0%	3%	0%
Inn/Pub	1%	0%	0%	0%	2%
Camping	6%	9%	0%	0%	5%
Youth Hostels Association (YHA)	0%	1%	0%	0%	0%
Group accommodation/ Bunk houses	0%	0%	0%	0%	0%
Boat/Yacht	0%	0%	0%	0%	0%
Other paid for accommodation	0%	1%	0%	0%	0%
<b>Free Accommodation</b>	<b>35%</b>	<b>38%</b>	<b>47%</b>	<b>37%</b>	<b>26%</b>
Owned static caravan	10%	13%	13%	3%	8%
Friends' and relatives' main home	8%	5%	13%	22%	7%
Owned touring caravan/Motor home	8%	11%	7%	0%	6%
Friends' and relatives' second home	6%	7%	3%	6%	3%
Own second home	3%	2%	7%	6%	2%
Free camping	0%	0%	0%	0%	0%
Boat/Yacht	0%	0%	0%	0%	0%
Other	0%	0%	3%	0%	0%
<b>Multiple Responses Total</b>	<b>101%</b>	<b>105%</b>	<b>100%</b>	<b>100%</b>	<b>101%</b>
<b>Base</b>	<b>326</b>	<b>174</b>	<b>30</b>	<b>32</b>	<b>90</b>

As the table above illustrates, two thirds of respondents stayed in paid accommodation (66%), compared to 35% who stayed in free accommodation.

The most popular types of 'paid' accommodation were hotel/motel/lodge (20%), self-catering (18%) and a rented static caravan (11%).

A mix of free accommodation was used. The most popular free accommodation included staying in their own static caravan (10%), friends and relatives' main home (8%) and owned touring caravan /Motor home (8%).

When comparing the results by season, some differences emerge. Respondents in the Autumn and Winter quarters were more likely to be staying with friends and relatives (13% and 22% respectively) compared to those in Summer (5%) and Spring (7%).

A list of 'other' forms of paid for and free accommodation can be found in Appendix 3, page 56.

#### 4.3.4 Time of Booking Accommodation

The 213 visitors who had stayed in paid accommodation were asked when they had booked their paid accommodation. Please note that significantly small sample sizes were given for the Autumn and Winter quarters.

Table Q15: Time of booking accommodation

	Total %	Summer %	Autumn %	Winter %	Spring %
On arrival	9%	11%	6%	5%	10%
Within the last 2 weeks	16%	13%	25%	35%	14%
Between 2 weeks to a month	12%	10%	6%	25%	11%
Between 1 to 3 months	14%	15%	19%	30%	6%
Between 3 to 6 months	29%	28%	31%	0%	38%
Between 6 to 12 months in advance	14%	17%	13%	0%	13%
More than 12 months ago	1%	2%	0%	0%	0%
Don't know/can't recall	5%	4%	0%	5%	8%
<b>Base</b>	<b>213</b>	<b>115</b>	<b>16</b>	<b>20</b>	<b>62</b>

Just under one third of Tenby visitors who stayed in paid accommodation had booked their accommodation between 3 to 6 months (29%), followed by a sixth who had booked two weeks prior to arriving (16%). Only 1% booked over 12 months in advance and these were all Summer visitors.

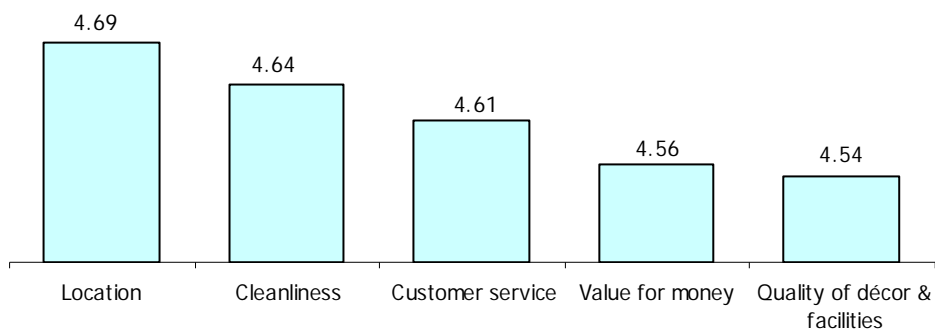
The results show that the lead time between booking and visiting was shorter (i.e. 3 months and under) during the Winter period (100%) compared to the Autumn (56%), Summer (49%) and Spring (41%) quarters.

A higher proportion of TGA visitors booked their accommodation 3 to 6 months in advance (29%) compared to all Pembrokeshire visitors (16%), suggesting that TGA visitors are more likely to book in advance.

### 4.3.5 Rating of Accommodation

This question was only asked to visitors who had stayed in paid accommodation. Pembrokeshire visitors were also asked to rate different aspects of their accommodation on a scale from 1 to 5, with 1 being very poor and 5 being very good. Chart Q14 below shows the mean values.

**Chart Q14: Rating of Accommodation**



Positively, the overall ratings for all aspects all received between good and very good results (4.69 mean for location, 4.64 mean for cleanliness, 4.61 mean for customer service, 4.56 mean for value for money, 4.54 mean for quality of decor and facilities).

When comparing results by season, the Winter quarter showed a mean rating of 5.00 (i.e. very good) was given for each of the five different categories. Overall Autumn respondents gave lower scores compared to the other quarters, in particular for customer service at 4.07. However results were still rated 'good'. It should be noted that both the Autumn and Winter scores had the lowest bases of 15 and 19 respondents respectively.

Overall results show that high satisfaction ratings were achieved for accommodation provision and that these ratings were generally slightly higher than for the overall Pembrokeshire results.

However, in line with the Pembrokeshire results, location and cleanliness received the highest scores from TGA visitors and quality of decor and facilities received the lowest mean scores. Overall TGA visitors gave higher ratings for accommodation compared to all Pembrokeshire visitors.

## 4.4 Mode of Transport

### 4.4.1 Main Mode of Transport to Pembrokeshire

Visitors were asked to state the main mode of transport they had used to travel to the TGA area. Some respondents used more than one mode of transport, therefore multiple responses are provided below.

Table Q6a: Main Mode of Transport to TGA area

	Total %	Summer %	Autumn %	Winter %	Spring %
Car	84%	86%	93%	100%	70%
Organised coach trip	8%	3%	6%	0%	21%
Train	3%	4%	0%	0%	4%
Aeroplane	3%	4%	3%	2%	1%
Public bus/coach	2%	5%	0%	0%	0%
Motorhome	2%	3%	0%	0%	2%
Motorbike	1%	1%	0%	0%	2%
Ferry	0%	1%	0%	0%	0%
Boat/Yacht	0%	1%	0%	0%	0%
Taxi	0%	0%	0%	0%	0%
Walk/on foot	0%	0%	0%	0%	0%
Bicycle	0%	0%	0%	0%	0%
Other	0%	0%	1%	0%	0%
<b>Multiple Responses Total</b>	<b>104%</b>	<b>108%</b>	<b>103%</b>	<b>102%</b>	<b>101%</b>
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

The majority of TGA visitors' (84%) main mode of transport was a motorised vehicle: car, motorbike and motor-home. A total of 5% used public transport in the form of public buses/coaches and trains.

Some seasonal variations could be noticed:

- The use of public transport (train and bus) was higher in the summer period (9%) compared to other seasons.
- Spring visitors were more likely to be part of an organised coach trip (21%) than visitors in other seasons.

Those respondents that had arrived by aeroplane were asked which airport they had arrived at. The answers ranged from London airports to other UK airports. For a full list of airports please see Appendix 3, page 54.

Overall results show that the car remains the main mode of transport used.

Similar to the overall Pembrokeshire results, the majority of TGA visitors arrived by car (84%, compared to 87% of all Pembrokeshire visitors). The proportion of organised coach trips was slightly higher amongst TGA visitors (8%) compared to all Pembrokeshire visitors (5%).

## 4.5 Expenditure

Table Q7: Spend

	Total	Summer	Autumn	Winter	Spring
Accommodation per group	£53.25	£58.77	£47.53	£41.63	£51.52
Accommodation per person	£23.49	£23.61	£19.82	£30.43	£23.18
Total Spend per group	£59.21	£43.02	£51.56	£117.78	£75.64
Total Spend per person	£27.79	£16.70	£25.86	£83.97	£35.84
<b>Base</b>	<b>Varying</b>	<b>Varying</b>	<b>Varying</b>	<b>Varying</b>	<b>Varying</b>

All respondents were asked how much they had spent on their trip that day. The total spend per day (excluding accommodation) was £27.79 per person and £59.21 per day per group.

For accommodation, the average spend per party per night was £53.25 and per person per night was £23.49.

There were no major variations seen between the TGA visitor results and the overall Pembrokeshire results in terms of total spend. However the total spend per group was slightly higher amongst all Pembrokeshire visitors during the Autumn quarter (£63.05 compared to the TGA results £51.56)

When comparing the different seasonal results, the total spend per person increased significantly during the Winter period. This might be explained by the relatively small sample size and also by the fewer opportunities to participate in 'free' outdoor activities such as walking in Winter because of poorer weather conditions. Also a number of people had spent a large amount on shopping (i.e. 7 out of 20 people spent £200 and over), which may have skewed results for this quarter. Therefore care should be taken when interpreting these results.

The results show that during the Winter months visitors remain a valuable contributor to the local economy.

Perhaps understandably spend on accommodation per group was highest during the Summer peak season (£58.77) followed by Spring (£51.52). Accommodation per person was highest in the Winter quarter (£30.43), perhaps explained by the high proportion of respondents staying in hotels or lodges (25%).

The total spend was seen to be lower in the Summer months compared to other months. This is possibly explained by the warmer weather which led visitors to participate in more 'free' outdoor activities such as walking or cycling.

## 4.6 Activities Undertaken

### 4.6.1 All Activities Undertaken

Question 8 asked people to state which activities they had undertaken during their trip to Pembrokeshire. Multiple answers were given.

Table Q8a: All activities undertaken

	Total %	Summer %	Autumn %	Winter %	Spring %
Eating and drinking out	65%	76%	22%	27%	85%
Short walk (up to 2 hours)	62%	84%	43%	27%	51%
Visiting natural attractions (e.g. coastline, countryside, islands, nature reserves etc.)	59%	57%	57%	56%	64%
Shopping (e.g. arts, crafts, local produce)	57%	57%	30%	31%	82%
Passive beach activities (sunbathing, picnic)	50%	68%	16%	19%	54%
Driving around and sightseeing from car	47%	56%	40%	31%	46%
Visiting historic, heritage & cultural sites (i.e. castles, galleries, churches & craft centres etc.)	33%	50%	16%	8%	27%
Visiting family/theme park or activities park	27%	20%	57%	44%	16%
Active beach activities (games, swimming)	23%	38%	5%	2%	20%
Wildlife watching (e.g. bird watching, dolphin watching)	17%	28%	12%	5%	10%
Long walk (over 2 hours)	16%	21%	6%	5%	17%
Visiting friends or relatives	15%	14%	18%	23%	10%
Boat trips (e.g. wildlife trips)	14%	28%	2%	0%	6%
Visiting gardens/garden centres	13%	19%	15%	2%	7%
Attending an event/show/festival (e.g. food market, concert, surfing competition)	7%	13%	3%	2%	2%
Fishing	5%	8%	0%	2%	3%
Water sports (sailing, wind surfing, water skiing)	3%	4%	0%	2%	5%
Horse riding	3%	4%	8%	0%	1%
Golf	3%	4%	3%	2%	2%
Mountain biking/cycling	3%	3%	5%	0%	4%
None	0%	1%	0%	0%	1%
Other	9%	7%	12%	23%	4%
<b>Multiple Responses Total</b>	<b>532%</b>	<b>660%</b>	<b>370%</b>	<b>311%</b>	<b>517%</b>
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

A range of activities were undertaken by TGA visitors during their stay. On average TGA visitors took part in about five activities (532%).

The most popular activities undertaken included eating and drinking out (65%), short walks (62%), visiting natural attractions (59%) and shopping (57%). A full list of other answers can be found in appendix 3.

Overall, only small differences can be noticed between the TGA results and the Pembrokeshire results overall. TGA visitors appear to undertake slightly less activities (about five activities) than all Pembrokeshire visitors (about six activities). Therefore the proportion of some activities amongst all Pembrokeshire visitors is higher (active beach activities, long walks and visiting historic sites) compared to TGA visitors.



Outdoor activities such as short walks, long walks and beach activities were seen to be more popular during the warmer months of the Summer and Spring period.

Unsurprisingly the colder Winter and Autumn months' results showed a lower number of activities participated in than the Summer and Spring. One reason for this may relate to a higher proportion of short break visitors i.e. 4 nights or under and day visitors. For example the results show that the proportion of visitors going on a short walk in Autumn (43%) and Winter (27%) was lower than Summer (84%) and Spring (51%).

One of the few activities that was more popular in the Autumn (57%) and Winter (44%) seasons was visiting family or theme parks.

## 4.6.2 Main Activities undertaken

TableQ8b: Main Activities undertaken

	Total %	Summer %	Autumn %	Winter %	Spring %
Visiting natural attractions (e.g. coastline, countryside, islands, nature reserves etc.)	23%	19%	21%	25%	30%
Passive beach activities (sunbathing, picnic)	13%	20%	2%	0%	13%
Visiting family/theme park or activities park	12%	2%	40%	28%	5%
Driving around and sightseeing from car	7%	11%	3%	2%	7%
Shopping (e.g. arts, crafts, local produce)	7%	2%	3%	3%	17%
Short walk (up to 2 hours)	7%	11%	3%	2%	4%
Visiting friends or relatives	6%	4%	13%	16%	3%
Eating and drinking out	4%	5%	0%	5%	5%
Active beach activities (games, swimming)	4%	8%	0%	2%	1%
Visiting historic, heritage & cultural sites (i.e. castles, galleries, churches & craft centres etc.)	2%	4%	0%	2%	1%
Long walk (over 2 hours)	2%	3%	0%	0%	2%
Water sports (sailing, wind surfing, water skiing)	1%	1%	0%	0%	2%
Attending an event/show/festival (e.g. food market, concert, surfing competition)	1%	1%	2%	0%	0%
Golf	1%	0%	0%	0%	2%
Horse riding	0%	0%	3%	0%	0%
Wildlife watching (e.g. bird watching, dolphin watching)	0%	1%	0%	0%	1%
Boat trips (e.g. wildlife trips)	0%	1%	0%	0%	0%
Fishing	0%	1%	0%	0%	0%
Visiting gardens/garden centres	0%	0%	0%	0%	0%
Mountain biking/cycling	0%	0%	0%	0%	0%
None	1%	2%	0%	0%	1%
Other	7%	6%	10%	17%	4%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

Visitors were further asked for the main activity they undertook whilst visiting Pembrokeshire/TGA.

The most popular main activity for visitors was visiting natural attractions (23%). The second most popular main activity was passive beach activities with 13% of respondents participating in this activity, followed by visiting family/theme park or activities park (12%).

Appendix 3, page 55, gives a list of other activities mentioned by respondents.

Unsurprisingly, a higher proportion of TGA visitors said that their main activity was passive beach activities (13%) compared to 8% of all Pembrokeshire visitors.

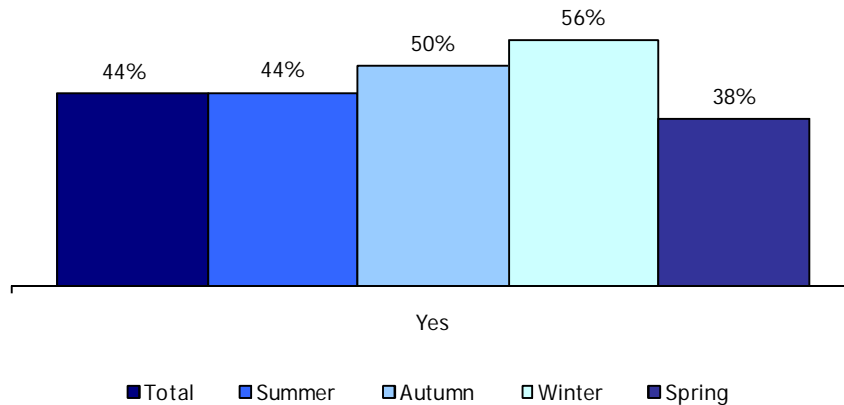
Visiting theme parks was the most popular main activity given in the Autumn (40%) and Winter (28%) months in contrast to their relative lack of importance for Summer (2%) and Spring (5%) visitors.

Perhaps unsurprisingly visitors in Summer (20%) and Spring (13%) were more likely to view passive beach activities as a main activity than those in Autumn (2%) and Winter (0%).

### 4.6.3 Usage of Coastal Path

Those who had participated in a walking activity were asked if they had used or were going to use The Coastal Path. The results are illustrated by the chart below where comparisons can be made between the four quarters.

**Chart Q9a: Usage of 'The Coastal Path'**



Base: Total 309; Summer 187; Autumn 30; Winter 18; Spring 74

A higher proportion of Winter visitors (56%) used or were going to use The Coastal Path compared to visitors in other seasons. However, this may be partly due to the low base.

Overall, a lower proportion of TGA visitors used 'The Coastal Path' (44%) compared to all Pembrokeshire visitors (58%).

#### 4.6.4 Towns/Areas Visited

Respondents were asked which towns or areas they had visited or were going to visit during their time in Pembrokeshire. Multiple responses were possible.

Table Q10: Towns/Areas visited

	Total %	Summer %	Autumn %	Winter %	Spring %
Tenby	89%	87%	82%	81%	96%
Saundersfoot	42%	55%	19%	13%	47%
Pembroke	21%	34%	12%	9%	10%
St. Davids	20%	28%	16%	11%	12%
Haverfordwest	19%	27%	8%	6%	19%
Narberth	14%	20%	9%	9%	10%
Fishguard	11%	14%	3%	6%	13%
Manorbier	8%	14%	6%	2%	0%
Milford Haven	6%	9%	2%	3%	4%
Newgale	5%	8%	5%	6%	1%
Amroth	5%	6%	9%	0%	5%
Kilgetty	4%	2%	23%	22%	0%
Newport	3%	2%	8%	2%	3%
Dale	3%	5%	0%	3%	1%
Carew	3%	5%	0%	0%	1%
Penally	2%	3%	2%	0%	0%
St Florence	2%	3%	0%	0%	0%
Bosherston	1%	1%	0%	0%	0%
Freshwater East	1%	1%	0%	0%	1%
Solva	1%	1%	0%	0%	0%
Broad Haven	0%	1%	0%	0%	0%
Broadhaven South	0%	0%	0%	0%	0%
Freshwater West	0%	0%	0%	0%	0%
Cardigan	0%	0%	0%	0%	0%
Lamphey	0%	0%	0%	0%	0%
Pembroke Dock	0%	0%	0%	0%	0%
Other	7%	9%	24%	5%	7%
<b>Total</b>	<b>268%</b>	<b>326%</b>	<b>227%</b>	<b>178%</b>	<b>219%</b>

The results show that the most frequently visited destination was Tenby with over nine tenths of visitors visiting it (89%). This was followed by Saundersfoot (42%), Pembroke (21%), St. Davids (20%) and Haverfordwest (19%).

A full list can be found in Appendix 3, page 56, including all of the 'other' answers.

Tenby remained the most commonly visited town throughout all seasons. Others varied in popularity from quarter to quarter, for example Saundersfoot was popular in Summer (55%) and Spring (47%) but less so in Autumn (19%) and Winter (13%). Equally Kilgetty was popular in Autumn (23%) and Winter (22%) but not in Summer (2%) and Spring (0%).

Summer visitors visited more places than in other quarters (326%). Reasons for these increases may relate to a number of factors such as weather, type of visitor, length of stay and activities undertaken e.g. higher proportion of walkers and people visiting the beach during this quarter.

Unsurprisingly, the proportion of those that stated they had visited Tenby amongst TGA visitors was significantly higher, at 89%, than amongst all Pembrokeshire visitors, at 49%. However Tenby remains the town that was most often visited by both types of respondents.

## 4.7 Motivations for Visiting

### 4.7.1 Sources of Information

Table Q3 below illustrates the sources of information that influenced respondents' decision to visit Pembrokeshire. Multiple responses were possible.

Table Q3: Influential information sources

	Total %	Summer %	Autumn %	Winter %	Spring %
Previous experience/local knowledge	69%	62%	64%	77%	79%
Recommendation/word of mouth	15%	13%	28%	31%	4%
Website/Internet search	9%	12%	9%	9%	4%
Pembrokeshire Holiday Guide	3%	1%	9%	0%	5%
Visit Wales Brochure	2%	1%	6%	2%	2%
Tour operator/organised package	2%	2%	0%	0%	5%
Other Holiday Guide	1%	3%	0%	0%	0%
Tourist Information Centre	1%	0%	4%	2%	0%
Newspaper/magazine article/advert	1%	1%	0%	2%	0%
Specialist activity magazines	0%	1%	1%	0%	0%
Self-catering/Cottage agency	0%	1%	0%	0%	0%
TV/Radio programme	0%	1%	0%	0%	0%
Guidebook/directory	0%	1%	0%	0%	0%
None	5%	9%	0%	0%	1%
Other	4%	4%	4%	2%	4%
<b>Multiple Responses Total</b>	<b>113%</b>	<b>112%</b>	<b>126%</b>	<b>125%</b>	<b>106%</b>
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

The most popular source of information that influenced the decision was previous experience, which was mentioned by over two thirds of visitors (69%), which does not come as a surprise given that 85% of visitors were repeat visitors.

Recommendations/word of mouth influenced around a sixth (15%) of visitors. Other popular sources included a website or internet search (9%). A full list of other answers can be found in Appendix 3, page 53.

Results show that the proportion of visitors influenced by previous experience as a source of information was higher for Spring (79%) and Winter (77%) than it was for Autumn (64%) and Summer (62%).

Recommendations and word of mouth influenced a higher proportion of respondents in Winter (31%) and Autumn (28%) compared to Summer (13%) and Spring (4%) quarters.

Cross-tabulations by type of visitors do highlight some key variations between types of visitors:

- A higher proportion of day visitors (78%) sourced previous experience/knowledge compared to those staying overnight in Pembrokeshire (66%).

- A higher proportion of first-time visitors (26%) sourced the internet compared to repeat visitors (6%).

A higher proportion of TGA visitors visited because of their previous experience and local knowledge (69%), compared to all Pembrokeshire visitors (60%). Amongst all Pembrokeshire visitors, website/ internet search featured slightly higher (14%) as a source of information than TGA visitors (9%), who were more likely to rely on recommendation / word of mouth (15%).

#### 4.7.2 Reason for Visit

Question 2 results provided multiple response answers.

Table Q2a: All reasons for visiting Pembrokeshire

	Total %	Summer %	Autumn %	Winter %	Spring %
Because we have been before	68%	71%	58%	66%	72%
Because of the physical coastline/countryside/scenery/landscape	51%	52%	27%	17%	76%
Because of the atmospheric characteristics (e.g. peaceful, quiet, tranquil, relaxing)	36%	28%	22%	14%	67%
Because of the award winning beaches / high quality bathing water	27%	26%	5%	11%	47%
Because of its convenient location/easy to get to	18%	18%	9%	3%	30%
To visit family and friends / a second home, free accommodation	16%	21%	15%	11%	10%
Because it was recommended/word of mouth	14%	19%	21%	9%	5%
To visit the Pembrokeshire Coast National Park	13%	20%	0%	0%	14%
To visit a specific place/attraction/ Island etc.	11%	5%	31%	30%	0%
To experience Welsh culture and heritage	9%	7%	10%	5%	15%
To undertake a specific activity (e.g. walking, cycling)	6%	6%	6%	8%	5%
To experience the local food and produce	5%	6%	6%	6%	2%
Because of an event or show	3%	3%	6%	5%	1%
By chance/because an opportunity presented itself (e.g. advert, offer in window, magazine, internet)	1%	1%	1%	0%	1%
A special offer	1%	0%	5%	0%	0%
Other	8%	10%	9%	6%	7%
<b>Multiple Responses Total</b>	<b>288%</b>	<b>293%</b>	<b>233%</b>	<b>191%</b>	<b>353%</b>
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

When asked to specify which factors had influenced their decision to visit Pembrokeshire, two thirds of visitors stated that they had visited because they had been before (68%).

Over half (51%) of respondents visited because of the physical landscape such as the coastline/countryside/scenery/landscape. One third of visitors came because of the atmospheric characteristics (peaceful, quiet, tranquil and relaxing) (36%). Over a quarter came because of the award winning beaches/high quality bathing water (27%).

A number of seasonal variations can be noticed. Visitors in Spring (76%) and Summer (52%) were much more likely to come because of the physical scenery of Pembrokeshire than those in Autumn (27%) and Winter (17%), possibly because they were more likely to be participating in outdoor activities.

Those in Autumn (31%) and Winter (30%) were much more likely to visit because of a specific attraction compared to the Summer (5%) and Spring (0%) quarters.

These elements can be considered key product strengths of the area. A full list of other responses can be found in Appendix 3, page 52.

Table Q2b: Main Reason for visiting Pembrokeshire

	Total %	Summer %	Autumn %	Winter %	Spring %
Because we have been before	26%	32%	15%	39%	18%
Because of the physical coastline/countryside/scenery/landscape	18%	20%	7%	5%	24%
To visit family and friends / a second home, free accommodation	11%	14%	12%	9%	7%
To visit a specific place/attraction/ Island etc.	7%	1%	25%	30%	0%
Because of the atmospheric characteristics (e.g. peaceful, quiet, tranquil, relaxing)	7%	3%	4%	0%	18%
Because it was recommended/word of mouth	5%	7%	4%	6%	3%
Because of its convenient location/easy to get to	5%	3%	4%	3%	11%
Because of the award winning beaches / high quality bathing water	4%	3%	1%	2%	7%
To undertake a specific activity (e.g. walking, cycling)	3%	2%	3%	0%	1%
Because of an event or show	2%	2%	4%	3%	1%
To experience Welsh culture and heritage	1%	1%	3%	0%	2%
To visit the Pembrokeshire Coast National Park	1%	3%	0%	0%	1%
To experience the local food and produce	1%	2%	0%	2%	0%
By chance/because an opportunity presented itself (e.g. advert, offer in window, magazine, internet)	1%	1%	3%	0%	1%
A special offer	0%	0%	3%	0%	0%
Other	5%	7%	9%	2%	5%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

The table above illustrates respondents' main reason for visiting Pembrokeshire.

Over a quarter of visitors stated that the main reason for visiting was because they had been before (26%).

Additional popular reasons for visiting Pembrokeshire were because of the physical coastline/countryside/scenery/landscape (18%) and to visit friends and family (11%).

Seasonal variations include:

- Summer and Spring respondents were more likely to give their main reason as because of the physical scenery and landscape and those from Autumn and Winter were more likely to give a specific attraction as their main reason.
- Visitors in Spring (18%) were more likely to give the atmospheric characteristics of Pembrokeshire as the main reason compared to any other quarter.

There were no major variations when comparing the results for the TGA area with the Pembrokeshire results overall. The two aspects most frequently mentioned were because we have been before (22% for Pembrokeshire overall and 26% for the TGA results) and because of the

physical coastline/ countryside/ scenery and landscape (15% for Pembrokeshire and 18% for the TGA results).

## 4.8 Experience of visit

### 4.8.1 Importance/Performance Analysis

An important part of evaluating the visitor experience is to identify key factors which the visitor considers central to the enjoyment of holiday locations in general, and then to measure the rating of those key factors in Pembrokeshire.

Table Q4: Important Factors to enjoy a holiday

	Total Mean	Summer Mean	Autumn Mean	Winter Mean	Spring Mean
Award winning beaches	4.29	4.48	2.63	4.93	4.69
A range of natural attractions to visit (e.g. the National Park, the Islands, nature reserves, woodlands)	4.11	4.04	3.78	5.00	4.17
Opportunities for walking	4.03	4.12	3.21	4.92	4.14
Excellent eating-out experiences (e.g. restaurants, cafes etc)	3.97	3.94	2.73	4.89	4.47
A diverse range of outdoor activities	3.93	3.59	3.83	5.00	4.12
Facilities that are open all year round	3.91	3.05	4.65	5.00	4.26
High quality cultural, heritage and historic sites	3.54	3.65	2.31	4.73	3.94
Family-friendly places to visit (e.g. attractions & theme parks)	3.50	3.37	3.73	5.00	3.06
Environmentally-friendly services and facilities e.g. local produce, coastal buses, cycling tracks	3.13	3.16	2.06	5.00	3.51
High quality gardens & garden centres	2.63	2.73	2.14	4.43	2.65
Lively nightlife	1.56	1.58	1.14	4.71	1.61
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

As the table above illustrates, the aspect that scored highest in terms of importance was 'award winning beaches' (4.29 mean), followed by 'a range of natural attractions to visit' (4.11 mean), 'opportunities for walking' (4.03 mean) and 'excellent eating out experiences' (3.97 mean).

The least important factor for visitors was 'lively nightlife' (1.56 mean).

Again the TGA results are in line with the overall Pembrokeshire results, with the top four most important factors being rated the same (award winning beaches, a range of natural attractions, opportunities for walking and excellent eating-out experiences).

However, TGA visitors places slightly more emphasis on having facilities that are open all year round (3.91 mean compared to 3.70 mean amongst all Pembrokeshire visitors) and a diverse range of outdoor facilities (3.93 mean compared to 3.70 mean amongst all Pembrokeshire visitors).



Table Q5: Performance of Pembrokeshire

	Total Mean	Summer Mean	Autumn Mean	Winter Mean	Spring Mean
Award winning beaches	4.80	4.85	4.56	4.93	4.75
Opportunities for walking	4.71	4.74	4.72	4.83	4.65
A range of natural attractions to visit (e.g. the National Park, the Islands, nature reserves, woodlands)	4.60	4.58	4.73	5.00	4.49
High quality cultural, heritage and historic sites	4.40	4.40	4.54	4.70	4.34
A diverse range of outdoor activities	4.29	4.27	4.27	4.91	4.13
Family-friendly places to visit (e.g. attractions & theme parks)	4.25	4.31	4.22	4.98	3.85
Excellent eating-out experiences (e.g. restaurants, cafes etc)	4.04	3.98	4.27	4.56	3.95
Facilities that are open all year round	4.02	3.62	4.81	4.85	3.72
Environmentally-friendly services and facilities e.g. local produce, coastal buses, cycling tracks	3.80	3.69	4.14	4.38	3.86
High quality gardens & garden centres	3.59	3.49	4.08	4.00	3.60
Lively nightlife	2.30	2.49	1.60	4.71	1.89
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

The aspect that scored highest in terms of performance was 'award winning beaches' (4.80 mean), followed by 'opportunities for walking' (4.71 mean) and 'a range of natural attractions to visit' (4.60 mean).

The aspect that scored lowest for performance was 'lively nightlife' (2.30 mean).

When comparing the TGA performance scores with Pembrokeshire's performance scores, the order of the performance scores matches are ranked the same for both sets of results. Similar performance scores were given.

Interestingly Winter visitors gave higher scores than other quarters in almost all of the categories, and this may have been influenced by the high number of regular repeat visitors who already have a strong affinity with the area.

## Gap Analysis

A gap analysis provides a comparison of Importance scores with Performance Satisfaction scores. This analysis allows us to identify the perceived priorities for improvements to Pembrokeshire.

Table Q4\_5: Difference between Importance/Performance Scores for Pembrokeshire

	Total Gap Analysis	Summer Gap Analysis	Autumn Gap Analysis	Winter Gap Analysis	Spring Gap Analysis
High quality gardens & garden centres	0.96	0.76	1.94	-0.02	-0.35
High quality cultural, heritage and historic sites	0.86	0.75	2.23	-0.03	0.31
Family-friendly places to visit (e.g. attractions & theme parks)	0.75	0.94	0.49	-0.15	1.74
Lively nightlife	0.74	0.91	0.46	0	1.99
Opportunities for walking	0.68	0.62	1.51	-0.33	0.15
Environmentally-friendly services and facilities	0.67	0.53	2.08	0	0.89
Award winning beaches	0.51	0.37	1.93	-0.43	-0.67
A range of natural attractions to visit	0.49	0.54	0.96	0	0.43
A diverse range of outdoor activities	0.37	0.68	0.44	-0.09	-0.33
Facilities that are open all year round	0.11	0.57	0.16	-0.09	-0.22
Excellent eating-out experiences (e.g. restaurants, cafes etc)	0.07	0.04	1.54	-0.63	0.24
<b>Base</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>

The table above shows the areas in which Pembrokeshire is under-performing or over-performing. Within this table it is important to take into account the level of **importance score against the gap analysis figures**.

These results suggest that Pembrokeshire is exceeding expectations in all of the categories, in particular 'high quality gardens and garden centres' (0.96 mean), 'high quality cultural, heritage and historic sights' (0.86 mean), 'family-friendly places to visit' (0.75 mean), and 'lively nightlife' (0.74 mean). However these results are influenced by the fact that all of these categories were rated comparatively lowly in terms of importance.

Areas which were identified to be underperforming included facilities that were open all year round, excellent eating out experiences, a diverse range of outdoor activities and award winning beaches. Negative scores were achieved for each of these facilities during Winter and Spring.

The gap analysis generally shows more negative results for the Winter quarter period in comparison with other quarters, despite having given highest marks for performance. However, as shown in the importance scores, these Winter visitors tended to have higher expectations of their holiday experience compared to other quarters. The cold weather may also have had an impact on their ability to enjoy some activities, such as the award winning beaches which is why this category has such a large negative score (-0.43 mean).

In line with the overall results for Pembrokeshire, results identified the opening hours of tourism businesses all year round and eating out experiences as two key areas for improvement for consideration.

Outdoor activities and award winning beaches during the Winter were also rated below visitor expectations.

#### 4.8.2 Usage and Rating of Various Elements

Respondents were asked which of the following elements they had used during their visit to Pembrokeshire.

Table Q16a: Usage of different elements

	Total Used %	Summer Used %	Autumn Used %	Winter Used %	Spring Used %
General level of litter & cleanliness	94%	95%	93%	89%	94%
Car parking facilities	80%	86%	88%	92%	55%
Cleanliness of beaches	79%	94%	34%	47%	90%
Signposts/Brown signage	67%	72%	79%	69%	47%
Availability of public toilets	67%	77%	49%	55%	63%
Cleanliness of public toilets	62%	77%	46%	31%	59%
Information display boards	47%	49%	46%	31%	47%
Tourist Information Centres	37%	41%	24%	17%	43%
Public transport	12%	16%	7%	2%	13%
<b>Base</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>

Overall 94% of all visitors had made use of the litter facilities, followed by 80% who had used the car parking facilities. 12% had used public transport.

No major variations on usage levels were seen between the TGA area results and the overall Pembrokeshire results. Only a slightly higher proportion of all Pembrokeshire visitors had used the car parking facilities (85%), signposts (76%) and public toilets (74%) compared to TGA visitors (80%, 67% and 67% respectively).

Respondents who had used a specific facility were asked how they would rate the provision of that facility within the Pembrokeshire area on a scale form 1 to 5, with 1 being very poor and 5 being very good. The mean values are provided in the table below.

Table Q16b: Rating of different elements

	Total Mean	Summer Mean	Autumn Mean	Winter Mean	Spring Mean
Cleanliness of beaches	4.45	4.66	3.83	4.79	4.13
General level of litter & cleanliness	4.30	4.41	4.15	4.58	4.08
Signposts/Brown signage	4.14	4.21	4.21	4.07	3.98
Tourist Information Centres	4.14	4.15	4.44	4.44	4.00
Information display boards	4.08	4.01	4.29	4.63	3.92
Cleanliness of public toilets	3.97	3.90	4.32	4.45	3.87
Car Parking facilities	3.96	3.89	4.15	4.49	3.57
Availability of public toilets	3.88	3.89	4.27	4.29	3.55
Public transport	3.66	3.77	2.60	4.00	3.71
<b>Base</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>	<b>Variable</b>

The aspect that received the best overall ratings was the cleanliness of beaches (4.45 mean), followed by the general level of litter and cleanliness (4.30 mean). Other favourable ratings included signposts/signage (4.14 mean) and Tourist Information Centres (4.14 mean).

All of the aspects were rated as at least fair, although public transport (3.66 mean), availability of public toilets (3.88) and car parking facilities (3.96 mean) had the most scope for improvement. Unsurprisingly some elements such as the beaches were more likely to be used in Summer and Spring than Autumn and Winter.

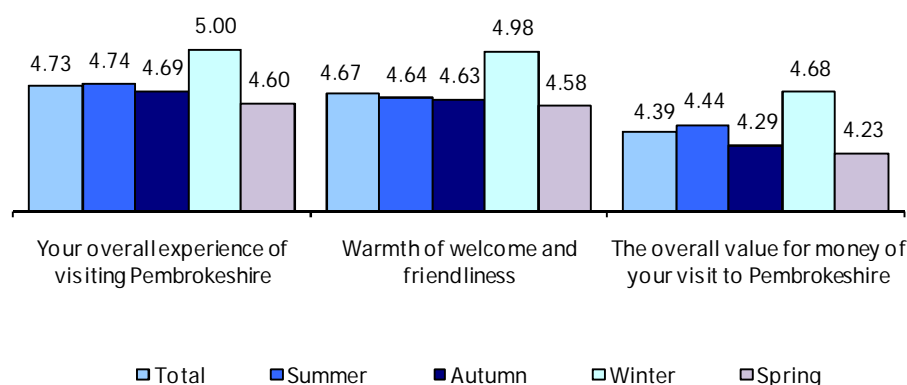
Autumn visitors gave lower ratings for both the cleanliness of beaches and public transport, however this may have been influenced by the low number that had used them. The availability of public toilets was rated more highly for the Autumn (4.27 mean) and Winter (4.29) mean) quarters, possibly because there were fewer crowds. Information display boards were rated more highly in Winter (4.63) than in any other quarter.

Results show that key areas for improvement in the TGA area were car parking facilities, availability of public toilets and public transport.

No major variations were seen between the ratings of the TGA area and the Pembrokeshire area as a whole.

### 4.8.3 Comparison with other UK Destinations

**Chart Q17: Rating of Pembrokeshire compared to other UK destinations**



Base: Total 481; Summer 215; Autumn 67; Winter 64; Spring 135

Respondents were also asked to rate various aspects of their visit to Pembrokeshire compared to other UK destinations on a scale from 1 to 5, with 1 being very poor and 5 being very good. The mean results are shown in the chart above.

Visitors' 'overall experience of visiting Pembrokeshire' received the highest mean scores (4.73 mean), this was followed by 'warmth of welcome and friendliness' (4.67 mean).

The lowest mean scores (but still 'good' mean scores above 4.00) were given to 'the overall value for money of your visit to Pembrokeshire' (4.39 mean).

Winter respondents generally gave higher scores compared to other quarters. Spring respondents gave lower scores than other quarters.

Positively all aspects scored 'good' or 'very good' in all quarters compared to other UK destinations.

The TGA results reflect similar patterns to the overall Pembrokeshire results, with highest values being given to the overall experience of visiting Pembrokeshire, followed by warmth of welcome and value for money.

#### 4.8.4 Aspects most enjoyed during visit to Pembrokeshire

Table Q18: Aspects most enjoyed during visits to Pembrokeshire

	Total %	Summer %	Autumn %	Winter %	Spring %
Physical scenery, coastline, landscape, marina, wildlife	33%	35%	38%	14%	38%
Atmospheric characteristics e.g. peaceful, tranquility, rest, relaxation	20%	13%	28%	27%	22%
Beaches	16%	25%	0%	2%	15%
Visiting/being with friends and family	8%	4%	30%	16%	1%
Weather	7%	8%	13%	5%	4%
Everything / generally being in Pembrokeshire	6%	7%	5%	14%	3%
Places of interest e.g. St Davids, Castell Henllys	5%	7%	3%	3%	5%
Walking	5%	5%	3%	2%	7%
Shopping	3%	4%	2%	0%	4%
Folly Farm	2%	1%	3%	6%	2%
Welsh culture / Pembrokeshire People	2%	2%	0%	2%	2%
Watching the sea, boats, ships	2%	3%	0%	0%	1%
Physical Activity	2%	0%	0%	5%	2%
Pubs / hotels	2%	0%	0%	2%	5%
Castles	1%	3%	0%	0%	1%
Convenient location / easy to get to	1%	2%	2%	0%	0%
Pembroke Castle	0%	1%	2%	0%	0%
Motorcycling	0%	1%	0%	0%	0%
Sailing	0%	1%	0%	0%	0%
Fishing	0%	1%	0%	0%	0%
Cycling	0%	0%	0%	0%	0%
Other	1%	0%	0%	3%	1%
Don't know/ Can't say	9%	9%	8%	11%	7%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

When asked which aspects they had enjoyed most during their visit to Pembrokeshire, the largest proportion of respondents felt that they had enjoyed the physical scenery and coastline the most (33%).

One fifth of visitors enjoyed the atmospheric characteristics (20%) and one sixth (16%) enjoyed the beaches.

Visitors in Autumn (30%) and Winter (16%) were more likely to enjoy visiting friends and family the most than Summer (4%) and Spring (1%) visitors. Winter visitors were the least likely to have enjoyed the physical scenery the most (14%) perhaps influenced by the colder weather and less participation in outdoor activities.

There were no significant variations when comparing the TGA results with the overall Pembrokeshire results. However, during the Winter quarter a lower proportion of TGA visitors stated that they had enjoyed the physical scenery the most (14%) compared to 22% of all Pembrokeshire visitors.

#### 4.8.5 Aspects least enjoyed during visit to Pembrokeshire

Table Q19: Aspects least enjoyed during visit to Pembrokeshire

	Total %	Summer %	Autumn %	Winter %	Spring %
Nothing / DK	80%	72%	82%	88%	91%
Poor weather	9%	15%	0%	6%	4%
High costs e.g. campsite, food outlets	2%	2%	3%	0%	1%
Dogs in areas / Dog mess	2%	4%	0%	0%	0%
Poor service with accommodation	1%	0%	6%	0%	1%
Poor services with food outlets e.g. waiting, quality of food	1%	1%	3%	0%	1%
Lack of parking	1%	2%	0%	0%	0%
High cost of car park	1%	1%	1%	0%	0%
Lack of toilets	1%	0%	4%	0%	0%
Unfriendly people	1%	1%	0%	0%	0%
Insufficient opening hours	0%	0%	0%	3%	0%
High cost of entrance to attractions	0%	0%	0%	3%	0%
Traffic Jams	0%	0%	0%	0%	0%
Footpath eroded	0%	0%	0%	0%	0%
Market has closed	0%	0%	0%	0%	0%
Other	1%	1%	1%	0%	1%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

Positively, when asked which aspects they enjoyed the least, 80% gave a 'nothing/don't know' response when asked for the least enjoyable aspect of their visit.

Under a tenth (9%) of visitors stated that the poor weather was the least enjoyable aspect of their visit.

Other aspects that adversely affected the experience of respondents' visit to Pembrokeshire were:

- High costs (2%)
- Dogs in area / dog mess (2%)

Interestingly Summer visitors had the highest percentage of people who enjoyed the weather the least, probably influenced by the extremely bad weather the UK received in the summer of 2007.

No major variations were seen between the TGA visitor results and the overall Pembrokeshire results with regard to the aspects that were least enjoyed. However, during the Summer quarter a higher proportion of TGA visitors mentioned poor weather (15%) compared to all Pembrokeshire visitors (9%).

#### 4.8.6 Improvement suggestions

Table Q20: Improvement Suggestions

	Total %	Summer %	Autumn %	Winter %	Spring %
Nothing	54%	55%	57%	53%	53%
Keep everything as it is	5%	4%	10%	8%	4%
More toilets	5%	4%	1%	2%	10%
Improve cleanliness	4%	0%	13%	2%	4%
More car parking	3%	5%	0%	0%	4%
The weather	3%	1%	4%	13%	0%
Reduce costs/ better value e.g. activities, fishing, eating out	3%	2%	3%	6%	2%
Better eateries / shopping provision	2%	2%	1%	0%	4%
Improve public transport	2%	2%	0%	0%	4%
Ban dogs from beach / get rid of dog mess	2%	3%	0%	2%	0%
Improve road signage / language unable to understand	2%	1%	0%	8%	0%
Improve disabled access	1%	1%	0%	0%	1%
More activities	1%	0%	1%	3%	0%
Keep public toilets clean	1%	1%	0%	2%	0%
Less traffic	1%	0%	0%	0%	1%
More family friendly places	0%	0%	1%	0%	1%
More information e.g. cycling	0%	0%	0%	0%	1%
More friendly people / better service	0%	0%	0%	0%	1%
Better litter/ recycling facilities	0%	0%	0%	2%	0%
Don't know / other	12%	18%	9%	2%	7%
<b>Total</b>	<b>101%</b>	<b>99%</b>	<b>102%</b>	<b>103%</b>	<b>98%</b>
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

When visitors were asked what they would like to see improved in Pembrokeshire, more than half (54%) said 'nothing' and 5% said to keep everything as it is.

Other suggestions for improvement included more toilets (5%), improve cleanliness (4%) and more car parking (3%). Some visitors (5%) suggested that Pembrokeshire should be left as it is.

Autumn visitors in particular felt that cleanliness could be improved compared to visitors in other seasons (13%). Winter respondents were more likely to ask for improved road signage (8%) and improvements to the weather (13%).

In line with previous findings, key areas for improvement revolved around improving public toilets, eating facilities, public transport and car parking facilities.

When comparing results with overall Pembrokeshire results no major variations were seen.

#### 4.8.7 Likelihood of future visits

Respondents were asked how likely they were to visit Pembrokeshire in the next 12 months, and in the next 1 to 5 years. The two tables below illustrate these findings.

Table Q21a: In the next 12 months

	Total %	Summer %	Autumn %	Winter %	Spring %
Very likely	62%	51%	69%	81%	69%
Quite likely	18%	20%	15%	14%	19%
Not very likely	11%	13%	16%	5%	10%
Not at all likely	4%	7%	0%	0%	2%
Don't know	5%	10%	0%	0%	1%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

Table Q21b: In the next 5 years

	Total %	Summer %	Autumn %	Winter %	Spring %
Very likely	66%	69%	75%	86%	48%
Quite likely	18%	20%	18%	14%	17%
Not very likely	2%	3%	5%	0%	1%
Not at all likely	0%	0%	0%	0%	0%
Don't know	14%	8%	3%	0%	34%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

A total 80% of visitors said that they would be either very likely (62%) or quite likely (18%) to visit Pembrokeshire in the next 12 months.

An even higher proportion of respondents (84%) were either very likely (66%) or quite likely (18%) to visit in the next 1 to 5 years.

Winter visitors were much more likely to visit in the next 12 months (95%) and the next five years (100%) than during any other quarter, boosted by the high number of repeat visitors who already come on a regular basis.

Comparisons with the Pembrokeshire visitor results, show that a higher proportion of TGA visitors would consider visiting Pembrokeshire in the next 12 months (80%) compared to all Pembrokeshire visitors (69%).



## 4.9 PR Question

Table Q28: Ideal Walking Buddy in Pembrokeshire

	Total %	Summer %	Autumn %	Winter %	Spring %
Richard Burton (Film Star)	16%	16%	16%	11%	17%
Owain Glyndwr (Prince of Wales 1359-1416)	11%	12%	13%	11%	10%
Dylan Thomas (Poet)	11%	15%	9%	9%	7%
Aled Jones (Singer/Presenter)	11%	13%	7%	6%	12%
Ryan Giggs (Football Player)	10%	9%	10%	14%	10%
Catherine Zeta Jones (Film Star)	10%	9%	10%	8%	10%
Charlotte Church (Singer/Presenter)	9%	10%	13%	16%	3%
Connie Fisher (Singer)	4%	6%	1%	3%	4%
None	9%	12%	3%	22%	2%
<b>Base</b>	<b>481</b>	<b>215</b>	<b>67</b>	<b>64</b>	<b>135</b>

Finally, respondents were asked which of the following famous people would make an ideal 'walking buddy' on a visit to Pembrokeshire.

The top four walking buddies for visitors were Richard Burton (16%), Owain Glyndwr (11%), Dylan Thomas (11%) and Aled Jones (11%).

The findings from this PR question could be used to create an eye-catching headline and interesting copy for a press article to promote the area and the range of walks and beautiful scenery it has to offer to first-time visitors.

## **5. Summary Conclusions and Recommendations**

### **5.1 Profile of visitors**

#### **Mixed profile of visitors**

A broad range of age groups were attracted to the area. About one third of visitors were aged 35 to 54 years (31%), just over a quarter of visitors were aged 15 years and under (26%) and a further third aged 55 years plus (30%). The comparison with the Pembrokeshire results shows that a lower proportion of TGA visitors were aged 25 to 34 years (7%) compared to 20% of all Pembrokeshire visitors.

A mix of visitors from different social grades were also seen, with 23% from A/B social grades, 38% from C1, 24% from C2 and 14% from D/E social grades. TGA area visitors were slightly less likely to belong to higher social grades A/B (23%) compared to all Pembrokeshire visitors (30%). On the contrary a higher proportion of TGA visitors belonged to the mid-social grades C1/C2 (62%) compared to 53% of all Pembrokeshire visitors.

A large proportion of visitors were staying visitors in overnight accommodation within Pembrokeshire (59%). A further quarter of visitors were on a day trip from their home over three hours (28%). The results reflect the overall Pembrokeshire results.

A total 62% of TGA visitors came without children, although there were significant seasonal variations. This compares to 61% of all Pembrokeshire visitors.

#### **Consistent level of repeat visitors**

The high proportion of repeat visitors to the area (85%) demonstrates the loyal base of customers the TGA area attracts. The results are in line with the overall Pembrokeshire results, in which 17% of all visitors were first-time visitors. Consideration however may want to be given to attract more first-time visitors to the area.

#### **High proportion of Welsh based visitors**

Overall results show that over half of visitors to Pembrokeshire were from Wales (59%). Visitors outside of Wales predominately came from regions bordering Wales, including the West Midlands (12%) and the North West (8%). Only a small proportion of visitors were from overseas (3%). Further investigations may want to be made to attract more overseas visitors to the area.

When comparing the TGA area results (58%) with the overall Pembrokeshire survey findings (50%), a slightly higher proportion of visitors come from Wales. A slightly lower proportion come from the South West (4%) compared to the overall Pembrokeshire survey findings (8%).

#### **Reasonable proportion of dogs**

In total one in ten of the staying visitors (10%) had brought a dog on holiday with them compared to 13% of all Pembrokeshire visitors.

### **5.2 Pattern of staying visitors**

#### **Seasonal variations**

Results show that the TGA area attracts a mix of short break (4 nights and under) (38%) and long stay (5 nights plus) (62%) visitors. The average number of nights stayed overnight in

Pembrokeshire in total was 6.53 nights, demonstrating the area's strength as a long stay destination.

In line with the overall Pembrokeshire results, TGA Visitors were more likely to be staying in overnight accommodation during the Summer and Spring (73% and 58%). Visitors in the Summer stayed for significantly longer periods (7.69 nights), and nearly double the length compared to other quarters. These results emphasise Pembrokeshire's strength as a long stay destination during the Summer months.

Shorter breaks were more popular during Winter (72%) and Autumn (57%) quarters compared to the Spring (42%), and Summer (24%) quarters. The proportion of day visitors was higher during Autumn (48%) and Winter (44%) months, reflecting the seasonality of the destination.

### **5.3 Mode of transport**

#### **Car still the main mode of transport to Pembrokeshire**

Overall results show that the car easily remains the main mode of transport used to travel to Pembrokeshire (84%), with 5% using different types of transport. These figures are virtually unchanged since 2004. Results remain in line with overall Pembrokeshire visitor results.

### **5.4 Activities undertaken**

#### **Wide range of outdoor activities undertaken**

The most popular activities undertaken by visitors during their stay included eating and drinking out (65%), short walks (62%), visiting natural attractions (59%), shopping (57%), passive beach activities (50%) and driving around and sightseeing from the car (47%). Visiting theme/activities parks, and visiting friends and relatives, were higher during Autumn and Winter.

Overall, only small differences can be noticed between the TGA results and the Pembrokeshire results overall. TGA visitors appear to undertake slightly less activities (about five activities) than all Pembrokeshire visitors (about six activities). Therefore the proportion of some activities amongst all Pembrokeshire visitors is higher (active beach activities, long walks and visiting historic sites) compared to TGA visitors.

Unsurprisingly, a higher proportion of TGA visitors said that their main activity was passive beach activities, at 13%, compared to 8% of all Pembrokeshire visitors.

#### **High usage of 'The Coastal Path'**

Almost half of walking visitors had used, or were going to use, 'The Coastal Path' (44%), compared to a slightly higher proportion of all Pembrokeshire visitors (58%).

#### **Wide dispersal of visitors within the TGA area**

Visitors were shown to have visited a wide range of towns throughout the County. The top ten towns visited included Tenby (89%), Saundersfoot (42%), Pembroke (21%), St. Davids (20%), Haverfordwest (19%), Narberth (14%) and Fishguard (11%).

Unsurprisingly, the proportion of those that stated they had visited Tenby amongst TGA visitors was significantly higher, at 89%, than amongst all Pembrokeshire visitors, at 49%. However Tenby remains the town that was most often visited by both types of respondents.

## **5.5 Motivations for visiting**

### **Previous experience, recommendation and website remain main sources of information**

In terms of sources of information used, previous experience (69%), recommendations/word of mouth (15%) and website/internet search (9%) were cited as the most popular in influencing decision making. A higher proportion of first-time visitors (26%) sourced the internet compared to repeat visitors (6%). The results reflect the overall Pembrokeshire visitor results. Only a smaller proportion of TGA visitors were seen to use the website/internet (9%) compared to the overall Pembrokeshire results (14%).

### **Advanced bookings made**

Just under half of visitors (44%) booked their accommodation three months or more in advance in 2008, compared to 38% of all Pembrokeshire visitors.

### **Influencing factors based on experience and natural attractions**

The most commonly given reason for visiting Pembrokeshire was having visited previously (68%). Other fairly common reasons included because of the scenery and landscape (51%), the atmospheric characteristics (36%) and award winning beaches (27%). These are all elements which can be considered key product strengths of the area.

As with activity findings, a higher proportion of Autumn and Winter visitors were more likely to visit a specific place/attraction/Island (31% and 30% respectively) than those visitors in Summer and Spring (5% and 0% respectively). Results suggest that certain visitors are drawn to the TGA area for different motivational reasons at different times of the year.

There were no major variations when comparing the results for the TGA area with the Pembrokeshire results overall. The two aspects most frequently mentioned were because we have been before (22% for Pembrokeshire overall and 26% for the TGA results) and because of the physical coastline/ countryside/ scenery and landscape (15% for Pembrokeshire and 18% for the TGA results).

## **5.6 Experience of visit**

### **High satisfaction scores achieved**

Overall results show that in line with the overall Pembrokeshire results, high satisfaction ratings were achieved for accommodation provision, facilities, services, warmth of welcome and overall experience. 80% of visitors stated they were likely to visit in the next 12 months and 84% stated they were likely to visit in the next 5 years.

The majority of aspects about Pembrokeshire as a holiday destination received 'positive' rating values overall. Factors that scored highest in terms of performance were 'award winning beaches' (4.80 mean), 'opportunities for walking' (4.71 mean) and 'a range of natural attractions to visit' (4.60 mean). Facilities and services that received the highest ratings were the general level of litter and cleanliness (4.45 mean), cleanliness of beaches (4.30 mean), and signposts/ brown signage (4.14 mean).

Findings however did identify public transport, public toilets and car parking as key areas for improvement, with all facilities being rated as satisfactory to good. Public transport was rated consistently lower throughout the year, particularly during the Autumn period (3.66 mean).

Similar to the overall Pembrokeshire results, facilities that were open all year round and excellent eating out experiences were identified as factors which were underperforming. Both these factors may be considered as key areas for improvement. Negative scores for facilities open all year round were achieved during Winter (0.09) and Spring (-0.22) periods. Encourage businesses to extend their season may help to improve performance scores for Winter visitors and attract more visitors to the area during the off-peak season. As eating out was rated as a key area of importance, consideration therefore could be given to making this a high priority for product development.

Further to this outdoors activities and award winning beaches during the Winter for visitors were rated below visitor expectations. As predominantly an outdoor based destination, consideration may be want to be given to promote off-peak seasonal activity themes such as history and heritage / indoor features which may be less affected by weather conditions.

## 6. Appendices

### Appendix 1: Questionnaire

#### Pembrokeshire Visitor Survey 2007-08

<b>Sub-Areas:</b>	The South (A) The West (B) The North (C)	<b>Name of location:</b> _____ (State town and location)
<b>Type:</b>	City/Large town (1) Small town (2) Village/Countryside (3) Coastal (4)	<b>Date (Month):</b> _____ <b>Time:</b> _____ <b>Length interview:</b> _____ <b>Weather:</b> _____ <b>Interviewer Name:</b> _____

I am from QA Research and we are conducting a visitor survey on behalf of Pembrokeshire County Council, Pembrokeshire National Park Authority and South West Wales Tourism Partnership. We would be grateful if you could spare a few minutes to complete this questionnaire about your trip/visit today. The information you provide will be completely confidential and will help to improve facilities for future visitors.

#### **Q1. Which of the following best describes you? (Circle one response only)**

- |   |    |                          |
|---|----|--------------------------|
| Local resident (within interview location) .....                      | 1  | <b>(close interview)</b> |
| Day trip from your home under 3 hours time spent .....                | 2  | <b>(close interview)</b> |
| Regular shopping trip.....  | 3  | <b>(close interview)</b> |
| Regular place of work.....  | 4  | <b>(close interview)</b> |
| Day trip from your home over 3 hours time spent .....                 | 5  |                          |
| Staying visitor in overnight accommodation within Pembrokeshire.....  | 6  |                          |
| Staying visitors with friends or relatives in Pembrokeshire.....      | 7  |                          |
| Staying visitors from overnight accommodation elsewhere in Wales..... | 8  |                          |
| Staying visitors with friends or relatives elsewhere in Wales.....    | 9  |                          |
| Business visitor in overnight accommodation within Pembrokeshire..... | 10 |                          |
| Business visitor in overnight accommodation elsewhere in Wales.....   | 11 |                          |
| Other (please specify).....   | 12 |                          |

#### **SECTION A: HOLIDAY DECISION MAKING (ASK ALL)**

#### **Q2a. Which of the following reasons influenced your decision to visit Pembrokeshire? (SHOWCARD 1)**

(Circle all responses)

#### **Q2b. Which of the following is your main reason for visiting? (Circle one response)**

	<b>Q2a. All reasons</b>	<b>Q2b. Main reason</b>
1. Because we have been before	1	1
2. Because it was recommended/word of mouth	2	2
3. Because of its convenient location / easy to get to	3	3
4. To visit the Pembrokeshire Coast National Park	4	4
5. Because of the physical coastline / countryside/ scenery / landscape	5	5
6. Because of the award winning beaches / high quality bathing water	6	6
7. Because of the atmospheric characterises e.g. peaceful, quiet, tranquil, relaxing	7	7
8. To undertake a specific activity e.g. walking, cycling	8	8
9. To visit a specific place/ attraction / Island etc Please specify _____	9	9
10. Because of an event or show Please specify _____	10	10
11. To visit family and friends / a second home, free accommodation	11	11
12. To experience the Welsh culture and heritage	12	12
13. To experience the local food and produce	13	13
14. A special offer	14	14
15. By chance / because an opportunity presented itself e.g. advert, offer in window, magazine, internet etc)	15	15
16. Other Please specify _____	16	16

**Q3. What sources of information influenced your decision to visit Pembrokeshire before you arrived here?** (Circle all that apply, please specify from option 4 onwards sources of information used)

- Previous experience / local knowledge 1
- Visit Wales Brochure 2
- Pembrokeshire Holiday Guide 3
- Other holiday guide 4 (pls specify) \_\_\_\_\_
- Specialist activity magazines 5 (pls specify) \_\_\_\_\_
- Tourist Information Centre 6 (pls specify) \_\_\_\_\_
- Recommendation / word of mouth 7 (pls specify) \_\_\_\_\_
- Self-catering / Cottage agency 8 (pls specify) \_\_\_\_\_
- Guidebook / directory 9 (pls specify) \_\_\_\_\_
- Tour operator / organised package 10 (pls specify) \_\_\_\_\_
- TV / Radio programme 11 (pls specify) \_\_\_\_\_
- Newspaper / magazine article/ advert 12 (pls specify) \_\_\_\_\_
- Website / Internet search 13 (pls specify) \_\_\_\_\_
- Other (please specify) 14 \_\_\_\_\_

**Q4. On a scale of 1 to 5 (with 1 being very unimportant and 5 being very important), how important are each of the following aspects to your holiday? (SHOWCARD 2)** (Please score in number, only put a 6 if don't know/can't say)

**Q5. In your experience on this holiday, how do you rate Pembrokeshire on the following? (With 1 being very poor 5 being very good) (SHOWCARD 2)** (Please score in number, only put a 6 if don't know/can't say)

	Q4 Important score	Q5. Perceptions/ Experience score
1. High quality cultural, heritage and historic sites		
2. A range of natural attractions to visit (e.g. the National Park, the Islands, nature reserves, woodlands)		
3. Family-friendly places to visit (e.g. attractions & theme parks)		
4. High quality gardens & garden centres		
5. Environmentally-friendly services and facilities e.g. local produce, coastal buses, cycling tracks		
6. Excellent eating-out experiences (e.g. restaurants, cafes etc)		
7. Lively nightlife		
8. Facilities that are open all year round		
9. Award winning beaches		
10. Opportunities for walking		
11. A diverse range of outdoor activities		

**SECTION B: HOLIDAY EXPERIENCE (ASK ALL)**

**Q6a. What mode of transport did you use to get to Pembrokeshire from your home?** (Circle all applicable)

- Car 1      Motorbike 2      Motorhome 3
- Public bus/coach 4      Organised coach trip 5      Train 6
- Ferry 7      Taxi 8      Aeroplane 9 (go to Q6b)
- Walk/on foot 10      Bicycle 11      Boat/ Yacht 12 (go to Q6b)
- Other (please specify) 13 \_\_\_\_\_

**Q6b. (If travelled by plane or boat/yacht), which airport or port did you depart and arrive from?**

Departed: \_\_\_\_\_ Arrived: \_\_\_\_\_

**Q7. Approximately, how much do you and your party expect to spend on your trip today for leisure purposes within Pembrokeshire? (if staying overnight please include the cost of one night)**

Total expenses £ \_\_\_\_\_ (incl. eating, shopping etc)      Accommodation £ \_\_\_\_\_ (only if applicable)

**Q8a. Which of the following activities have you taken part in, or do you intend to take part in, during your stay? (Circle as many boxes as apply) (SHOWCARD 3)**

**Q8b. What is or will be your main activity? (Circle one response only)**

	Q8a. ALL	Q8b. MAIN
1. Short walk (up to 2 hours) <b>(Go to Q9)</b>	1	1
2. Long walk (over 2 hours) <b>(Go to Q9)</b>	2	2
3. Mountain biking / cycling	3	3
4. Active beach activities (games, swimming)	4	4
5. Passive beach activities (sunbathing, picnic)	5	5
6. Wildlife watching e.g. bird watching, dolphin watching	6	6
7. Water sports (sailing, wind surfing, water skiing)	7	7
8. Visiting friends or relatives	8	8
9. Driving around and sightseeing from car	9	9
10. Eating and drinking out	10	10
11. Horse riding	11	11
12. Shopping e.g. arts, crafts, local produce	12	12
13. Golf	13	13
14. Fishing	14	14
15. Boat trips e.g. wildlife trips	15	15
16. Visiting natural attractions (e.g. coastline, countryside, islands, nature reserves etc)	16	16
17. Visiting family / theme park or activities park	17	17
18. Visiting historic, heritage & cultural sites (inc. castles, galleries, churches & craft centres etc)	18	18
19. Visiting gardens / garden centres	19	19
20. Attending an event / show / festival e.g. food market, concert, surfing competition	20	20
21. None	21	21
22. Other (please specify) _____	22	22
23. Other (please specify) _____	23	23

*(Walkers, options 1&2, go to Q9. All others go to Q10)*

**Q9. If you undertook a walking activity, have you /or are you going to use either of the following routes...**

a. The Coastal path	Yes	1	No	2	Don't Know	3
b. The Celtic trail	Yes	1	No	2	Don't Know	3

**Q10. What areas/towns have you/or are you going to visit in Pembrokeshire during your visit? (Please circle all that apply, SHOWCARD 4: Map)**

Dale	1	Fishguard	2	Haverfordwest	3
Milford Haven	4	Narberth	5	Newgale	6
Newport	7	Pembroke	8	Saundersfoot	9
St Davids	10	Tenby	11		
Other (please specify)	12				



**SECTION C: STAYING VISITORS ONLY (i.e. those who answered 6 to 12 in Q1)**

**Q11. In total, during this visit how many nights are you staying overnight in ...**

a. Pembrokeshire No. nights:		b. Elsewhere in Wales No. nights	
c. Elsewhere in UK No. nights			

**ASK ONLY THOSE STAYING OVERNIGHT IN PEMBROKESHIRE** (Q1 options 6, 7 or 10 or 12, Others go to Q16a)

**Q12. Which town/area/village are you staying in Pembrokeshire? (SHOWCARD 4: Map, circle all applicable and prompt for specific location)**

Dale	1	Fishguard	2	Haverfordwest	3
Milford Haven	4	Narberth	5	Newgale	6
Newport	7	Pembroke	8	Saundersfoot	9
St Davids	10	Tenby	11		
Other (please specify)	12 _____				

**Q13. What type of accommodation are you staying in? (Prompt for response, circle all applicable)**

<b>PAID ACCOMMODATION ONLY (go to Q14)</b>		<b>FREE ACCOMMODATION ONLY (go to Q15)</b>	
Hotel / Motel / Lodge	1	Friends and relatives main home	12
Inn/Pub	2	Friends and relatives second home	13
Guest House/ B&B	3	Free camping	14
Self-catering	4	Owned static caravan	15
Rented static caravan	5	Owned touring caravan / Motor home	16
Rented touring caravan / Motor home	6	Boat / Yacht	17
Camping	7	Own second home	18
Youth Hostels Association (YHA)	8	Other please specify _____	19
Group accommodation/Bunk houses	9		
Boat / Yacht	10		
Other paid for accommodation (please specify) _____	11		

**ASK TO PAID ACCOMMODATION ONLY**

**Q14. On a scale of 1 to 5 (with 1 very poor and 5 being very good), how would you rate your accommodation for each of the following aspects .....? (Circle one rating only for each aspect)**

	Very Poor	Poor	Satisfactory	Good	Very Good	Don't Know
a. Cleanliness	1	2	3	4	5	6
b. Quality of décor & facilities	1	2	3	4	5	6
c. Customer service	1	2	3	4	5	6
d. Location	1	2	3	4	5	6
e. Value for money	1	2	3	4	5	6

**Q15. When did you book your accommodation? (Prompt and circle one option only)**

On arrival	1	Between 3 to 6 months	5
Within the last 2 weeks	2	Between 6 to 12 months in advance	6
Between 2 weeks to a month	3	More than 12 months ago	7
Between 1 to 3 months	4	Don't know / can't recall	8

**SECTION D: OVERALL EVALUATION OF VISIT – ASK ALL**

**Q16a. During your visit to the Pembrokeshire area have you used any of the following facilities?**

**Q16b. If used (yes), how would you rate the provision of the following facilities within the Pembrokeshire area?**

	Q16a		Q16b				
	Used	Did not use/ Don't Know	Very Poor	Poor	Satisfactory	Good	Very Good
Public transport	1	2	1	2	3	4	5
Car parking facilities	1	2	1	2	3	4	5
Information display boards	1	2	1	2	3	4	5
Tourist Information Centres	1	2	1	2	3	4	5
Cleanliness of beaches	1	2	1	2	3	4	5
General level of litter & cleanliness	1	2	1	2	3	4	5
Signposts / Brown signage	1	2	1	2	3	4	5
Availability of public toilets	1	2	1	2	3	4	5
Cleanliness of public toilets	1	2	1	2	3	4	5

**Q17. Based on what you have seen and done during your visit to Pembrokeshire and comparing to other UK destinations, how would you rate:**

	Very Poor	Poor	Satisfactory	Good	Very Good	Don't Know
a. Warmth of welcome and friendliness	1	2	3	4	5	6
b. Your overall experience of visiting Pembrokeshire	1	2	3	4	5	6
c. The overall value for money of your visit to Pembrokeshire	1	2	3	4	5	6

**Q18. What have been the most enjoyable aspects of your visit to Pembrokeshire?** (Prompt for specifics e.g. type of location, attractions, activities, accommodation, eating place, facility, service or atmosphere etc)

**Q19. Did anything spoil your visit?** (Prompt for specifics e.g. type of location, attractions, activities, accommodation, eating place, facility, service or atmosphere etc)

Nothing 1

**Q20. What would you like to see improved in Pembrokeshire?** (As above, prompt for specifics)

**Q21. How likely are you to return to Pembrokeshire?** (Circle one box only)

	Not at all likely	Not very likely	Quite likely	Very likely	Don't know
a. In the next 12 months	1	2	3	4	5
b. In the next 1 to 5 years	1	2	3	4	5

**SECTION E: ABOUT YOU** Finally a few questions about yourself in order that we ensure we speak to a cross-section of people:

**Q22. Excluding this trip, when did you last visit Pembrokeshire?** (Circle only one)

Within the last 12 months	1	1-2 years ago	2
3-4 years ago	3	5-6 years ago	4
7-10 years ago	5	More than 10 years ago	6
Never	7	Can't say	8

**Q23. Which of the following best describes your past visiting of Pembrokeshire? (Circle only one)**

This is my first ever trip to Pembrokeshire	1	I am a regular visitor (monthly/weekly)	2
I tend to visit a few times a year (3 to 4 times a year)	3	About once a year	4
Every few years	5	I have visited before – but a long time ago	6

**Q24) How many in your party on this visit were ... (Write in Number)**

		(a) Male	(b) Female
<b>Children</b>	Under 5 year		
	5 to 9 years		
	10 to 15 years		
<b>Adults</b>	16 to 18 years		
	19 to 24 years		
	25 to 34 years		
	35 to 44 years		
	45 to 54 years		
	55 to 64 years		
	65 to 74 years		
	75 year plus		
	Refused		
<b>Total</b>			

**Q25. Did you bring a dog with you?** Yes 1 No 2

**Q26. What is your home postcode? (if overseas please state country) \_\_\_\_\_**  
(Important to get full postcodes) (if no postcode please state area/county)

**Q27. What is the chief occupation of the chief wage earner/s?**  
(If retired, please write retired and the last occupation)

		For office use only				
A	B	C1	C2	D	E	
To code: UK resident 1 Overseas visitor 2						

**Q28a. Which one of the following famous people do you think would make an ideal walking buddy on a visit to Pembrokeshire? (Prompt and circle one box only)**

Charlotte Church (Singer / Presenter)	1	Aled Jones (Singer / Presenter)	5
Dylan Thomas (Poet)	2	Ryan Giggs (Football Player)	6
Richard Burton (Film Star)	3	Owain Glyndŵr (Prince of Wales 1359 – 1416)	7
Catherine Zeta Jones (Film Star)	4	Connie Fisher (Singer)	8

**Q28b. and why?**

**Q29. Finally, as part of our quality control procedure, a research supervisor may contact you in order to confirm the accuracy of the interview and to ensure you were happy with the interview. Would you be prepared to give your contact details for this purpose?**

Name: \_\_\_\_\_ Telephone/Mobile: \_\_\_\_\_  Prefer not to be contacted

**Q30. We also may also be conducting further research about visiting Pembrokeshire. We will not use your details for any other purpose. Would you be willing to be contacted and asked about participating in any future research about Pembrokeshire?**

Yes 1 No 2

**THANK RESPONDENT AND END INTERVIEW**

=====

**Interviewer Declaration** I confirm that I personally carried out this interview with a person or persons previously unknown to me in accordance with the survey instructions and the Market Research Society's Code of Conduct and that I asked all the necessary questions and correctly recorded the answers given.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix 2: Interview locations

REGION	LOCATION	INTERVIEWER DAYS
Tenby	Tenby	11
	Saundersfoot	3
	Carew Castle	2.5
	Folly Farm	2
	Manorbier	2
	Heatherton	1.5
	Heatherton Sports Park	1
	Colby	0.5
	<b>TOTAL</b>	<b>23.5</b>

## Appendix 3. Additional Verbatim comments

### Q2a – Reasons that influence your decision to visit to visit a specific place/attraction /Island etc – Other

- Folly Farm (5 responses)
- Heatherton (2 responses)
- Heatherton sports centre (5 responses)
- Oakwood

### Q2a – Reasons that influence your decision to visit because of an event or show – Other

- 21st Birthday Event
- Birthday
- Beach Bonanza
- Bowling events
- Halloween Event
- Halloween event at Colby
- NT Halloween event
- Sailing

### Q2a – Reasons that influence your decision to visit– Other

- A trip for my birthday
- Because it is half term
- Bowls Tournament
- Brought Husbands ashes to Pembrokeshire/Tenby
- Bus ride
- Castles
- Change
- Curiosity
- Doing a coach tour of Wales
- Family holiday
- Guaranteed good weather
- Holiday (2 responses)
- I like West Wales
- I used to live here
- Its a group visit
- It's a Valentines trip

- It's close and cheap
- It's half-term (2 responses)
- It's uncommercialised
- Never been before
- On a bike trip
- On a coach tour
- On way back on holiday
- On a car touring holiday
- Organised coach day trip (2 responses)
- Organised Shearings coach trip
- Re-tracing previous family visits
- Seeing a friend off
- Somewhere different
- To celebrate a birthday
- To go somewhere different
- Touring
- Wanted a day out shopping
- Wanted to chill out
- We have a hotel business here
- Weekend break

**Q3. What sources of information influenced your decision to visit Pembrokeshire before you arrived here? –Holiday Guide**

- Coast to Coast
- Frank B Mason's self-catering guide
- Holiday brochure
- IA Holland
- Italian guide to Pembrokeshire
- Welsh Tourist Board

**Q3. What sources of information influenced your decision to visit Pembrokeshire before you arrived here? –Activity Magazine**

- Help The Aged

**Q3. What sources of information influenced your decision to visit Pembrokeshire before you arrived here? –Tourist Information Centre**

- Swansea
- Cardiff
- Tenby

**Q3. What sources of information influenced your decision to visit Pembrokeshire before you arrived here? – Recommendation /Word of Mouth**

- Family (6 responses)
- Friend (19 responses)
- Party of friends

**Q3. What sources of information influenced your decision to visit Pembrokeshire before you arrived here? – Self catering/Cottage Agency**

- Powells

**Q3. What sources of information influenced your decision to visit Pembrokeshire before you arrived here? – Website**

- Accommodation site (4 responses)
- Accommodation/ Fishing
- Best of Wales, Pembrokeshire
- Cabur
- Campsite's Website
- Caravan Website
- Check surfing website
- Cottage Holidays
- Folly Farm
- Google (2 responses)
- Heatherton (3 responses)
- Hotels in Tenby
- Hotel's website
- Pembrokeshire (4 responses)
- Places to see
- Several
- T.I.B Site
- Tenby Information
- Tenby pembs
- Tesco Website
- The Campsite Website
- Things to do
- Tourist Board Web Tenby
- Various (3 responses)
- Various websites
- Virtual Tenby, T1 site
- Welsh tourist board

**Q3. What sources of information influenced your decision to visit Pembrokeshire before you arrived here? – Other**

- By friends
- Camping caravan club
- Caravan club information
- Cardiff
- Coast to Coast
- Family
- Leaflets Shops
- Lonely Planet book
- National Trust Book
- Sat Nav
- Surfing book
- The bike trip

**Q6 Which airport/ port did you depart/arrive from?**

Departure:

- Amsterdam
- Atlanta
- Auckland (New Zealand)
- Belfast
- Belgium
- Brisbane - New York

- Calais (2 responses)
- Calgary, Alberta, Canada
- Copenhagen
- Gatwick
- Heathrow (2 responses)
- Ljubljana, slovenia
- Montreal
- Paris
- Pisa
- Poland
- Rome
- Saudi Arabia
- Scotland
- Singapore
- Sydney (2 responses)
- Tours, Loire Valley

Arrival:

- Bournemouth
- Cardiff (5 responses)
- Cardigan
- Dover (2 responses)
- Dover
- Gatwick (6 responses)
- Heathrow (11 responses)
- Luton
- Milford Haven
- Milford Haven Marina today
- New York - QE2 Southampton
- Paris (The train to Pembroke)
- Stanstead (4 responses)

**Q8a – Activities already taken part in or intend to take part in during your stay – Other**

- A break from work
- Arcades
- Birthday Celebrations
- Bowling
- Day out with family
- Driving around and sightseeing from coach
- Folly Farm (11 responses)
- Halloween children's event
- Halloween Event (3 responses)
- Health related
- Heatherton
- Inter Ashes (funeral ceremony)
- Just having a break
- Just relaxing
- Paintballing (2 responses)
- Rally
- Relaxing (7 responses)
- Relaxing in our second home
- Visiting Heatherton (2 responses)
- Visiting St Davids
- Watching the world go by

**Q10. What areas/towns have you/or are you going to visit in Pembrokeshire during your visit? – Other**

- A break from work
- Arcades
- Birthday Celebrations
- Bowling
- Day out with family
- Driving around and sightseeing from coach
- Folly Farm (11 responses)
- Halloween childrens event
- Halloween Event (3 responses)
- Health related
- Heatherton
- Inter Ashes (funeral ceremony)
- Just having a break
- Just relaxing
- Paintballing (2 responses)
- Rally
- Relaxing (7 responses)
- Relaxing in our second home
- Visiting Heatherton (2 responses)
- Visiting St Davids
- Watching the world go by

**Q12. Town/ Village/Area staying in – Other**

- Cewarth
- Clunderwen
- Cochestor
- Colby, Llanteg
- Cold Inn
- Coshestow
- Druidston
- Hook
- Jameston
- Kiln Park (3 responses)
- Llandissilio (2 responses)
- Llanteg
- Martletwy
- Pembrey
- Pentlepoir (4 responses)
- Pleasant Valley, Stepside
- Skrinkle Haven
- St Brides
- St Justinians
- St Nicholas
- Stackpole
- Williamston
- Wisemans Bridge (4 responses)

**Q13 Other paid/ other free accommodation**

- Apartment
- Cottage (2 responses)



- Cottage Rented
- Haven't looked, still looking
- Longterm rental accommodation
- MS Society Bungalow
- Rented house
- Rented spot in caravan park in our own personal touring caravan
- Was a gift
- Youth Hostel
- Chalet
- Friends static caravan
- Lorry
- Own hotel

#### **Appendix 4. Cross-tabulations for TGA Area Only**

Attached as separate file.

#### **Appendix 5. Extra Cross-tabulations TGA Area Only Q12, Q13 and Q22**

Attached as separate file.