

## 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%), Sundersfoot (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>