



Parc Cenedlaethol
Arfordir Penfro
Pembrokeshire Coast
National Park

WALES CYMRU



Arolwg Ymwelwyr Sir Benfro Pembrokeshire Visitor Survey

Adroddiad wedi'i baratoi gan

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Executive Summary

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Project Overview

Pembrokeshire County Council in association with Pembrokeshire Coast National Park Authority, Wales Tourist Board, Welsh Development Agency and South West Wales Tourism Partnership commissioned Research and Marketing Ltd to undertake a Visitor Survey across Pembrokeshire for a twelve-month period to November 2004.

The principal aim of the research was to develop a better understanding of visitors to the Pembrokeshire area, in order for the Council to target services appropriately and to enhance the Council's ability to evaluate changing attitudes to improvements and developments.

- Ascertain the views and opinions of visitors to Pembrokeshire.
- Determine which activities are most popular with visitors and those that need to be developed.
- Evaluate whether the facilities, events and current marketing activity are meeting the needs of visitors to Pembrokeshire.
- Identify approaches to make Pembrokeshire more appealing to potential and actual visitors.
- Evaluate and rate the current available accommodation stock.
- Identify visitor expectations and motivations in the choice of their holiday.
- Establish the level of overall satisfaction of their visit.
- Measure the awareness of local visitor attractions.
- Determine the likelihood of returning to Pembrokeshire.

Methodology

The research methodology adopted consisted of two separate questionnaires, each aiming to address the principal and secondary objectives outlined previously. The first was a series of face-to-face interviews conducted across Pembrokeshire throughout the year and the second a self-completion survey distributed at a number of outdoor activity providers.

The face-to-face research exercise began in December 2003, with a target set for interviews for each quarter, to be spread relatively evenly across the months. In total 1,446 interviews were completed over the 12 month period and we exceeded the quotas by 96 interviews and only missed the target quota in two of the months. In total 193 self-completion questionnaires were returned.

Visitor Characteristics

- 50.8% were Male and 49.2% were Female.
- The largest proportion of visitors were aged 45 – 54 years (21.0%), with around one fifth of respondents aged 35-44 years, 55 – 64 years and 65 years or older.

- 30.2% of the visitors to Pembrokeshire were classified as socio economic group AB and 36.7% as C1.
- The average size of the group/party visiting Pembrokeshire was 3.33, the size of the party varied throughout the year, with it peaking in quarter two at 3.57 people and 3.49 people in quarter three.
- Visitors to Pembrokeshire from Wales accounted for the largest proportion of total visitors (34.0%).

Holiday Characteristics

- Nine out of ten visitors to Pembrokeshire visited for 'holiday or leisure' reasons and 8.4% to visit friends.
- The most popular length of stay was a holiday of one week (29.1%) and a short break of 1-3 nights (30.4%), with 14.2% of visitors visiting on a day trip to Pembrokeshire.
- The majority of respondents stated that their visit to Pembrokeshire was not their main holiday of the year.
- The two main reasons why people chose to visit Pembrokeshire were its 'attractive coast' (45.8%) and that they had visited before (48.7%).
- Visitors were also asked 'unprompted,' those features and attractions that had attracted them to Pembrokeshire. The main reasons were the Beaches and Coast (91.1% of all respondents), with the other reasons including 'Heritage', 'Nature & Wildlife' and 'the National Park'.

The Pembrokeshire Holiday Experience

- The majority (91.1%) of visitors to Pembrokeshire travelled by Car. Other modes of transport used were the bus/coach (3.0%) and the train (2.5%).
- The main areas of importance attached to the pre holiday experience were those of unspoilt scenery, culture, peace & quiet, family friendly and walking. In terms of the overall experience all initial expectations were surpassed and all the factors were rated in a positive manner following the holiday.
- Tenby (28.1%) and St David's (12.4%) were the most popular locations to stay; other areas included Saundersfoot (11.6%) and Narberth (6.7%).
- The majority of people took part in 'walking' (69.7%), 'boat trips' (14%) and 7.8% 'bird watching'.
- The three most visited places in Pembrokeshire were 'Coast and Beaches' (87.3%), 'Countryside' (75.2%) and 'Castles & Heritage sites' (60.2%).
- The preferred type of accommodation for visitors staying in Pembrokeshire was self-catering (28%), with 16% staying in a hotel.
- In terms of visitors that had paid for their accommodation i.e. not staying with friends or own caravan or property, 88.9% of visitors rated the accommodation 'very good' overall, with only 1.2% rating it as 'Poor' or 'Very Poor'.
- Rented static caravans received the most favourable overall rating of accommodation (91.9% rated as very good), closely followed by Bed and Breakfast (91.5%) and Self Catering accommodation (90.6%). Hotels were rated less favourably overall and in particular in terms of décor and value for money in comparison to the other main types of accommodation.

- The lead time in terms of people planning their visit to Pembrokeshire varied throughout the year, with the proportion booking the most in advance in quarter three with 44.8% booking at least three months in advance.
- The most popular source of information on Pembrokeshire was that of 'previous experience' (55.9%) and the second most popular source was the Internet (16.0%).

Evaluation and Summary of the Holiday Experience

- The majority of visitors to Pembrokeshire were very happy with the overall experience of visiting Pembrokeshire. In particular, visitors rated the warmth of welcome and the cleanliness of beaches as the two main factors rated as very good.
- In terms of value for money, the majority of respondents rated Pembrokeshire as either 'Good Value' or 'Very Good Value', with around one third of respondents rating it as 'Very Good Value'.

The majority of respondents stated that they were likely to return to Pembrokeshire within the next 12 months or 5 years.

Crynodeb Gweithredol

Trosolwg o'r Prosiect

Comisiynwyd Research and Marketing Cyf gan Gyngor Sir Penfro mewn cysylltiad ag Awdurdod Parc Cenedlaethol Arfordir Penfro, Bwrdd Croeso Cymru, Awdurdod Datblygu Cymru a Phartneriaeth Twristiaeth De Orllewin Cymru i gynnal Arolwg Ymwelwyr ar draws Sir Benfro am gyfnod deuddeg-mis hyd fis Tachwedd 2004.

Prif nod yr ymchwil oedd datblygu gwell dealltwriaeth o ymwelwyr i ardal Sir Benfro er mwyn i'r Cyngor dargedu ei wasanaethau mewn ffordd addas ac i hybu gallu'r Cyngor i werthuso newid mewn agweddau at welliannau a datblygiadau.

- Casglu barn a sylwadau ymwelwyr i Sir Benfro.
- Penderfynu pa weithgareddau sydd fwyaf poblogaidd gydag ymwelwyr a pha weithgareddau sydd angen eu datblygu.
- Gwerthuso os yw'r cyfleusterau, digwyddiadau a gweithgaredd marchnata presennol yn ateb anghenion ymwelwyr i Sir Benfro.
- Dynodi dynesiadau i wneud Sir Benfro yn fwy deniadol i ddarpar ymwelwyr ac ymwelwyr gwirioneddol.
- Gwerthuso a graddio'r stoc llety sydd ar gael ar hyn o bryd.
- Dynodi disgwyliadau ymwelwyr a'u cymhellion wrth ddewis eu gwyliau
- Canfod lefel boddhad cyffredinol eu hymweliad.
- Mesur yr ymwybyddiaeth o atyniadau ymwelwyr lleol.
- Penderfynu pa mor debygol ydynt o ddychwelyd i Sir Benfro.

Methodoleg

Roedd y fethodoleg ymchwil a fabwysiadwyd yn cynnwys dau holiadur ar wahân, pob un yn anelu i fynd i'r afael â'r prif amcanion ac amcanion eilaidd a amlinellwyd yn flaenorol. Roedd y cyntaf yn gyfres o gyfweliadau wyneb-i-wyneb a gynhaliwyd ar draws Sir Benfro drwy gydol y flwyddyn a'r ail yn arolwg hunan-lenwi a ddosbarthwyd mewn nifer o safleoedd darparwyr gweithgareddau awyr agored.

Dechreuodd yr ymarferiad ymchwil wyneb-i-wyneb ym mis Rhagfyr 2003, gyda tharged wedi ei osod ar gyfer cyfweliadau am bob chwarter, i'w gwasgaru'n gymharol wastad ar draws y misoedd. Cwblhawyd cyfanswm o 1,446 o gyfweliadau dros y cyfnod 12 mis. Cynhaliwyd 96 yn fwy o gyfweliadau na'r cwota a dim ond mewn dau o'r misoedd y methwyd cyrraedd y cwota targed. Derbyniwyd cyfanswm o 193 holiadur hunan-lenwi.

Nodweddion Ymwelwyr

- Roedd 50.8% yn Wrywod a 49.2% yn Fenywod.
- Roedd y gyfran fwyaf o ymwelwyr yn 45 – 54 oed (21.0%), gyda tua un ym mhob pump o'r ymatebwyr yn 35-44 oed, 55 – 64 oed a 65 oed neu hŷn.
- Roedd 40.2% o'r ymwelwyr i Sir Benfro yn perthyn i grŵp economaidd gymdeithasol AB a 36.7% yn perthyn i grŵp C1.

- Maint cyfartalog y grŵp/parti yn ymweld â Sir Benfro oedd 3.33, gyda maint y parti yn amrywio drwy gydol y flwyddyn gan gyrraedd ei frig yn yr ail chwarter yn 3.57 o bobl a 3.49 o bobl yn y trydydd chwarter.
- Ymwelwyr i Sir Benfro o Gymru oedd y gyfran fwyaf o gyfanswm ymwelwyr (34.0%).

Nodweddion Gwyliau

- Ymwelodd naw allan o ddeg ymwelydd i Sir Benfro ar gyfer rhesymau 'gwyliau neu hamdden' a 8.4% i ymweld â ffrindiau.
- Y cyfnod arhosiad mwyaf poblogaidd oedd gwyliau o un wythnos (29.1%) a gwyliau byr o 1-3 noson (30.4%), gyda 14.2% o ymwelwyr yn ymweld ar drip dydd i Sir Benfro.
- Dywedodd mwyafrif yr ymatebwyr nad eu hymweliad i Sir Benfro oedd eu prif wyliau yn y flwyddyn.
- Y ddau brif reswm pam y dewisodd pobl ymweld â Sir Benfro oedd ei 'harfordir deniadol' (45.8%) a'u bod wedi ymweld o'r blaen (48.7%).
- Gofynnwyd i ymwelwyr 'heb eu cymell' hefyd am y nodweddion a'r atyniadau oedd wedi eu denu i Sir Benfro. Y prif resymau oedd y Traethau a'r Arfordir (91.1% o'r holl ymatebwyr), gyda'r rhesymau eraill yn cynnwys 'Treftadaeth', 'Natur a Bywyd Gwyllt' a 'y Parc Cenedlaethol'.

Profiad Gwyliau Sir Benfro

- Teithiodd mwyafrif (91.1%) ymwelwyr i Sir Benfro gyda char. Dulliau eraill o drafnidiaeth a ddefnyddiwyd oedd bws/coets (3.0%) a thrên (2.5%).
- Y prif feysydd o bwysigrwydd a gysylltwyd â'r profiad cyn gwyliau oedd golygfeydd naturiol, diwylliant, heddwch a thawelwch, cyfeillgar i'r teulu a cherdded. Rhagorwyd ar yr holl ddisgwyliaid dechreuol yn nhermau'r profiad cyffredinol a chafodd yr holl ffactorau eu graddio mewn modd cadarnhaol yn ystod y gwyliau.
- Dinbych y Pysgod (28.1%) a Tyddewi (12.4%) oedd y lleoliadau mwyaf poblogaidd i aros ynddynt, roedd ardaloedd eraill yn cynnwys Saundersfoot (11.6%) ac Arberth (6.7%).
- Cymerodd y rhan fwyaf o bobl ran mewn 'cerdded' (69.7%), 'tripiau cwch' (14%) a 7.8% 'adara'.
- Y tri lle yr ymwelwyd mwyaf â hwy yn Sir Benfro oedd 'Arfordir a Thraethau' (87.3%), 'Cefn Gwlad' (75.2%) a 'Cestyll a Threftadaeth' (60.2%).
- Y math o lety oedd orau gan ymwelwyr yn aros yn Sir Benfro oedd hunan-ddarpar (28%), gyda 16% yn aros mewn gwesty.
- Yn nhermau ymwelwyr a dalodd am eu llety h.y. heb fod yn aros gyda ffrindiau neu eu carafan neu eiddo eu hunain, graddiodd 88.9% o ymwelwyr y llety fel bod yn 'dda iawn' yn gyffredinol, gyda dim ond 1.2% yn ei raddio yn 'Wael' neu 'Wael iawn'.
- Carfanau sefydlog ar rent gafodd y graddiad mwyaf ffafriol ar gyfer llety yn gyffredinol (91.9% wedi eu graddio fel da iawn), gyda Gwely a Brecwast (91.5%) a llety Hunan-Ddarpar (90.6%) yn dilyn yn agos. Cafodd gwestai eu graddio'n llai ffafriol yn gyffredinol ac yn neilltuol o ran addurniad a gwerth am arian o gymharu gyda'r prif fathau eraill o lety.

- Roedd y cyfnod arweiniol yn nhermau pobl yn cynllunio eu hymweliad i Sir Benfro yn amrywio drwy gydol y flwyddyn, gyda'r gyfran yn archebu mwyaf ymlaen llaw yn y trydydd chwarter gyda 44.% yn archebu o leiaf dri mis ymlaen llaw.
- Y ffynhonnell mwyaf poblogaidd o wybodaeth ar Sir Benfro oedd 'profiad blaenorol' (55.9%) a'r Rhyngwyd oedd yr ail ffynhonnell mwyaf poblogaidd (16.0%).

Gwerthusiad a Chrynodeb o'r Profiad Gwyliau

- Roedd mwyafrif yr ymwelwyr i Sir Benfro yn hapus iawn gyda'r profiad cyffredinol o ymweld â Sir Benfro. Yn neilltuol, roedd ymwelwyr yn gwerthfawrogi'r croeso cynnes a glanweithdra traethau fel y ddwy brif ffactor a raddiwyd yn dda iawn.
- Yn nhermau gwerth am arian, graddiodd y rhan fwyaf o'r ymatebwyr Sir Benfro fel un ai 'Gwerth Da am Arian' neu 'Gwerth Da lawn am Arian' gyda tua thraean yr ymatebwyr yn ei raddio fel 'Gwerth Da lawn am Arian'.
- Dywedodd mwyafrif yr ymatebwyr eu bod yn debyg o ddychwelyd i Sir Benfro o fewn y 12 mis neu 5 mlynedd nesaf.