



STRICTLY PRIVATE AND CONFIDENTIAL

Pembrokeshire Holiday Guide 2008

Media Campaign Effectiveness Research

Client: Pembrokeshire County Council

Date: March 2009

Carrier Direct Marketing

Westacott Road

Barnstaple

EX32 8AW

Tel: 01271 336000

Fax: 01271 336008

Email: sales@carrierdirectmarketing.co.uk

Website: www.carrierdirectmarketing.co.uk

Customer Maze Ltd

24 Bootham Crescent

York

YO30 7AH

Tel: 01904 628034

Fax: 0870 486 7534

Email: info@customermaze.com

Website: www.customermaze.com

Background and Objectives

Pembrokeshire County Council commissioned Carrier Direct Marketing and Customer Maze to undertake a comprehensive conversion research exercise on marketing activity carried out by Pembrokeshire Tourism in 2008.

The main aim was to identify whether people who had requested the Holiday Guide had then gone on to book a holiday as a result. It also aims to identify which media types and titles are most effective in reaching visitors that ultimately book a holiday in the area, to calculate return on investment for the 2008 marketing activity and provide detailed information about those that visited Pembrokeshire in 2008.

Methodology

Customer Maze conducted 2,210 telephone interviews between the 2nd and the 20th March 2009. Contact was made with those people that had previously requested the Pembrokeshire Holiday Guide as a result of the media campaign. The following list details the different media types that were used as marketing channels for the Holiday Guide. The initials in the brackets are how the media groups will be displayed in the charts and tables throughout the report:

Radio Times (RT)	Enjoy Traditional British Holiday (ETBH)
Daily Mail (DM)	Opinion Poll Survey (OPS)
INFO (INFO)	Where to go Britain (WTGB)
Planning a Holiday (PH)	RDP/CIC Online (RDP)
Telemarketing Questionnaire (TQ)	Brada online (BO)
Take a Break DM (TBDM)	www.catalogue-link.co.uk (CL)
CIC (CIC)	Enjoy a Family Holiday CD (EFH)
Axiom (AXC)	Enjoy a UK Break (EUKB)
UK Holiday Collection (UKHC)	Enjoy an Autumn UK Break Card (EAUKB)
Enjoy a Seaside Holiday Card (ESHC)	TIC Requests (TIC)
UK Autumn Break Collection (UKABC)	Website Requests (WR)

Notes on Interpretation

This report contains several charts, tables and graphs that show the results of the survey. In some instances the responses may not add up to 100%. There are several reasons why this might happen; the question may have allowed each respondent to give more than one answer; only the most common responses may be shown in the table; or individual percentages may have been rounded to the nearest whole number such that the total comes to 99% or 101%.

Health Warning

It is important to be aware that some questions have very low response rates and therefore are displayed as having low bases. In these instances it is advised that this data is not statistically reliable and it is recommended that strategic decisions are not based solely on this data.

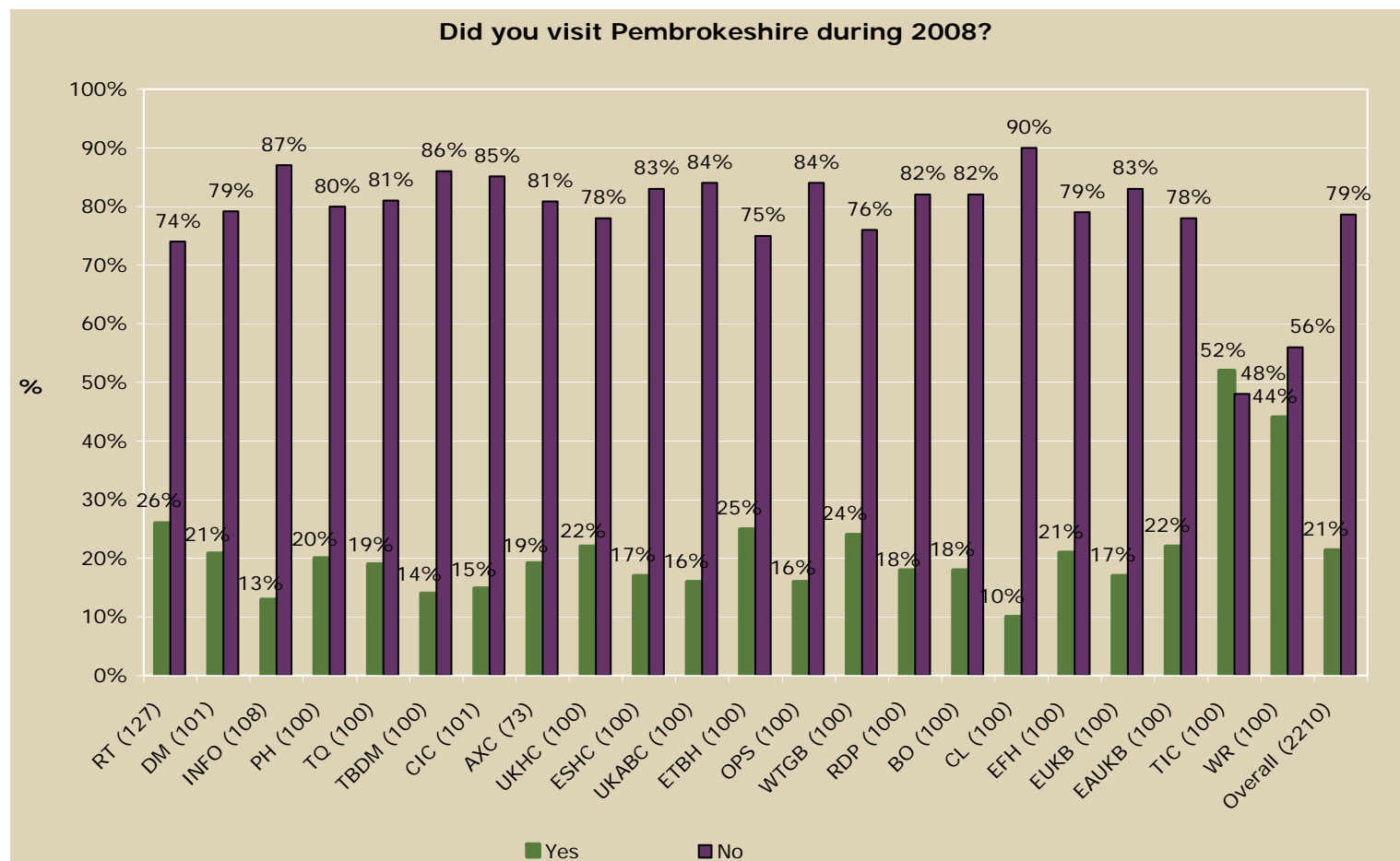
Where possible, data from the 2007, 2006 and 2005 surveys has been included in the report. It is important to read this information with caution and as an indication only as it may not be directly comparable to the data from previous reports based on the different media sources and different bases. It is to be used as an indication only.

As different media channels have been used over the years, comparisons will only be drawn with the overall results.

Main Findings

The charts and tables throughout the report show the breakdown of responses by media group and an overall picture.

Q1: Did you visit Pembrokeshire during 2008?



In 2008, 21% of respondents visited Pembrokeshire, this is a slight decrease of 3% when compared to the 24% recorded in 2007.

25% visited in 2006 and 28% visited in 2005.

The best performing media titles were TIC and Website requests with 52% and 44% of respondents visiting the area in 2008 [respectively].

Q2: How many nights did you stay?

Q2 was only asked of respondents that visited Pembrokeshire in 2008, as stated in Q1. (Note the low bases for all categories)

	Day trip %	1 night %	2 nights %	3 nights %	4 nights %	5 nights %	6 nights %	7 Nights %	8 nights %	9 Nights %	10 Nights %	11 Nights %	14 Nights %	15 Nights %	CR* %
RT (33)	0	0	3	6	15	0	0	67	0	3	0	0	6	0	0
DM (21)	19	0	14	19	10	10	5	24	0	0	0	0	0	0	0
INFO (14)	14	7	7	0	14	29	0	14	0	7	0	0	0	7	0
PH (20)	5	0	10	15	20	0	5	20	0	0	10	5	10	0	0
TQ (19)	5	5	16	16	5	5	0	42	0	0	0	0	5	0	0
TBDM (14)	14	0	0	7	7	7	0	50	0	0	0	0	14	0	0
CIC (15)	33	7	0	13	0	0	7	40	0	0	0	0	0	0	0
AXC (14)	14	0	14	29	7	7	0	22	7	0	0	0	0	0	0
UKHC (22)	9	9	9	14	18	9	0	28	0	0	0	0	0	0	5
ESHC (17)	18	0	12	6	6	12	6	30	0	0	0	0	6	6	0
UKABC (16)	19	0	31	25	0	6	0	19	0	0	0	0	0	0	0
ETBH (25)	16	4	8	24	16	4	4	12	4	0	0	0	0	0	8
OPS (16)	13	0	6	13	0	13	6	31	0	0	6	0	6	6	0
WTGB (24)	13	4	17	13	13	0	0	29	0	4	0	0	8	0	0
RDP (18)	28	0	11	0	6	6	6	33	0	0	0	0	6	0	6
BO (18)	22	0	11	11	11	11	0	17	0	0	0	0	6	0	11
CL (10)	10	0	0	10	0	0	0	70	0	0	0	0	10	0	0
EFH (21)	14	0	14	19	5	14	0	24	0	0	0	5	5	0	0
EUKB (17)	6	0	12	6	6	6	6	41	12	0	0	0	6	0	0
EAUKB (22)	18	0	18	14	0	5	0	32	0	0	5	0	5	0	5
TIC (52)	6	0	10	6	17	12	2	31	2	0	0	0	15	0	0
WR (44)	2	2	5	14	9	7	9	30	0	3	2	0	9	0	9
Overall (472)	12	2	10	12	10	7	3	32	1	*	1	*	6	*	2

* Denotes a value of less than one percent but has a value greater than zero

The bases for some of the individual media codes in the table above are exceptionally low. It is for this reason that it is advised to look only at the *overall* results; it is recommended that the other data should not be used as stand alone information due to its lack of statistical reliability. Just over half, 52% stayed in Pembrokeshire for 4-7 nights, 24% stayed for a short break of 1-3 nights and 12% visited for a *day trip*. These figures are very similar to 2007's when 48% stayed for 5-7 nights, 29% stayed for 1-4 nights and 10% visited for a day trip. The average length of stay in 2008 was 5.04 nights.

In 2006, 54% stayed in Pembrokeshire for 5-7 nights, 25% stayed for a short break [1-4nights] and 8% visited for a *day trip*.

Q4. What type of accommodation did you use?

Q4 was only asked of respondents that visited Pembrokeshire in 2008, as stated in Q1. (Note the low bases for all categories)

	Hotel %	B&B/GHse %	SC %	C&C %	VFR %	Own a/c %	Youth hostel %	Other %	CR* %
RT (8)	75	13	13	0	0	0	0	0	0
DM (12)	50	8	33	0	8	0	0	0	0
INFO (8)	0	50	0	25	0	13	0	13	0
PH (10)	30	30	30	10	0	0	0	0	0
TQ (9)	22	22	0	33	22	0	0	0	0
TBDM (3)	33	0	0	33	33	0	0	0	0
CIC (4)	75	25	0	0	0	0	0	0	0
AXC (8)	50	0	13	38	0	0	0	0	0
UKHC (13)	15	46	0	15	8	0	8	0	8
ESHC (7)	43	29	0	29	0	0	0	0	0
UKABC (10)	30	30	0	10	10	10	0	0	10
ETBH (15)	53	33	7	7	0	0	0	0	0
OPS (6)	50	17	17	17	0	0	0	0	0
WTGB (11)	36	28	9	18	0	0	0	0	9
RDP (5)	0	40	40	20	0	0	0	0	0
BO (8)	0	38	38	25	0	0	0	0	0
CL (1)	0	100	0	0	0	0	0	0	0
EFH (11)	18	45	18	9	0	9	0	0	0
EUKB (6)	17	50	0	0	33	0	0	0	0
EAUKB (8)	25	0	13	50	0	0	0	0	13
TIC (24)	42	29	13	13	4	0	0	0	0
WR (20)	30	15	25	5	5	10	0	5	5
Overall (207)	33	27	14	15	5	2	*	*	2

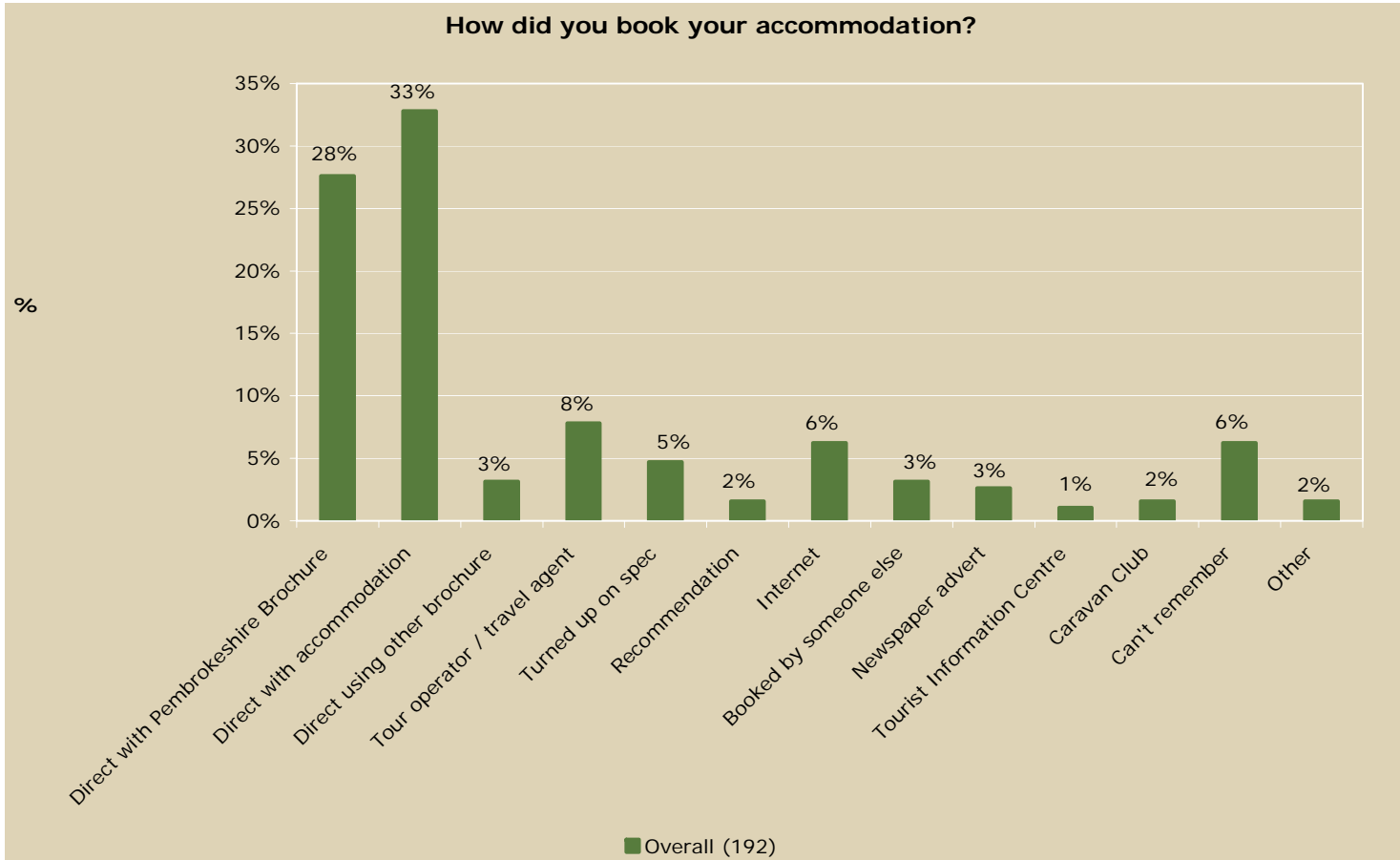
* Denotes a value of less than one percent but has a value greater than zero. The option for Holiday Parks received no response so there is no data for this option.

Again, 2008 has seen an increase in the number of people choosing to stay in *B&B/Guesthouse accommodation* with 27% choosing this type of accommodation in 2008 as opposed to 18% in 2007 and 16% in 2006. 33% stayed in *hotel accommodation*, 15% stayed in *Caravan & Camping accommodation* and 14% stayed in *Self catering accommodation*.

The same types of accommodation were popular in 2007 and 2006. In 2007 25% choose to stay in self catering, 24% in hotels and 22% in caravan and camping. In 2006, 27% chose to stay in self catering, 24% in hotels and 23% in caravan and camping.

Q5. How did you book your accommodation?

Q5 was only asked of respondents that visited Pembrokeshire in 2008, as stated in Q1.



Respondents indicated that the most popular way to book their accommodation was *directly with the accommodation provider* with 33% stating this. 28% booked their accommodation using the *Pembrokeshire brochure*.

This is an increase on the 24% that booked *directly with the accommodation provider* in 2007 and 22% that used the *Pembrokeshire brochure*. In 2006, 41% booked *directly with the accommodation provider* and only 16% used the *Pembrokeshire brochure*.

2008 has also seen another decline in the use of the *Internet*, with 6% using it to book their accommodation, as opposed to 9% in 2007 and 12% in 2006.

* As the bases were again very low for this question, the results have been displayed as an overall picture.

Q6: How many people were there in your party?

Q6 was only asked of respondents that Pembroke in 2008, as stated in Q1. (Note the low bases for all categories)

	1 person %	2 people %	3 people %	4 people %	5 people %	6 people %	7 people %	8 people %	9 People %	10 People %	11 People + %	CR* %
RT (33)	3	73	9	12	0	0	0	0	0	0	3	0
DM (21)	5	48	19	10	10	5	0	0	0	0	5	0
INFO (14)	0	71	21	0	0	7	0	0	0	0	0	0
PH (20)	0	70	10	15	5	0	0	0	0	0	0	0
TQ (19)	5	63	5	11	11	0	0	0	0	0	5	0
TBDM (14)	7	57	0	14	7	7	0	0	0	7	0	0
CIC (15)	0	53	7	27	13	0	0	0	0	0	0	0
AXC (14)	0	64	21	7	0	0	0	0	0	0	7	0
UKHC (22)	0	64	9	14	0	5	0	5	0	0	5	0
ESHC (17)	6	65	12	12	0	0	0	0	0	0	0	6
UKABC (16)	6	63	6	19	0	0	0	0	0	0	6	0
ETBH (25)	4	68	12	12	0	0	0	4	0	0	0	0
OPS (16)	0	31	13	25	0	6	0	0	6	6	13	0
WTGB (24)	4	50	8	25	8	4	0	0	0	0	0	0
RDP (18)	6	44	6	22	6	0	0	0	0	0	6	11
BO (18)	0	44	17	28	0	6	0	0	0	0	6	0
CL (10)	0	50	10	30	0	0	0	0	0	0	10	0
EFH (21)	0	81	0	19	0	0	0	0	0	0	0	0
EUKB (17)	0	71	0	18	0	6	0	0	6	0	0	0
EAUKB (22)	0	86	5	5	0	0	0	0	0	0	5	0
TIC (52)	8	60	4	19	4	2	2	2	0	0	0	0
WR (44)	0	48	11	14	9	2	9	2	0	0	0	5
Overall (472)	3	60	9	16	4	2	1	*	*	*	3	1

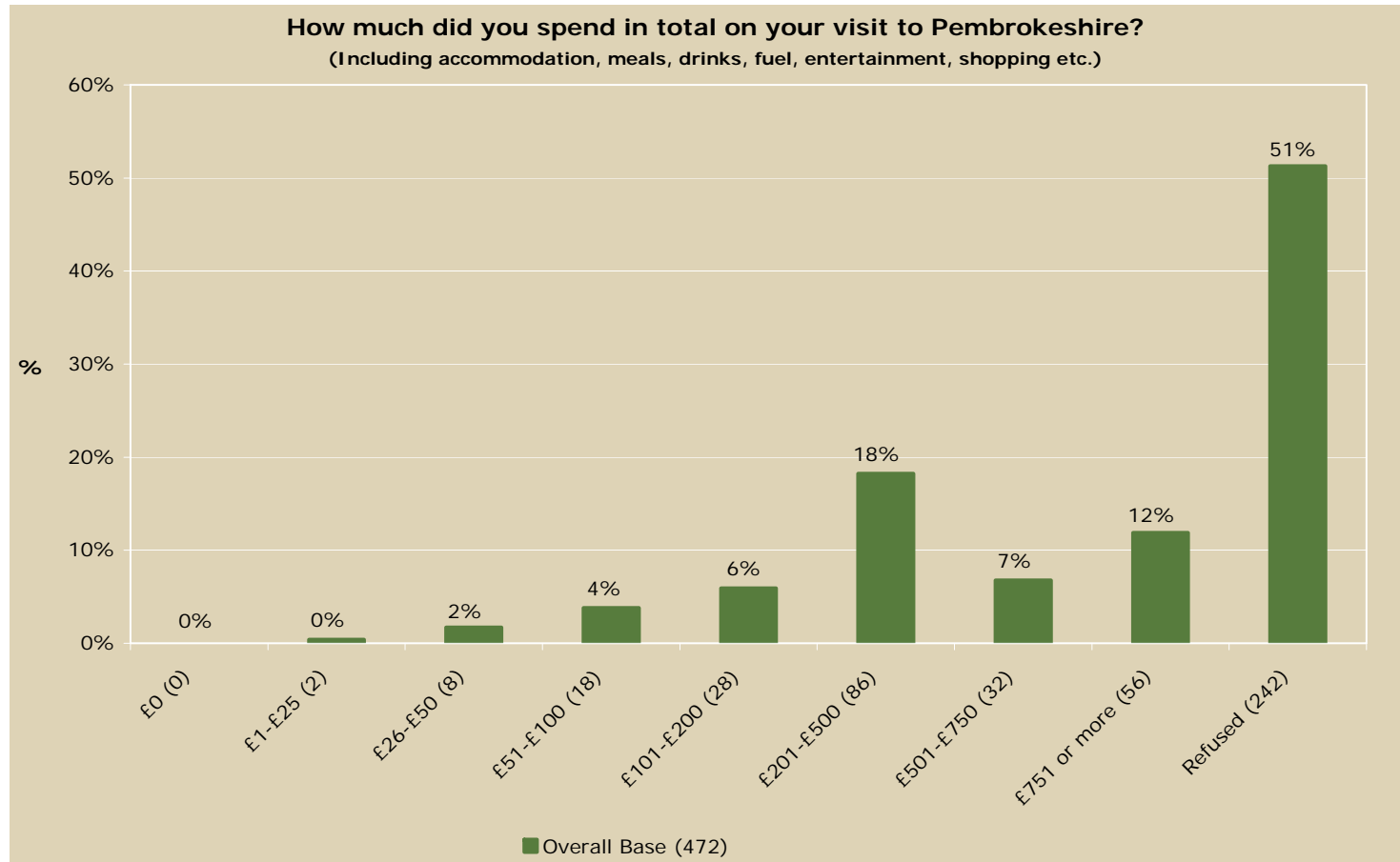
* Denotes a value of less than one percent but has a value greater than zero

60% of respondents visited Pembroke in 2008 in a party size of *two people* and a further 16% visited in a party size of *4 people*. Overall, the average number of people per visit in 2008 was 3.39. 12 respondents stated that they travelled in a party size of 11 people or more, they were then asked to specify how many people they travelled with and the responses ranged from 11 to 53 people with 5 respondents travelling in a party size of 40 people or more.

These figures are very similar to those returned in 2007 and 2006. In 2007, 60% of respondents visited in a party size of 2 people and 14% travelled in a party size of 4 people. In 2006, 64% of respondents visited in a party size of *two people* and again, 14% visited in a party size of *4 people*.

Q8: How much did you spend in total on your visit to Pembrokeshire? (Including accommodation, meals, drinks, fuel, entertainment, shopping etc.)

Q8 was only asked of respondents that visited Pembrokeshire in 2008, as stated in Q1.



18% of those respondents that did provide information stated that they spent a total of £201 to £500, per trip. 12% stated that they spent £751 or more, in total, per trip, whereas only 6% spent less than £100 in total, during their visit or trip to Pembrokeshire.

Not accounting for those that declined to provide information for this question, the average spend, per person, per day for staying visitors in 2008 was £40.96.

For day visitors, the average spend per person, in 2008 was £50.62. It is worth noting that one respondent stated they spent £1,200 on their day trip, which has increased the overall average. Without this response, the average spend per day for day visitors would have been £38.55

Getting 'spend' data is a real challenge in research with most respondents choosing to refuse to offer information (51% overall in this case).

Q9: What was it about Pembrokeshire that persuaded you to visit?

Q9 was only asked of respondents that visited Pembrokeshire in 2008, as stated in Q1 (Note the low bases for all categories)

	Nothing in part %	Nat. Park %	Outdoor activities %	Beaches coastline %	Walking %	Peace & Quiet %	Repeat Visitor %	VFR %	Events %	Attraction %	Never been before %	CR %	Other %
RT (33)	3	0	3	30	12	0	30	9	0	0	12	0	0
DM (21)	0	5	10	14	5	5	14	14	9	10	10	5	0
INFO (14)	7	0	0	14	0	0	36	7	0	14	14	0	7
PH (20)	20	5	5	15	10	10	25	5	5	0	0	0	0
TQ (19)	5	0	5	0	5	11	53	11	0	0	11	0	0
TBDM (14)	14	14	0	7	0	7	21	21	0	0	7	0	7
CIC (15)	13	0	0	0	7	0	60	0	0	7	0	0	13
AXC (14)	0	14	7	29	7	0	29	0	0	0	7	0	7
UKHC (22)	9	9	0	5	5	0	36	9	0	5	18	5	0
ESHC (17)	6	6	0	0	6	0	53	12	6	0	6	0	6
UKABC (16)	13	0	0	13	0	6	44	0	0	0	13	6	6
ETBH (25)	4	4	4	8	36	0	28	0	4	8	0	0	4
OPS (16)	6	6	6	19	0	6	44	0	0	6	0	0	6
WTGB (24)	0	4	4	13	4	8	38	8	4	0	17	0	0
RDP (18)	0	0	0	22	0	0	50	17	0	6	6	0	0
BO (18)	11	11	0	33	0	0	22	17	0	6	0	0	0
CL (10)	10	10	0	20	10	0	20	10	0	0	20	0	0
EFH (21)	5	5	0	19	0	19	33	0	0	0	14	0	5
EUKB (17)	0	0	0	24	0	0	47	12	0	0	6	0	12
EAUKB (22)	0	5	0	40	0	0	36	14	0	0	5	0	0
TIC (52)	4	2	2	29	8	4	25	12	2	8	4	0	2
WR (44)	5	9	7	14	7	5	23	9	2	5	7	0	9
Overall (472)	6	5	3	18	6	4	33	9	2	4	8	*	4

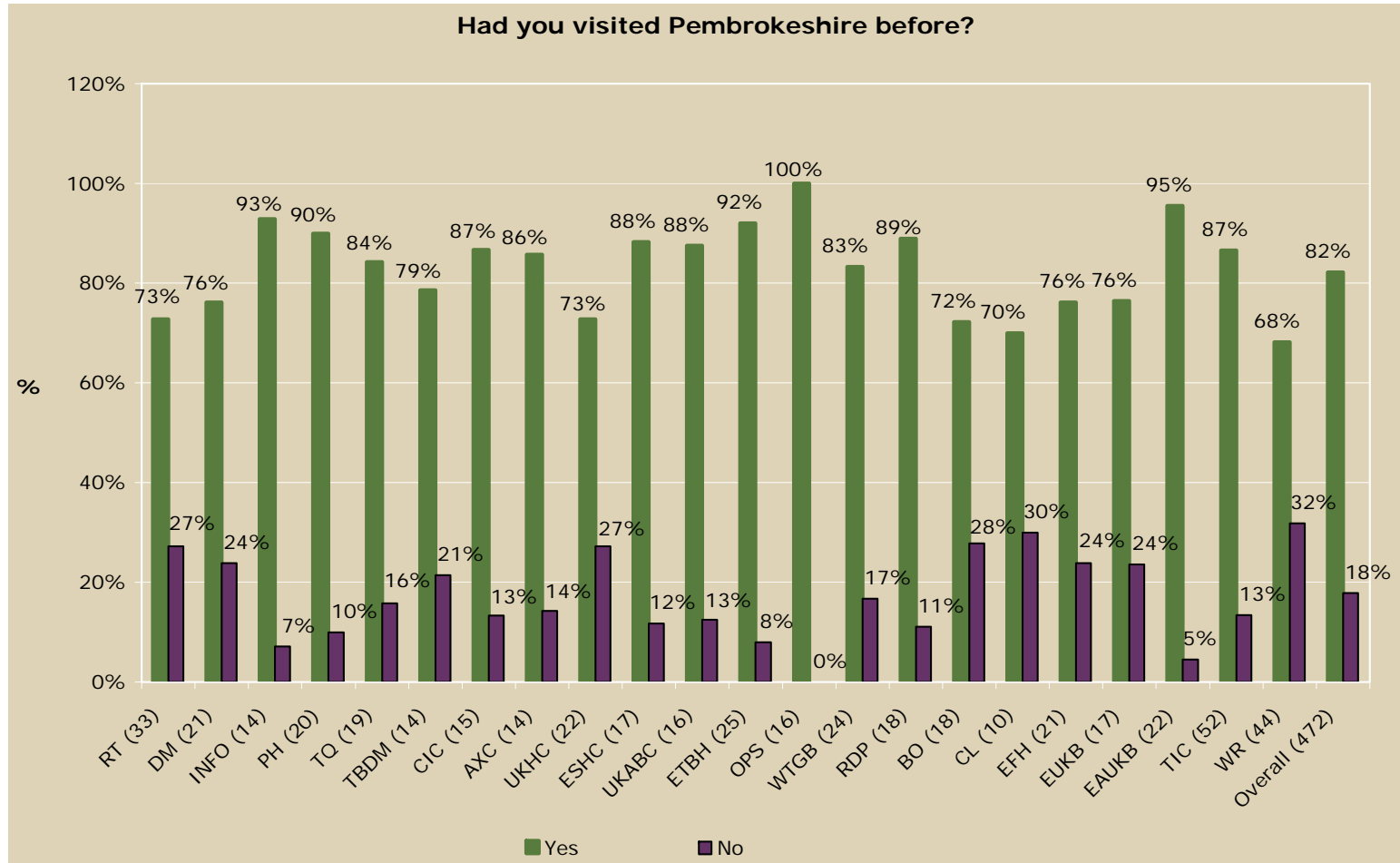
* Denotes a value of less than one percent but has a value greater than zero

A third (33%) of respondents that visited Pembrokeshire in 2008 stated that they were persuaded to visit because of a *previous visit*, this was followed by 18% who were persuaded by the *beaches and coastline*.

In 2007, 27% were persuaded by the *beaches and coastline* and 24% were persuaded by a *previous visit*. This was a significant change from 2006 where 28% of respondents stated that they chose to visit because of the *sightseeing* (only 8% stated this in 2007) and 20% visited for the *beaches / coastline*. Only 16% in 2006 stated that they were *repeat visitors*, which has increased to 24% in 2007 and 33% in 2008.

Q11: Had you visited Pembrokeshire before?

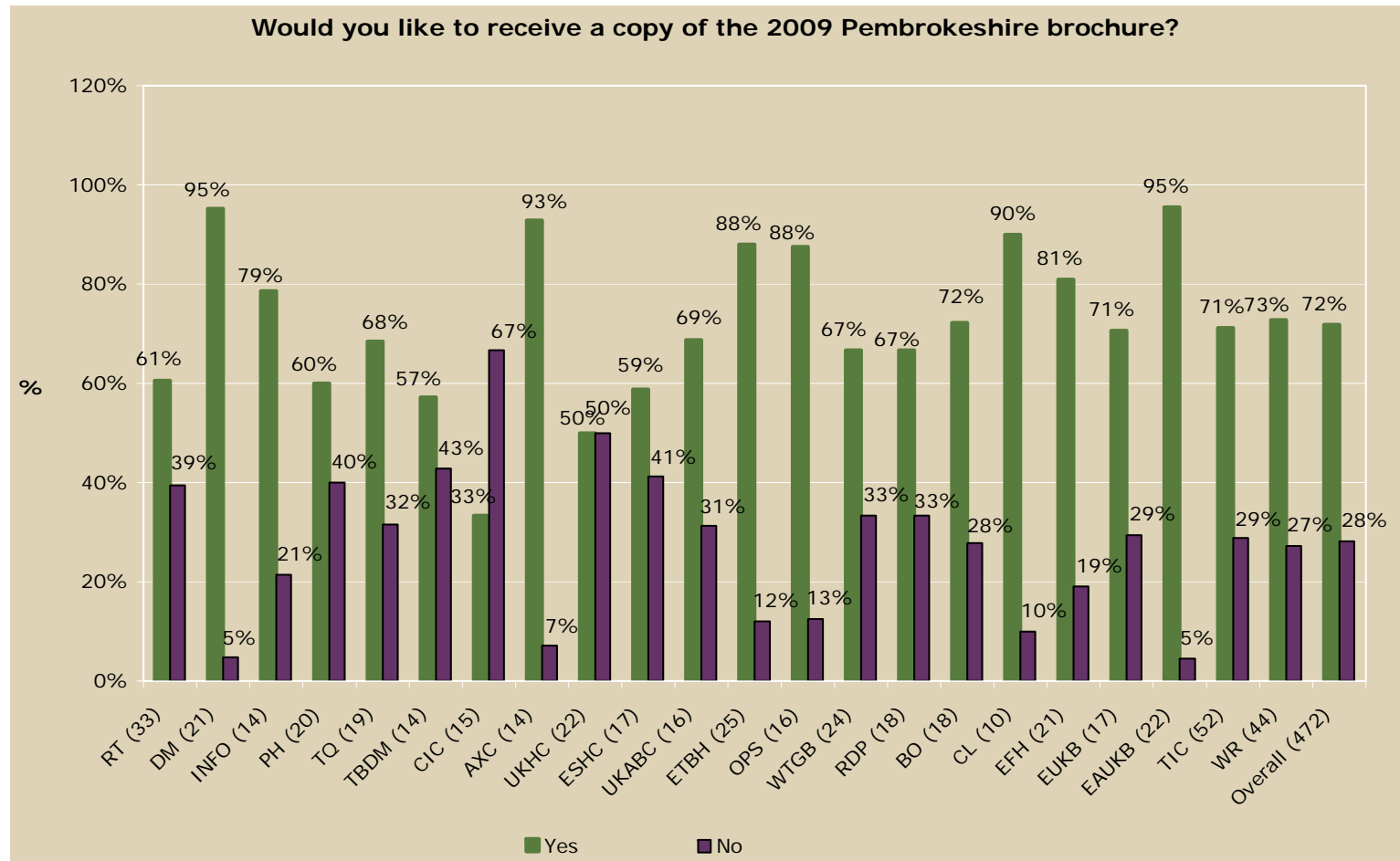
Q11 was only asked of respondents that visited Pembrokeshire in 2008, as stated in Q1 (Note the low bases for all categories)



82% of respondents that visited Pembrokeshire in 2008 stated that they had visited before, which is an increase on the 78% who stated this in 2007 and 75% in 2006, highlighting a continuing pattern of repeat visitors.

Q12: Would you like to receive a copy of the 2009 Pembrokeshire brochure?

Q12 was only asked of respondents that visited Pembrokeshire in 2008, as stated in Q1. (Note the low bases for all categories)



The majority of nearly all media groups said that they would like to receive a copy of the 2009 Pembrokeshire brochure.

Overall, 72% stated this, which is a slight decrease on the 82% that wished to receive the guide in 2008.

In total, 339 requests for the 2009 brochure have been received as a result of this question.

Q13: How likely are you to visit Pembrokeshire again in the future?

Q13 was only asked of respondents that visited Pembrokeshire in 2008, as stated in Q1. (Note the low bases for all categories)

	Very Likely %	Quite Likely %	Neither Likely nor Unlikely %	Not Likely %	Not at all Likely %	Don't Know %
RT (33)	48	27	21	3	0	0
DM (21)	52	29	19	0	0	0
INFO (14)	50	29	7	14	0	0
PH (20)	60	30	10	0	0	0
TQ (19)	58	11	26	5	0	0
TBDM (14)	29	50	14	7	0	0
CIC (15)	40	53	7	0	0	0
AXC (14)	71	21	7	0	0	0
UKHC (22)	32	36	23	0	0	9
ESHC (17)	53	18	24	6	0	0
UKABC (16)	57	25	13	0	0	6
ETBH (25)	48	40	8	4	0	0
OPS (16)	75	25	-	0	0	0
WTGB (24)	46	33	21	0	0	0
RDP (18)	67	28	6	0	0	0
BO (18)	56	33	11	0	0	0
CL (10)	60	30	10	0	0	0
EFH (21)	57	29	10	5	0	0
EUKB (17)	53	29	6	12	0	0
EAUKB (22)	86	9	5	0	0	0
TIC (52)	60	21	13	6	0	0
WR (44)	41	39	13	5	0	2
Overall (472)	54	29	13	3	0	*

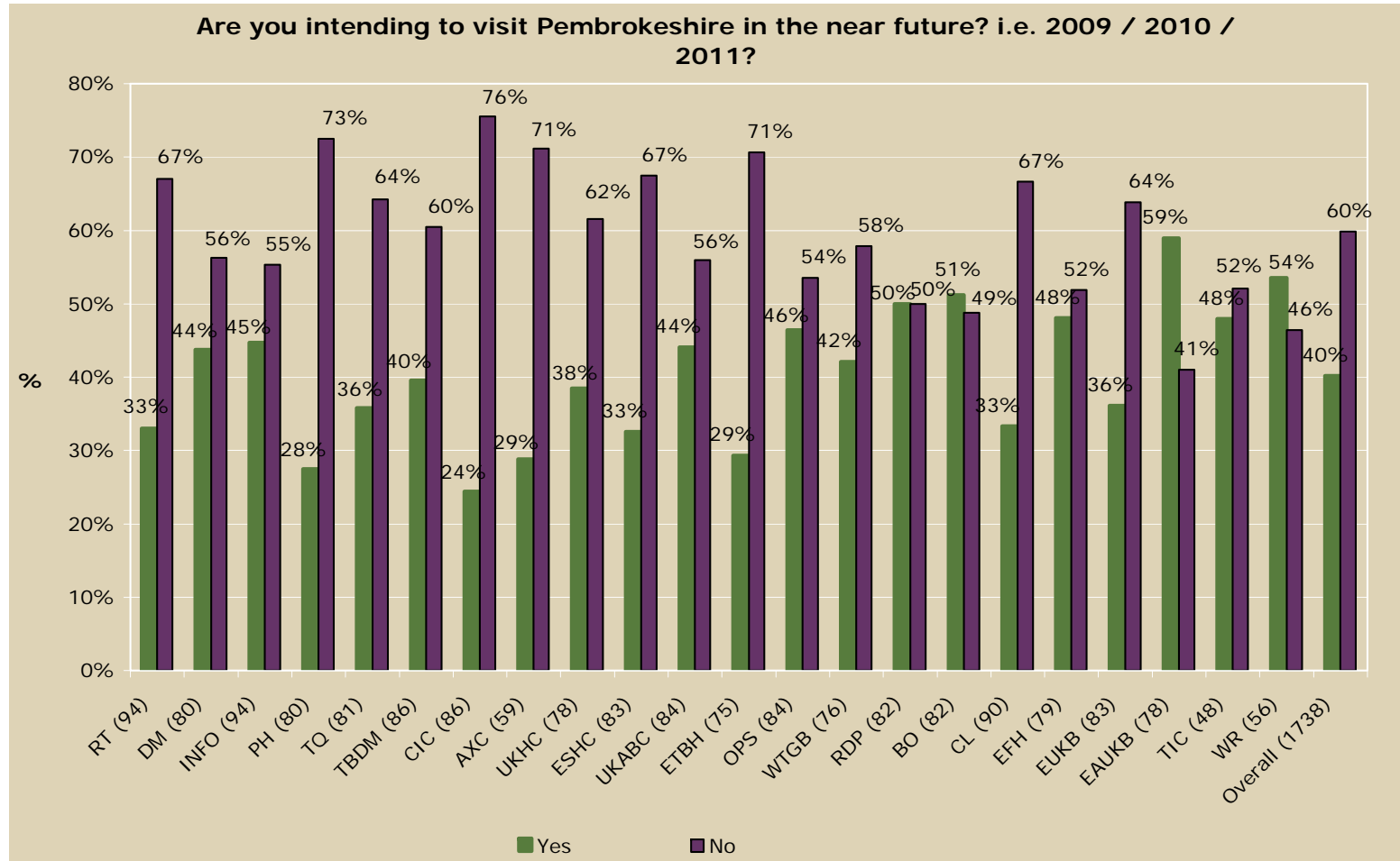
* Denotes a value of less than one percent but has a value greater than zero

54% of respondents that visited Pembrokeshire in 2008 stated that they were *very likely* to visit again in the future with a further 29% stating that they were *quite likely* to visit again. 3% said they were *not* or *not at all likely* to visit again in the future.

In 2007, 56% of respondents said they were *very likely* to visit again in the future with a further 33% stating that they were *quite likely* to visit again. This question was not asked in the 2006 research.

Q14: Are you intending to visit Pembrokeshire in the near future? i.e. 2009 / 2010 / 2011?

Q14 was only asked of respondents that did **NOT** visit Pembrokeshire in 2008, as stated in Q1.
(Note the low bases for all categories.)



40% of respondents that did not visit Pembrokeshire in 2008 said that they intended to visit in the near future.

59% of those that responded via Enjoy an Autumn UK Break stated that they intended to visit in the near future, whereas only 24% of those that responded via the Consumer Information Centre said that they intended to visit in the near future

Q15: How many nights will you stay?

Q15 was only asked of respondents that did **NOT** visit Pembrokeshire in 2008, as stated in Q1 but intend to visit in 2009/2010/2011, as stated in Q14. (Note the low bases for all categories.)

	DT %	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %	13 %	14 %	15+ %	DK %
RT (31)	0	3	0	23	13	13	6	29	0	0	0	0	0	0	3	0	10
DM (35)	0	0	17	14	14	9	11	26	0	0	0	0	0	0	3	3	3
INFO (42)	2	0	5	24	7	5	10	29	0	0	2	0	0	0	0	0	17
PH (22)	5	0	5	5	0	9	0	36	0	0	0	0	0	0	5	0	36
TQ (29)	0	0	10	28	28	7	0	10	0	0	0	0	0	0	3	0	14
TBDM (34)	0	0	3	9	9	12	12	35	0	0	3	0	0	0	3	0	15
CIC (21)	0	0	0	19	10	0	0	14	0	0	0	0	0	0	0	0	57
AXC (17)	0	0	12	29	6	6	6	29	0	0	0	0	0	0	0	0	12
UKHC (30)	0	0	0	13	10	10	7	33	0	0	0	0	0	0	13	3	10
ESHC (27)	4	0	0	37	15	15	15	4	0	0	0	0	0	0	4	0	7
UKABC (37)	0	0	14	27	11	11	3	27	3	0	0	0	0	0	0	0	5
ETBH (22)	5	5	0	9	5	5	0	41	0	0	0	0	0	0	0	0	32
OPS (39)	3	0	3	8	3	3	0	46	0	0	0	0	0	0	3	0	33
WTGB (32)	0	0	0	9	3	6	3	31	9	0	3	0	0	0	0	0	34
RDP (41)	7	0	10	20	7	0	10	32	2	0	0	0	0	0	0	0	12
BO (42)	0	2	10	5	12	10	0	43	0	0	0	0	0	0	7	0	12
CL (30)	3	0	0	10	10	17	13	13	0	0	0	0	0	0	7	0	27
EFH (38)	3	0	18	3	3	5	0	29	5	0	3	0	0	0	21	0	11
EUKB (30)	0	0	7	17	7	0	0	17	13	0	0	0	0	0	3	0	37
EAUKB (46)	0	2	9	17	20	4	0	26	0	0	0	0	0	0	0	0	22
TIC (23)	0	0	13	0	9	22	9	17	0	0	0	0	0	0	9	0	22
WR (30)	3	0	3	13	0	7	13	17	0	0	0	0	0	0	0	0	43
Overall (698)	2	*	7	15	9	8	5	27	2	0	*	0	0	0	4	*	20

* Denotes a value of less than one percent but has a value greater than zero

DK=Don't Know

49% of respondents that did not visit Pembrokeshire in 2008 but indicated that they would visit in the near future stated that they would stay for a longer break of 4-7 *nights*. A further 22% stated that they intended to stay for a short break of 2-4 *nights*. 2 respondents stated 'other' when asked how long they would stay and when asked how long that would be, 1 respondent said they would for 21 days and the other respondent said they would stay up to 28 days or more.

Q17: How many people will there be in your party?

Q17 was only asked of respondents that did **NOT** visit Pembrokeshire in 2008, as stated in Q1 but intend to visit in 2009/2010/2011, as stated in Q14. (Note the low bases for all categories.)

	1 person %	2 people %	3 people %	4 people %	5 people %	6 people %	7 people %	8 people %	9 People %	10 People %	11 People + %	DK* %
RT (31)	6	74	6	3	0	3	0	0	0	0	0	6
DM (35)	6	80	6	6	3	0	0	0	0	0	0	0
INFO (42)	7	76	10	7	0	0	0	0	0	0	0	0
PH (22)	0	45	5	23	0	0	0	0	0	0	0	27
TQ (29)	10	72	4	3	3	0	0	3	0	0	0	3
TBDM (34)	9	67	9	12	0	0	0	0	0	0	0	3
CIC (21)	0	43	10	14	0	0	0	0	0	0	0	33
AXC (17)	0	53	18	12	12	0	0	0	0	0	0	6
UKHC (30)	3	70	0	10	3	0	0	0	3	0	3	7
ESHC (27)	4	67	7	7	0	0	0	0	0	0	4	11
UKABC (37)	3	81	5	3	0	3	0	0	0	0	0	5
ETBH (22)	14	68	5	5	0	0	0	0	0	0	5	5
OPS (39)	3	56	10	15	3	0	0	0	0	3	0	10
WTGB (32)	0	56	9	16	6	0	0	0	0	0	0	13
RDP (41)	2	56	5	17	7	5	0	2	0	0	0	5
BO (42)	5	50	19	10	12	0	0	2	2	0	0	0
CL (30)	0	57	7	17	7	7	0	0	0	0	0	7
EFH (38)	0	79	8	8	3	3	0	0	0	0	0	0
EUKB (30)	0	80	3	3	0	0	0	0	0	0	0	13
EAUKB (46)	2	76	2	4	2	0	0	0	0	0	0	13
TIC (23)	0	70	4	17	0	4	0	0	0	0	0	4
WR (30)	0	47	3	30	0	0	0	0	0	0	0	20
Overall (698)	3	66	7	11	3	1	0	*	*	*	*	8

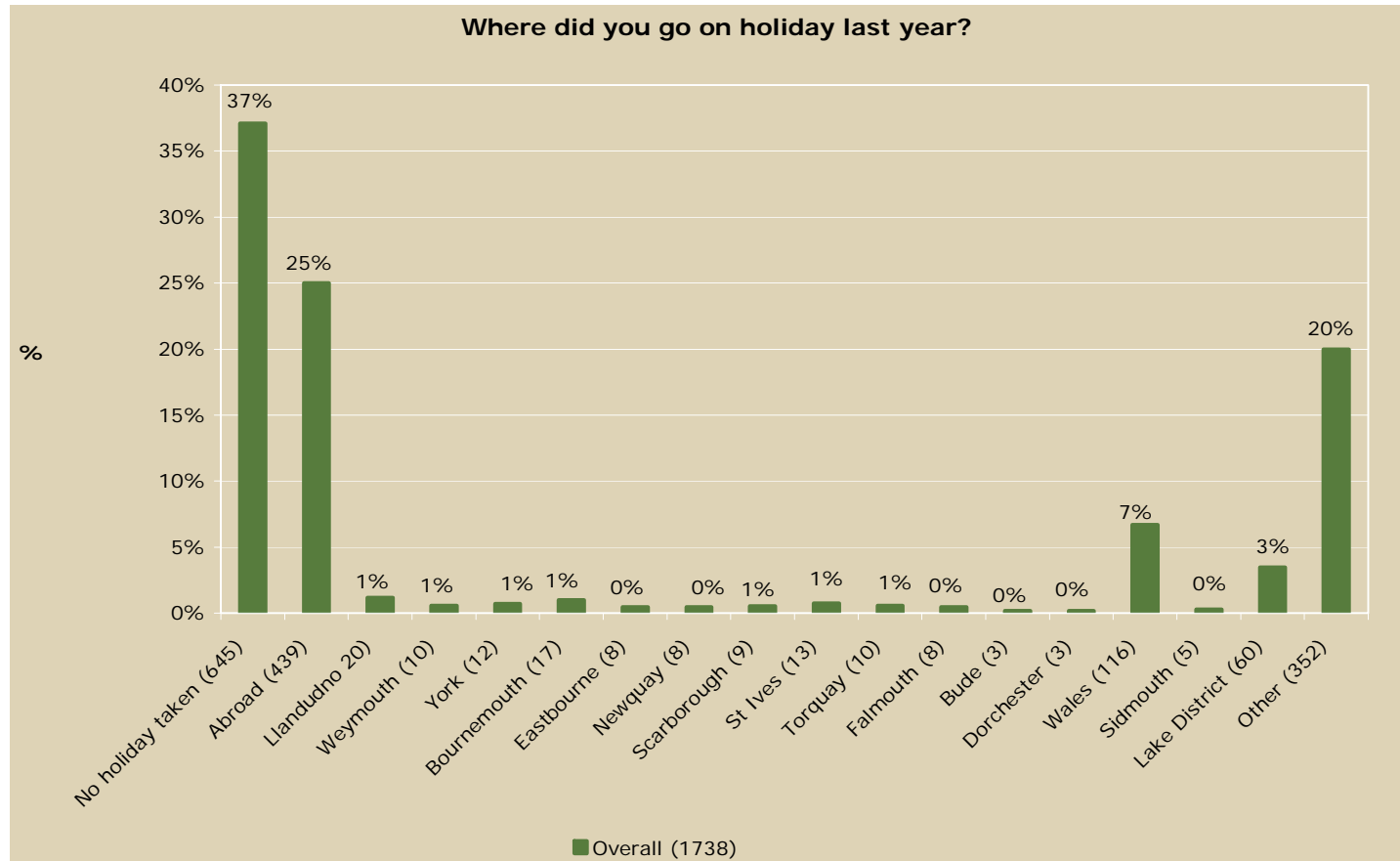
* Denotes a value of less than one percent but has a value greater than zero

DK=Don't Know

66% of those respondents that did not visit in 2008 but intend to visit in the near future stated that they would visit in a party size of 2 people. A further 11% stated that would travel in a party size of 4 people. 3 respondents said they would travel with a coach party with 30+ people.

Q19: Where did you go on holiday last year?

Q19 was only asked of respondents that did NOT visit Pembrokeshire in 2008, as stated in Q1.



The opposite table shows where respondents chose to visit in 2008 as opposed to visiting Pembrokeshire. The findings showed that 37% *did not go on holiday* in 2008, which is similar to the 29% recorded in 2007. 25% *went abroad* in 2008, whereas 27% *went abroad* in 2007.

367 respondents (20%) selected 'other' when asked where they went on holiday in 2008. Those respondents were then asked to specify where they went and those destinations can be seen on the next page.

Q20: Please specify the 'other' place that you went on holiday last year?

Q20 was only asked of respondents that did **NOT** visit Pembrokeshire in 2008, as stated in Q1 and stated 'other' to Q19.

367 respondents (20%) selected 'other' when asked where they went on holiday in 2008. Those respondents were then asked to specify where they went and the following destinations were recorded.

Of the areas listed overleaf, the most popular were Scotland, Devon, Cornwall, Norfolk and Isle of White.

Q20: Please specify the 'other' place that you went on holiday last year?

Area	No'	Area	No'	Area	No'	Area	No'
Scotland	33	Derbyshire	2	Dublin and Skegness	0	Poole	0
Devon	29	Egypt	2	Dumfries	0	Porthleven	0
Cornwall	24	Essex	2	Durham	0	Richmond	0
Norfolk	19	Fife	2	East Devon	0	Rock	0
Isle Of White	12	France	2	Eastbourne	0	Scilly Is	0
Dorset	9	Germany	2	Exeter	0	Sidmouth	0
Jersey	7	Hampshire	2	Exmoor	0	Sidmouth	0
Blackpool	6	Lancashire	2	Filey	0	Snowdonia	0
Northumberland	6	Newport	2	Fishguard	0	south coast	0
Minehead	5	North Norfolk	2	Gower	0	South Devon	0
Somerset	5	North Wales	2	Gran Canaria	0	South of France	0
Yorkshire	5	Northampton	2	Greece	0	Southern Scotland	0
Cotswolds	4	Oxfordshire	2	Highlands	0	St Mawes, Cornwall	0
Ireland	4	Peak District	2	Horncastle	0	Stafford	0
Lincolnshire	4	Southport	2	Ibiza	0	Staffs	0
London	4	Aberdeen	1	Ilfracombe	0	Stratford	0
Cant Remember	3	All around Suffolk	1	Inverness	0	Suffolk	0
Exmouth	3	Alnwick	1	Isle of man	0	Sussex	0
Great Yarmouth	3	Anglesey	1	Isle of Scilly	0	Swansea	0
Hereford	3	Australia	1	Lee on Solent	0	The lizard	0
Kent	3	Barnstaple	1	Lindisfarne	0	The North East	0
Lyme Regis	3	Bath	1	Littlehampton	0	Thornton Le Dale	0
Newcastle	3	Beer, South Devon	1	Longleat, Wiltshire	0	Thorpeness	0
North Devon	3	Betws-y-Coed	1	Lowestoft	0	Tintagel	0
Oban	3	Birmingham	1	Manabear	0	Tonbridge	0
Penzance	3	Bodmin Moor	1	Manchester	0	Torquay	0
Perranporth	3	Bracon	1	Monmouth	0	Motor home	0
Scarborough	3	Bristol	1	Morecombe	0	Wales	0
Shropshire	3	Bruges	1	Morocco	0	Wells-next-to-the Sea	0
Skegness	3	Bude	1	Na	0	Westbury, Wiltshire	0
Whitby	3	Butlins, Minehead	1	Newhaven	0	Weston Super Mare	0
Barmouth	2	Cardiganshire	1	North East England	0	Wiltshire	0
Brixham	2	Carmarthen	1	North Walsham	0	Winchester	0
Burnham-On-Sea	2	Castleton	1	Norway	0	Windermere & Port Patrick	0
Buxton	2	Cheltenham	1	Norwich	0	Woolacombe bay	0
Cambridge	2	Cheshire, Northumberland	1	Nr St Ives	0	Worcester	0
Channel islands	2	Chester	1	Outer Hebrides	0		0
Dawlish	2	Cirencester	1	Poland	0		0

Q21: How did you book your accommodation?

Q21 was only asked of respondents that did **NOT** visit Pembrokeshire in 2008, as stated in Q1. (Note the low bases for all categories)

	A %	B %	C %	D %	E %	F %	G %	H %	I %	J %	K %	L %	M %	N %	O %	P %	Q %
RT (94)	34	14	19	17	1	1	5	2	4	0	1	0	0	0	0	0	1
DM (80)	25	21	13	16	3	5	9	1	1	0	0	0	0	0	0	4	3
INFO (94)	34	9	18	21	5	1	4	0	1	0	3	0	0	0	0	1	2
PH (80)	35	20	25	8	3	3	5	0	3	0	0	0	0	0	0	0	0
TQ (81)	41	9	21	14	1	1	2	1	6	0	0	0	0	1	0	2	0
TBDM (86)	28	10	34	8	7	3	7	1	0	0	0	0	0	0	0	1	0
CIC (86)	43	16	23	6	1	0	5	0	1	0	1	0	0	0	0	3	0
AXC (59)	49	15	20	5	0	0	7	0	0	0	0	0	0	0	0	3	0
UKHC (78)	28	15	23	6	3	5	6	6	1	0	0	0	1	0	0	3	1
ESHC (83)	46	12	20	8	2	0	2	0	2	0	1	1	0	0	0	4	0
UKABC (84)	37	15	17	13	4	1	8	1	1	0	0	0	0	0	0	2	0
ETBH (75)	47	5	21	16	5	0	1	0	0	0	0	1	0	0	0	0	3
OPS (84)	31	6	27	7	4	1	12	1	2	2	1	0	0	1	1	1	1
WTGB (76)	32	12	22	9	4	1	9	0	5	0	0	0	0	0	0	5	0
RDP (82)	54	2	13	4	4	0	13	2	0	0	0	0	0	0	1	6	0
BO (82)	38	7	11	5	7	1	24	2	2	0	1	0	0	0	0	0	0
CL (90)	38	10	18	8	1	2	9	2	3	0	0	1	0	0	0	6	2
EFH (79)	34	8	29	6	1	3	11	3	1	0	0	0	0	0	0	4	0
EUKB (83)	28	8	29	8	2	2	11	0	2	0	1	1	0	0	0	5	1
EAUKB (78)	28	5	15	17	5	3	15	5	3	0	0	0	0	0	0	4	0
TIC (48)	28	4	13	23	4	0	2	2	4	0	0	0	0	0	0	10	0
WR (56)	27	14	32	5	0	0	14	0	0	0	4	0	0	0	0	4	0
Overall (1738)	36	11	21	10	3	2	8	1	2	*	1	*	*	*	*	3	1

Key:

- A: No holiday taken
- B: Direct using other brochure
- C: Tour operator / Travel agent
- D: Direct with accommodation
- E: Stayed with friends & family
- F: Had own accommodation
- G: Internet
- H: Turned up on spec
- I: Booked by someone else
- J: Recommendations
- K: Tourist Information Centre
- L: Newspaper advert
- M: Teletext
- N: Competition prize
- O: Timeshare
- P: Can't remember
- Q: Other

* Denotes a value of less than one percent but has a value greater than zero

The figures in the above table show that 36% of those that did not visit Pembrokeshire in 2008 *did not go on holiday*, 21% booked their accommodation elsewhere using a *tour operator/travel agent*, 11% booked *direct using other brochures*, a further 10% booked their accommodation *direct with the accommodation provider* and 8% used the *Internet*. Other ways respondents booked their accommodation include; through a coach touring group, took their own trailer tent, caravan or Motor home or they used various methods to book their accommodation.

Q23: What was the main reason for deciding not to visit Pembrokeshire during 2008?

Q23 was only asked of respondents that did **NOT** visit Pembrokeshire in 2008, as stated in Q1. (Note the low bases for all categories)

	A %	B %	C %	D %	E %	F %	G %	H %	I %	J %	K %
RT (94)	16	22	32	10	2	2	3	6	0	4	22
DM (80)	10	11	20	18	1	1	10	5	4	13	8
INFO (94)	21	13	23	12	4	4	7	5	3	4	2
PH (80)	25	28	28	3	5	3	3	4	1	3	0
TQ (81)	17	19	10	19	6	9	4	12	1	2	1
TBDM (86)	22	15	12	10	6	3	14	12	1	1	3
CIC (86)	26	29	19	8	3	2	3	5	0	3	1
AXC (59)	29	36	8	8	7	2	5	0	0	5	0
UKHC (78)	22	18	29	12	3	5	1	1	3	1	5
ESHC (83)	14	37	18	7	2	4	2	1	1	12	0
UKABC (84)	14	19	19	13	4	2	13	10	2	2	1
ETBH (75)	17	29	21	13	7	3	5	0	0	4	0
OPS (84)	35	18	23	11	1	4	5	1	0	1	2
WTGB (76)	28	12	33	11	7	4	4	0	1	1	0
RDP (82)	13	37	22	4	5	6	7	0	0	5	1
BO (82)	26	22	22	12	6	2	0	2	2	2	2
CL (90)	20	28	28	6	4	1	2	0	0	10	1
EFH (79)	30	18	14	14	3	4	5	4	4	4	1
EUKB (83)	33	16	22	13	1	4	7	2	0	0	2
EAUKB (78)	24	21	14	8	4	9	12	3	0	4	3
TIC (48)	13	19	27	15	6	2	2	4	2	8	2
WR (56)	34	21	20	5	0	0	7	9	0	4	0
Overall (1738)	22	22	21	10	4	4	6	4	1	4	2

Key:

- A: Went abroad
- B: Did not go on holiday
- C: No particular reason
- D: Illness/death in family
- E: Financial reasons
- F: Personal reasons
- G: Time restrictions
- H: Been before -wanted a change
- I: Too far to travel
- J: Elsewhere more appealing
- K: Other

The figures in the above table show that overall, 22% of respondents that did not visit Pembrokeshire in 2008 stated that they *did not go on holiday* in 2008, a further 22% *went abroad* and 21% had *no particular reason* for not visiting. 10% stated that their main reason for not visiting was due to *illness/death in the family*. These figures are very similar to those recorded in 2007 where 25% had *no particular reason for not visiting*, 14% *went abroad* and 14% did not visit due to *illness/death in the family*.

Q24: Please specify the 'other' reason for deciding not to visit Pembrokeshire during 2008?

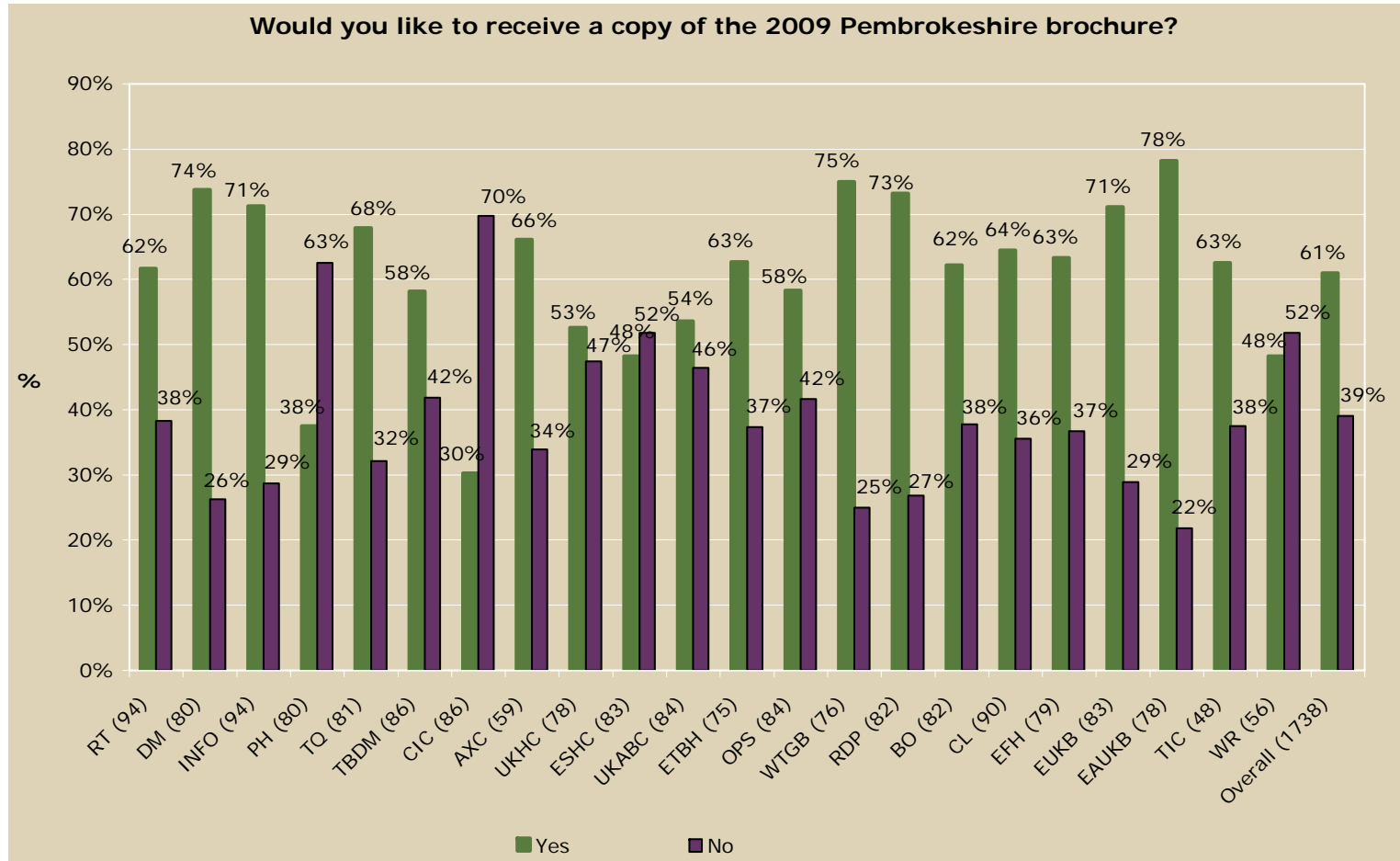
Q24 was only asked of respondents that did **NOT** visit Pembrokeshire in 2008, as stated in Q1 but stated 'other' to Q23. (Note the low bases for all categories)

32 respondents (2%) selected 'other' when asked what was the main reason for deciding not to visit Pembrokeshire during 2008. Those respondents were then asked to specify what that 'other' reason was and the responses included the following.

Bad Weather x 13	Not enough choice of accommodation
Did not receive a brochure	Not enough information about the area
Couldn't find anything suitable 'disabled' accommodation	No suitable s/c accommodation available
Didn't go away	Saving for wedding
Difficulty in train journey connections	Self catering prices were too high
Family booked holiday elsewhere	Somewhere different
Family visited	Transport problems
Had an extension built	No reason
Elderly dog can't be left	No particular reason
Just had twins	Moved house

Q25: Would you like to receive a copy of the 2009 Pembrokeshire brochure?

Q25 was only asked of respondents that did NOT visit Pembrokeshire in 2008, as stated in Q1.
 (Note the low bases for all categories)



The chart opposite shows that the majority of all respondents that did not visit Pembrokeshire in 2008 would like to receive a copy of the 2009 Pembrokeshire brochure. Overall, 61% stated this, which equates to 1059 brochure requests.

Conversion Rates

	Media Title	Total Survey	% Total Survey	Total Visitors	% Total Survey	% Total Visitors	Conversion
	Radio Times	127	5.75%	33	1.49%	6.99%	25.98%
	Daily Mail	101	4.57%	21	0.95%	4.45%	20.79%
	INFO	108	4.89%	14	0.63%	2.97%	12.96%
	Planning a Holiday	100	4.52%	20	0.90%	4.24%	20.00%
	Telemarketing Questionnaire	100	4.52%	19	0.86%	4.03%	19.00%
	Take a Break DM	100	4.52%	14	0.63%	2.97%	14.00%
	Consumer Information Centre	101	4.57%	15	0.68%	3.18%	14.85%
	Axciom	73	3.30%	14	0.63%	2.97%	19.18%
	UK Holiday Collection	100	4.52%	22	1.00%	4.66%	22.00%
	Enjoy a Seaside Holiday Card	100	4.52%	17	0.77%	3.60%	17.00%
	UK Autumn Break Collection	100	4.52%	16	0.72%	3.39%	16.00%
	Enjoy Traditional British Holiday	100	4.52%	25	1.13%	5.30%	25.00%
	Opinion Poll Survey	100	4.52%	16	0.72%	3.39%	16.00%
	Where to go Britain	100	4.52%	24	1.09%	5.08%	24.00%
	RDP/CIC Online	100	4.52%	18	0.81%	3.81%	18.00%
	Brada online	100	4.52%	18	0.81%	3.81%	18.00%
	www.catalogue-link.co.uk	100	4.52%	10	0.45%	2.12%	10.00%
	Enjoy a Family Holiday CD	100	4.52%	21	0.95%	4.45%	21.00%
	Enjoy a UK Break	100	4.52%	17	0.77%	3.60%	17.00%
	Enjoy an Autumn UK Break Card	100	4.52%	22	1.00%	4.66%	22.00%
	TIC Requests	100	4.52%	52	2.35%	11.02%	52.00%
	Website Requests	100	4.52%	44	1.99%	9.32%	44.00%
Totals		2210	100%	472	21.36%	100%	

The conversion rate for 2008 was 21.36%, this was a slight decrease when compared to the 24.3% conversion rate achieved in 2007 and the 25.17% conversion rate achieved in 2006.

Conversion Rates Additional Information

Pembrokeshire 2008 Conversion Research Additional Information

- (a) A total number of **472** interviewed parties visited Pembrokeshire during 2008
- (b) The average number of people per party was **3.39**
- (c) The average number of nights stayed per party was **5.04**
- (d) Therefore, the number of visitor nights was **8,064.40**

Due to some people not being able to recall how much they spent during their holiday the following data does not include those that could not answer question 8

- (a) A total number of **231** parties visited Pembrokeshire during 2008, and managed to recall their spend
- (b) The average number of people per party was **3.06**
- (c) The average number of nights stayed per party was **5.06**
- (d) Therefore, the number of complete visitor nights was **3,576.71**
- (e) The average total spend per party was **£573.78**
- (f) The average spend per person, per day was **£37.06**
- (g) The total expenditure for this conversion research was **£132,552.93**

Analysis of Figures

The figures below should be read in conjunction with App 1 [table of statistics] & App 2 [explanation of figures].

1. Survey Number

There were 2210 people interviewed as part of the overall Survey. The aim was to achieve approximately 100 interviews for key media, allowing us a sensible volume of interviews on which to draw conclusions. As with all research of this nature it would be good to increase the sample size to further improve reliability, however this comes with obvious cost implications.

2. Survey visits

From the 2210 interviews, 472 people visited Pembrokeshire in 2008.

3. Conversion rate

The overall conversion rate [as shown on page 4] is 21%. While we are not at liberty to divulge conversion rates from other clients, while not 'exceptional', this is a 'good' conversion rate. Those who achieve higher are generally from areas with much stronger 'destination brands'.

The higher conversion rates come from the TIC and Website Requests [52.00% and 44% respectively], the Radio Times [25.98%] and Enjoy a Traditional British Holiday [25.00%]. However, the lower conversion rates were seen from www.catalogue-link.co.uk [10.00%], INFO [12.96%] and the Take a Break DM [14.00%], which all require further analysis.

While conversion rates are important to analyse, it is really the cost per conversion which offers the most useful feedback on the performance of each campaign element.

4. Cost of media

The total cost of the media was £64,426.35. Costs for the Telemarketing Questionnaire, TIC Requests, Website Requests and staff costs are not included in the research, but should be borne in mind when considering the 2009/10 media schedule.

Analysis of Figures cont...

5. Actual response

73,237 brochures were mailed as a result of the activities included in the media campaign, as outlined in this research. The largest proportion went through Axiom [20,262] and the Opinion Poll Survey-Jan/Feb [18,747] and the CIC booklet [6,342].

6. Responses converted

Of the 73,237 brochures mailed, 13,447.30 were converted into bookings.

7. Fulfilment cost & production cost

The total cost of producing and fulfilling the 73,237 brochure requests was £88,982.96. This equates to £1.215 for each brochure. The total cost of producing and fulfilling the brochure requests, minus the income received for the guide was £29,075.09, which equates to £0.397 for each brochure.

8. Cost per response

The best CPR achieved was for the CIC Booklet and Axiom, both coming in at only £0.63 per response generated. The next best was the Opinion Poll Survey- Jan/Feb achieving £0.75 per response. Other activity that achieved a CPR under £1 include INFO (£0.89) and Take a Break DM (£0.99). All of the others achieved figures below £4 per response.

9. Cost of media + fulfilment & brochure production

The total cost of the media, fulfilment and brochure production was £93,501.44. Please note that these costs include the design and production of the 2008 Holiday Guide, plus other associated costs. These costs have been offset by income received from advertising and partners etc.

10. Cost per response [including fulfilment & brochure production]

It is useful to include the fulfilment and brochure production costs to the normal CPR figures, as proportionally this can make a big difference. For example the Radio Times went up from £3.82 to £4.21, which takes it close to the £5 mark, which is generally considered to be a key benchmark figure, i.e. we should be able to spend our marketing budget in a better way to reduce the cost of generating brochure requests.

Analysis of Figures cont...

11. Cost per conversion

This is a key figure as it not only takes into account the above figure [10.], but also the conversion rate. Again, as a benchmark, £25 to generate a booking should be the target. The average cost per conversion for the media campaign was £8.69.

No activity in 2008 generated a cost per conversion over the £25 benchmark. The closest to this benchmark was the Radio Times [£16.22], which should be looked at again to see if this can be improved or whether it is worthwhile investing in this in 2009/10. The better performing ones include the TIC and Website Requests [£0.76 & £0.90 respectively], the Telemarketing Questionnaire [£2.09] and Axiom [£5.34].

12. ROI [day visits, staying visits, total and ratio]

The direct Return on Investment purely for day visits equated to a total of £249,457.65. The equivalent for staying visits was £7,313,106.05, giving a total ROI figure of **£7,562,563.70**

This figure has come from a direct spend of £93,501.44 [media + fulfilment & production - income], but does not include staff time. The average ROI ratio was £127.72, but the overall ROI was £80.88, i.e. for every £1 spent on the marketing campaign, £80.88 was generated into the Pembrokeshire tourism economy.

13. Value of Good Intentions [day visits, staying visits, total]

VGI is a figure used to highlight that although some people did not visit Pembrokeshire in 2008 after requesting a brochure, they indicated their intent to visit in 2009, 2010 or 2011. Thus, a proportion of these people have been 'positively influenced' by the campaign and this can be given a value.

The overall value for day visits was calculated at £28,579.22 and for staying visits at £5,732,701.75. [Note that this is over 2009, 2010 and 2011, not just 1 year]. The total VGI for the campaign has been calculated at **£5,761,280.97**

14. Overall campaign ROI

The return on investment, including the actual spend and VGI is **£13,323,844.67**. A not insignificant sum, from a media and fulfilment/production spend of £93,501.44.

15. Overall campaign ROI ratio

The overall campaign ROI, including value of good intentions was **£142.50**, i.e. for every £1 spent on the marketing campaign, £142.50 could be generated into the Pembrokeshire tourism economy.

Key Contacts

Bob Carter

Work: 01271 336000

Email: bob@carrierdirectmarketing.co.uk

Gary Lowthian

Work: 01904 628034

Email: gary@customermaze.com

Jennie Lowthian

Work: 01904 628034

Email: jennie@customermaze.com