



STRICTLY PRIVATE AND CONFIDENTIAL

Pembrokeshire Holiday Guide 2007

Media Campaign Effectiveness Research

Client: Pembrokeshire County Council

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# Background and Objectives

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Pembrokeshire County Council commissioned Carrier Direct Marketing and Customer Maze to research the effectiveness of the 2007 Pembrokeshire Holiday Guide.

This research was also carried out in 2006 and 2005. Where possible, this report will draw upon comparisons from the previous research findings.

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 titles are most effective in reaching visitors that ultimately book a holiday in the area.

# Methodology

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Customer Maze conducted 2,200 telephone interviews between the 17<sup>th</sup> December 2007 and the 18<sup>th</sup> January 2008. 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)

Daily Mail (DM)

Holiday Guide Finder (HGF)

Info (formerly info service) (INFO)

Planning A Holiday (PH)

Sunday Mirror BRA (SM)

Daily Mirror BRA (DMBRA)

Telemarketing Questionnaire (TQ)

Take A Break - Direct Mail (TBDM)

Consumer Info Centre Booklet (CIC)

The Gallery (TG)

Axciom Online Survey (AOS)

The UK Holiday Collection (UKHC)

Enjoy a Seaside Holiday Card (ESHC)

Enjoy A UK Break (EUKB)

Enjoy An Autumn Break Card (EABC)

The UK Autumn Breaks Collection (UKABC)

Enjoy A Traditional British Holiday CD (ETBH)

Opinion Poll Survey (OPS)

Where to go in Britain (WTGB)

Spring Wales Walking Campaign (VWDM)

Walk Visitwales.com Campaign (WVWC)

# Notes on Interpretation

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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 2005 and 2006 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 2007 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 2007?



In 2007, 24% of respondents visited Pembrokeshire, this is a slight decrease of 1% when compared to the 25% recorded in 2006.

28% visited in 2005.

## Q2: How many nights did you stay?

Q2 was only asked of respondents that visited Pembrokeshire in 2007, as stated in Q1. (Note the low bases for all categories)

|               | Day trip<br>% | 1 night<br>% | 2 – 4 ngts<br>% | 5 – 7 ngts<br>% | 8–14 ngts<br>% | 15–21 ngts<br>% | 22 ngts +<br>% | CR<br>% |
|---------------|---------------|--------------|-----------------|-----------------|----------------|-----------------|----------------|---------|
| RT (39)       | 5             | *            | 13              | 74              | 8              | *               | *              | *       |
| DM (24)       | 4             | 4            | 29              | 50              | 13             | *               | *              | *       |
| HGF (33)      | 18            | *            | 9               | 67              | *              | 6               | *              | *       |
| INFO (21)     | 24            | *            | 38              | 33              | 5              | *               | *              | *       |
| PH (28)       | *             | *            | 36              | 54              | 11             | *               | *              | *       |
| SM (32)       | 3             | *            | 25              | 63              | *              | *               | *              | 9       |
| DMBRA (30)    | 7             | *            | 27              | 63              | *              | 3               | *              | *       |
| TQ (28)       | 4             | 4            | 36              | 50              | 7              | *               | *              | *       |
| TBDM (23)     | 4             | *            | 17              | 57              | 22             | *               | *              | *       |
| CIC (30)      | 7             | *            | 27              | 57              | 3              | 3               | 3              | *       |
| TG (21)       | 10            | *            | 33              | 38              | 10             | 5               | 5              | *       |
| AOS (8)       | 13            | *            | 25              | 13              | 38             | *               | 13             | *       |
| UKHC (23)     | 22            | 4            | 26              | 39              | 4              | *               | *              | 4       |
| ESHC (12)     | 8             | *            | 17              | 67              | 8              | *               | *              | *       |
| EUKB (18)     | 28            | *            | 33              | 39              | *              | *               | *              | *       |
| EABC (19)     | 21            | 16           | 32              | 26              | *              | *               | 5              | *       |
| UKABC (13)    | 23            | *            | 38              | 31              | 8              | *               | *              | *       |
| ETBH (16)     | 6             | *            | 50              | 31              | 13             | *               | *              | *       |
| OPS (14)      | 14            | *            | 29              | 50              | 7              | *               | *              | *       |
| WTGB (38)     | 16            | 3            | 29              | 39              | 5              | *               | 5              | 3       |
| VWDM (32)     | 3             | 3            | 25              | 41              | 22             | 3               | *              | 3       |
| WVWC (33)     | 9             | 6            | 30              | 27              | 18             | 3               | 3              | 3       |
| Overall (535) | 10            | 2            | 27              | 48              | 8              | 1               | 1              | 1       |

\* 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 under half, 48% stayed in Pembrokeshire for 5-7 nights, 29% stayed for a short break of 1-4 nights and 10% visited for a day trip. Although these figures are very similar to 2006's, there is a slight increase in respondent visiting for a day trip or staying for a short break of 1-4 nights as opposed to 5-7 nights. The average length of stay in 2007 was 5.24 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.

### Q3. What type of accommodation did you use?

Q3 was only asked of respondents that visited Pembrokeshire in 2007, as stated in Q1. (Note the low bases for all categories)

|               | Hotel % | B&B/GHse % | SC % | C&C % | VFR % | Own a/c % | Hol park % | Youth Hstl % | Other % | CR % |
|---------------|---------|------------|------|-------|-------|-----------|------------|--------------|---------|------|
| RT (37)       | 16      | 22         | 46   | 11    | 5     | *         | *          | *            | *       | *    |
| DM (23)       | 35      | 13         | 17   | 26    | 4     | 4         | *          | *            | *       | *    |
| HGF (27)      | 19      | 7          | 48   | 19    | 4     | *         | *          | *            | 4       |      |
| INFO (16)     | 25      | 25         | 19   | 25    | *     | *         | *          | *            | 6       | *    |
| PH (28)       | 14      | 21         | 29   | 21    | 4     | 4         | *          | *            | 4       | 4    |
| SM (28)       | 39      | 14         | 25   | 14    | *     | 7         | *          | *            | *       | *    |
| DMBRA (28)    | 43      | 14         | 21   | 18    | *     | *         | 4          | *            | *       | *    |
| TQ (27)       | 30      | 19         | 26   | 4     | 15    | 4         | 4          | *            | *       | *    |
| TBDM (22)     | 27      | 14         | 18   | 27    | 14    | *         | *          | *            | *       | *    |
| CIC (28)      | 25      | 25         | 11   | 25    | 4     | 4         | 4          | *            | *       | 4    |
| TG (19)       | 32      | 16         | 37   | 5     | *     | 5         | 5          | *            | *       | *    |
| AOS (7)       | *       | 14         | 14   | 29    | 14    | 14        | *          | *            | 14      | *    |
| UKHC (17)     | 29      | 18         | 24   | 6     | 6     | 12        | *          | 6            | *       | *    |
| ESHC (11)     | 27      | 18         | 27   | 18    | *     | 9         | *          | *            | *       | *    |
| EUKB (13)     | 23      | 23         | 15   | 23    | *     | *         | 15         | *            | *       | *    |
| EABC (15)     | 27      | 40         | 7    | 20    | *     | 7         | *          | *            | *       | *    |
| UKABC (10)    | 20      | 30         | 30   | 10    | *     | 10        | *          | *            | *       | *    |
| ETBH (15)     | 20      | 27         | 7    | 20    | 13    | *         | 7          | *            | *       | 7    |
| OPS (12)      | 33      | *          | 25   | 33    | *     | *         | *          | *            | 8       | *    |
| WTGB (31)     | 23      | 19         | 19   | 26    | 3     | *         | 3          | *            | 6       | *    |
| VWDM (30)     | 10      | 17         | 27   | 40    | 7     | *         | *          | *            | *       | *    |
| WVWC (29)     | 10      | 7          | 21   | 48    | 7     | *         | *          | 3            | 3       | *    |
| Overall (473) | 24      | 18         | 25   | 22    | 5     | 3         | 2          | 0            | 2       | 1    |

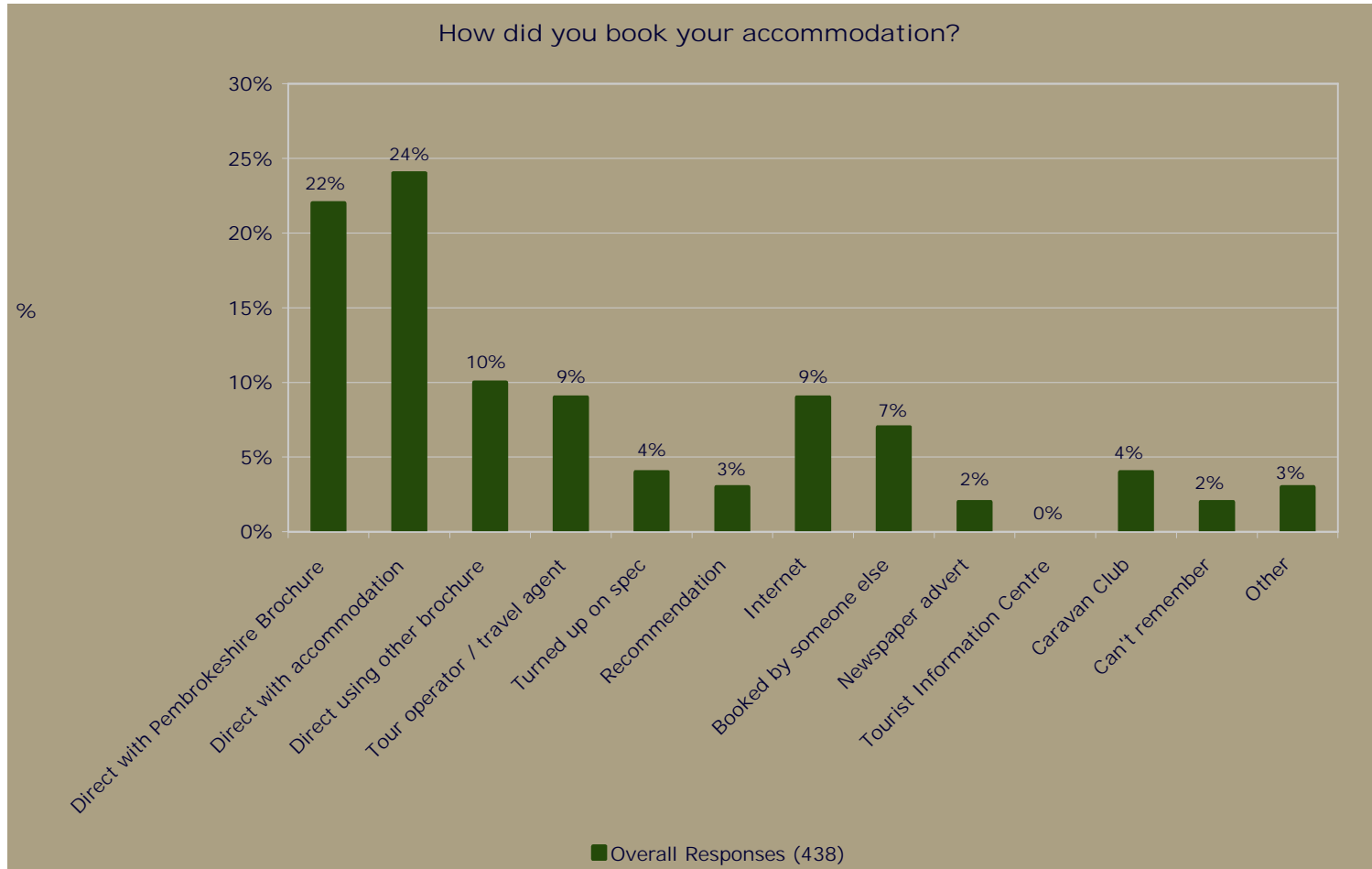
\* Denotes a value of less than one percent but has a value greater than zero

Interestingly, the same types of accommodation were popular in 2007 as in 2006 with 25% choosing 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.

2007 has seen a slight increase of people choosing to stay in B&B/Guesthouse accommodation with 18%, as opposed to 16% in 2006.

## Q4. How did you book your accommodation?

Q4 was only asked of respondents that visited Pembrokeshire in 2007, as stated in Q1.



Respondents indicated that the most popular way to book their accommodation was directly with the accommodation provider with 24% stating this. 22% booked their accommodation using the Pembrokeshire brochure. This shows a significant change in the pattern that has emerged over the past couple of years where the use of the Pembrokeshire brochure declined.

In 2006, 41% booked directly with the accommodation provider and only 16% used the Pembrokeshire brochure.

2007 has also seen a slight decline in the use of the Internet, with 9% using it to book their accommodation in 2007, as opposed to 12% in 2006.

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



## Q5: How many people were there in your party?

Q5 was only asked of respondents that Pembroke in 2007, as stated in Q1. (Note the low bases for all categories)

|               | 1 person % | 2 people % | 3 people % | 4 people % | 5 people % | 6-10 people % | 11-20 people % | 21 people + % | Refused % | CR % |
|---------------|------------|------------|------------|------------|------------|---------------|----------------|---------------|-----------|------|
| RT (39)       | 3          | 62         | 5          | 15         | 10         | *             | 3              | 3             | *         | *    |
| DM (24)       | 8          | 71         | 8          | 8          | *          | 4             | *              | *             | *         | *    |
| HGF (33)      | 9          | 55         | 3          | 12         | 9          | 6             | 3              | 3             | *         | *    |
| INFO (21)     | *          | 52         | 10         | 24         | *          | 14            | *              | *             | *         | *    |
| PH (28)       | 4          | 64         | 11         | 14         | *          | 7             | *              | *             | *         | *    |
| SM (32)       | *          | 56         | 3          | 9          | 9          | 19            | *              | 3             | *         | *    |
| DMBRA (30)    | 3          | 73         | 3          | 10         | 7          | *             | 3              | *             | *         | *    |
| TQ (28)       | 7          | 54         | 7          | 7          | 4          | 4             | 11             | 4             | 4         | *    |
| TBDM (23)     | *          | 70         | 9          | 13         | *          | 4             | *              | 4             | *         | *    |
| CIC (30)      | 7          | 67         | *          | 17         | 3          | 3             | *              | 3             | *         | *    |
| TG (21)       | 5          | 38         | 14         | 29         | 5          | 5             | 5              | *             | *         | *    |
| AOS (8)       | 25         | 13         | 13         | 13         | *          | 25            | 13             | *             | *         | *    |
| UKHC (23)     | 9          | 52         | 4          | 17         | *          | 4             | *              | 13            | *         | *    |
| ESHC (12)     | 8          | 33         | 8          | 33         | *          | 17            | *              | *             | *         | *    |
| EUKB (18)     | 6          | 67         | 6          | 6          | 11         | 6             | *              | *             | *         | *    |
| EABC (19)     |            | 58         | 5          | 21         | *          | 16            | *              | *             | *         | *    |
| UKABC (13)    | *          | 69         | 15         | 8          | 8          | *             | *              | *             | *         | *    |
| ETBH (16)     | 6          | 69         | 13         | 6          | *          | 6             | *              | *             | *         | *    |
| OPS (14)      | *          | 50         | 14         | 21         | *          | 7             | *              | 7             | *         | *    |
| WTGB (38)     | 3          | 68         | 5          | 13         | *          | 8             | 3              | *             | *         | *    |
| VWDM (32)     | *          | 72         | 6          | 9          | *          | *             | 3              | 9             | *         | *    |
| WVWC (33)     | 3          | 48         | 15         | 18         | 3          | 9             | *              | 3             | *         | *    |
| Overall (535) | 4          | 60         | 7          | 14         | 4          | 7             | 2              | 3             | 0         | *    |

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

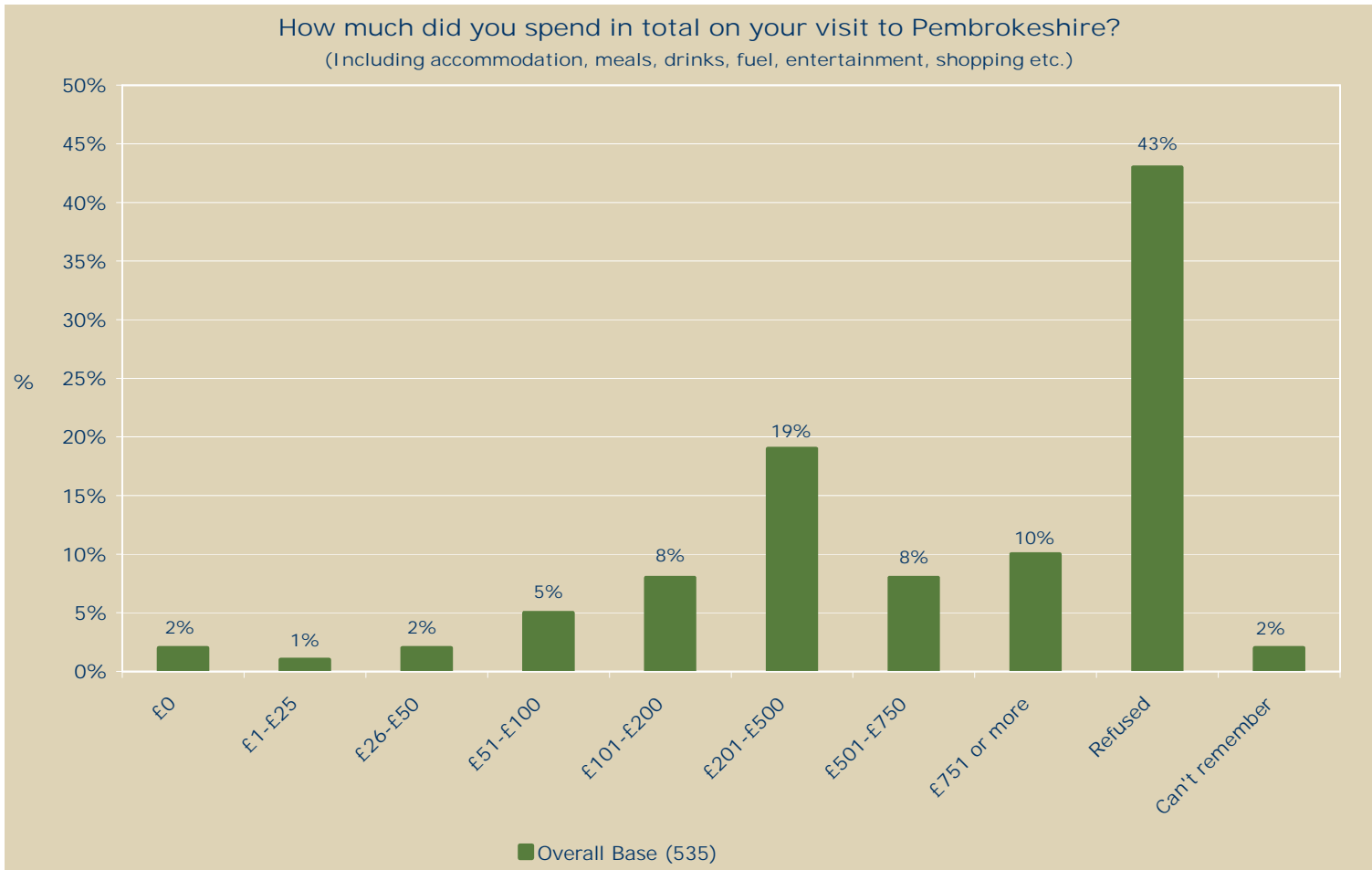
60% of respondents visited Pembroke in 2007 in a party size of two people and a further 14% visited in a party size of 4 people. The average number of people per visit in 2007 was 3.35.

In 2006, 64% of respondents visited in a party size of two people and again, 14% visited in a party size of 4 people, reflecting a very similar pattern at that of 2006 and 2005, where the most popular party size was again two people with 51%.

Q6: How much did you spend in total on your visit to Pembrokeshire? (Including accommodation, meals, drinks, fuel, entertainment, shopping etc.)

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Q6 was only asked of respondents that visited Pembrokeshire in 2007, as stated in Q1.



Getting 'spend' data is a real challenge in research with most respondents choosing to refuse to offer information (43% overall in this case).

19% of those respondents that did provide information stated that they spent a total of £201 to £500, per trip. 10% stated that they spent £751 or more, in total, per trip, whereas only 10% 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 2007 was £53.48.

For day visitors, the average spend per person, per day in 2007 was £29.55.

## Q7: What was it about Pembrokeshire that persuaded you to visit?

Q7 was only asked of respondents that visited Pembrokeshire in 2007, as stated in Q1 (Note the low bases for all categories)

|               | Nothing in part % | Sightseeing % | Beaches coastline % | Walking % | Peace & Quiet % | Repeat Visitor % | VFR % | Events % | Attraction % | Never been before % | CR % | Other % |
|---------------|-------------------|---------------|---------------------|-----------|-----------------|------------------|-------|----------|--------------|---------------------|------|---------|
| RT (39)       | 8                 | 8             | 21                  | *         | 10              | 18               | 10    | 3        | *            | 18                  | 3    | 3       |
| DM (24)       | *                 | 17            | 21                  | *         | *               | 42               | 8     | *        | *            | 13                  | *    | *       |
| HGF (33)      | 3                 | 6             | 21                  | 12        | 12              | 21               | *     | 3        | *            | 21                  | *    | *       |
| INFO (21)     | *                 | 19            | 24                  | 5         | 5               | 10               | 14    | *        | 10           | *                   | 5    | 10      |
| PH (28)       | *                 | 4             | 32                  | 4         | 11              | 39               | 4     | *        | *            | *                   | *    | 7       |
| SM (32)       | 6                 | 16            | 13                  | *         | 13              | 38               | *     | *        | 3            | 13                  | *    | *       |
| DMBRA (30)    | 7                 | 7             | 40                  | *         | 3               | 23               | 7     | *        | 3            | 7                   | *    | 3       |
| TQ (28)       | 4                 | 11            | 14                  | *         | 4               | 29               | 21    | 4        | *            | 7                   | *    | 7       |
| TBDM (23)     | 9                 | 4             | 39                  | 4         | 4               | 26               | 9     | *        | *            | 4                   | *    | *       |
| CIC (30)      | 3                 | 7             | 37                  | 3         | *               | 13               | 10    | *        | *            | 17                  | *    | 10      |
| TG (21)       | *                 | 14            | 14                  | *         | 5               | 33               | 5     | *        | *            | 19                  | 5    | 5       |
| AOS (8)       | *                 | *             | 13                  | *         | 13              | 25               | 13    | *        | *            | *                   | *    | 38      |
| UKHC (23)     | 9                 | 9             | 17                  | 4         | 4               | 30               | 9     | *        | 4            | 4                   | *    | 9       |
| ESHC (12)     | 8                 | 8             | 17                  | *         | *               | 33               | 8     | *        | 8            | 17                  | *    | *       |
| EUKB (18)     | *                 | 11            | 11                  | *         | 17              | 33               | *     | *        | *            | 17                  | *    | 11      |
| EABC (19)     | 11                | 5             | 26                  | 5         | 5               | 21               | 21    | *        | 5            | *                   | *    | *       |
| UKABC (13)    | 15                | 31            | 15                  | 15        | *               | *                | 8     | *        | 8            | 8                   | *    | *       |
| ETBH (16)     | 13                | *             | 6                   | 6         | 6               | 44               | 19    | *        | *            | *                   | *    | 6       |
| OPS (14)      | *                 | *             | 36                  | *         | 7               | 21               | 7     | *        | *            | 7                   | *    | 21      |
| WTGB (38)     | 3                 | 3             | 37                  | 5         | 8               | 8                | 8     | *        | 3            | 8                   | *    | 18      |
| VWDM (32)     | *                 | *             | 38                  | 13        | 9               | 19               | 9     | 3        | *            | *                   | *    | 9       |
| WVWC (33)     | *                 | 3             | 55                  | *         | *               | 15               | 9     | *        | 3            | 3                   | *    | 12      |
| Overall (535) | 4                 | 8             | 27                  | 4         | 6               | 24               | 9     | 1        | 2            | 9                   | 1    | 7       |

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

Over a quarter (27%) of respondents that visited Pembrokeshire in 2007 stated that they were persuaded to visit because of the beaches and coastline, this was closely followed by 24% stating that they were repeat visitors. This is 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.

## Q8: Please specify the 'other' reason why you decided to visit Pembrokeshire

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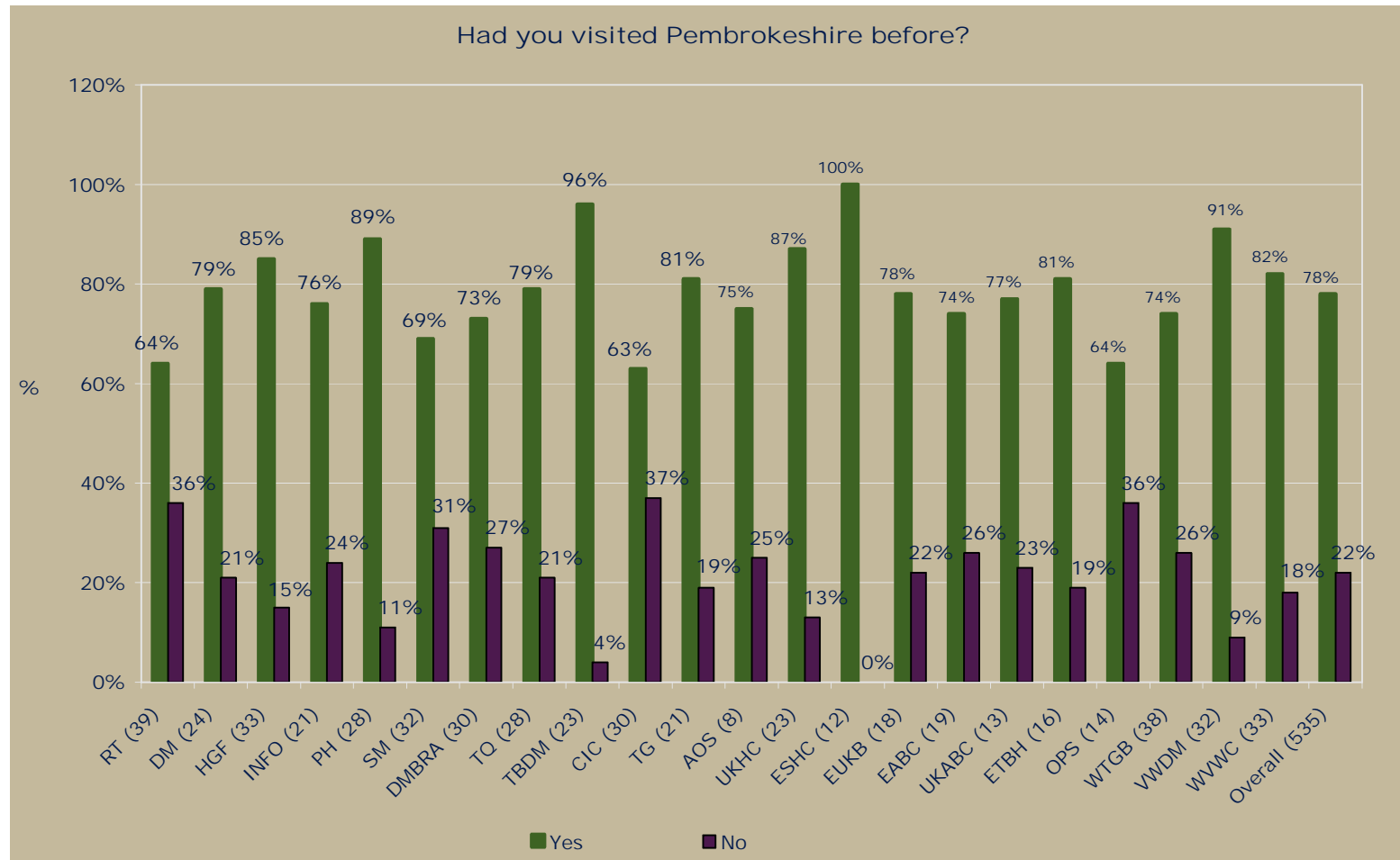
Q8 was only asked of respondents that visited Herefordshire in 2007, as stated in Q1 but stated 'other' in Q7.

37 respondents stated 'Other' as their main reason for visiting Pembrokeshire in 2007. Respondents were then asked to specify what their other reasons were. The following reasons were provided;

|  |   |
|--|---|
| 5 x Working Visits                       | Just a lovely area                                  |
| Bird watching                            | Just fantastic and brilliant                        |
| Bowling tour                             | Just love the area                                  |
| Change of place                          | Live 5 minutes away                                 |
| Close distance and lovely area           | nice community                                      |
| Close to place of residence              | On way to Ireland                                   |
| Easy to get too                          | On way to another destination                       |
| Feels like home                          | Passed through on way to Ireland- Convenience       |
| Funeral                                  | Recommended   |
| Golfing trip                             | 4 x Scenery   |
| Hadn't been back to Wales in a few years | Local dishes  |
| Hadn't been for 40 years                 | Mountains   |
| Hadn't been for a while                  | Came from there and were revisiting home            |
| Have caravan and go most weekends        | They drove through                                  |
| Hotel good                               | Very beautiful, had seen it a number of times on TV |
| Interesting and friendly people          | Was traveling through Wales anyway                  |
|  | Word of mouth                                       |

## Q9: Had you visited Pembrokeshire before?

Q9 was only asked of respondents that visited Pembrokeshire in 2007, as stated in Q1 (Note the low bases for all categories)



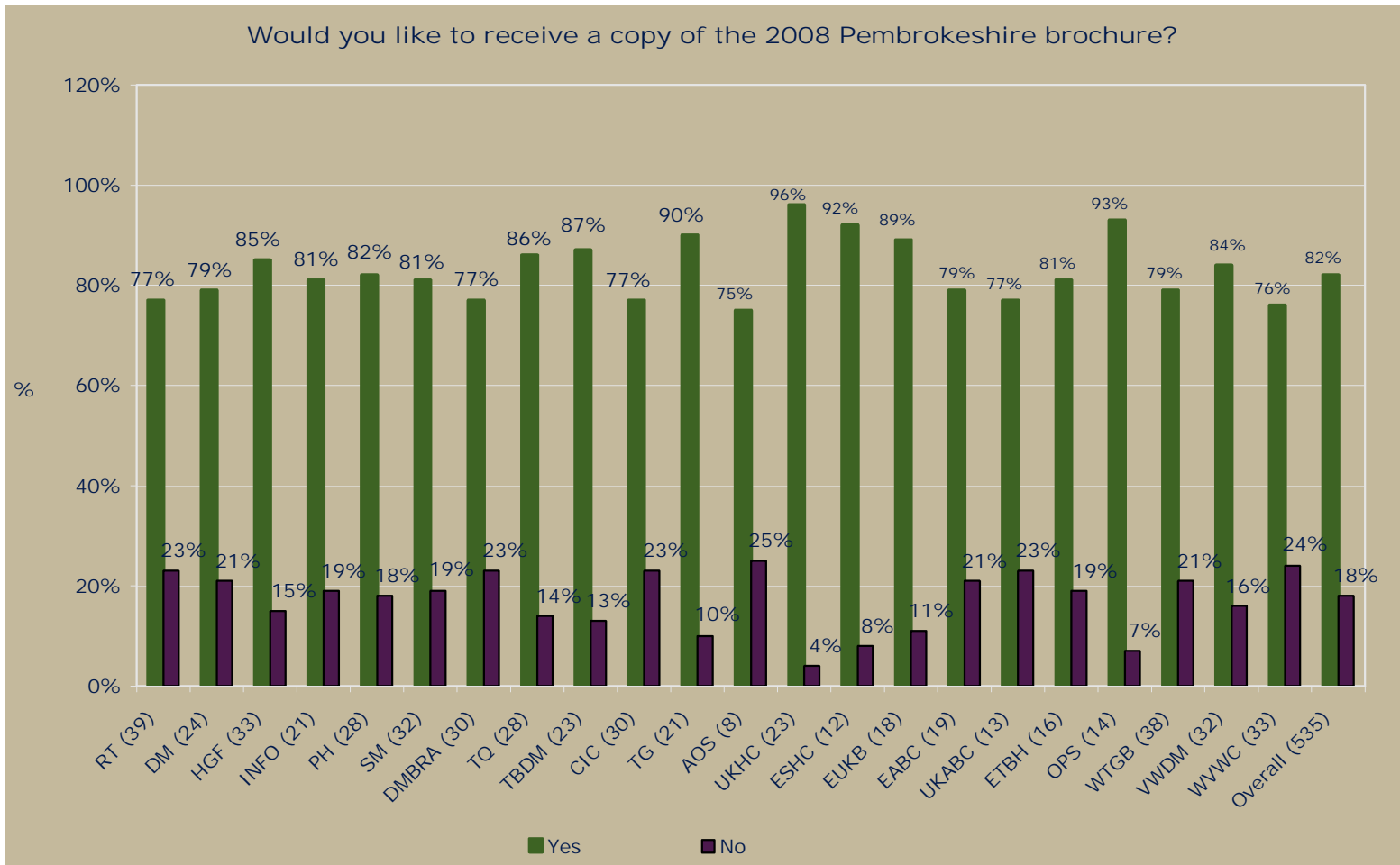
78% of respondents that visited Pembrokeshire in 2007 stated that they had visited before, which is a slight increase on the 75% recorded in 2006.

66% stated that they had visited before in 2005 highlighting an emerging pattern of more repeat visitors.

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

Q10: Would you like to receive a copy of the 2008 Pembrokeshire brochure?

Q10 was only asked of respondents that visited Pembrokeshire in 2007, as stated in Q1. (Note the low bases for all categories)



The majority of all media groups said that they would like to receive a copy of the 2008 Pembrokeshire brochure.

Overall, 82% stated this, which, encouragingly, was the same in 2006.

In total, 440 requests for the 2008 brochure have been received as a result of this question.

## Q11: How likely are you to visit Pembrokeshire again in the future?

Q11 was only asked of respondents that visited Pembrokeshire in 2007, as stated in Q1. (Note the low bases for all categories)

|               | Very Likely<br>% | Quite Likely<br>% | Neither Likely nor<br>Unlikely<br>% | Not Likely<br>% | Not at all Likely<br>% | Don't Know<br>% |
|---------------|------------------|-------------------|-------------------------------------|-----------------|------------------------|-----------------|
| RT (39)       | 59               | 28                | 8                                   | *               | 5                      | *               |
| DM (24)       | 29               | 54                | 13                                  | 4               | *                      | *               |
| HGF (33)      | 39               | 48                | 3                                   | 3               | 3                      | 3               |
| INFO (21)     | 67               | 19                | 14                                  | *               | *                      | *               |
| PH (28)       | 50               | 32                | 11                                  | 4               | *                      | 4               |
| SM (32)       | 53               | 25                | 9                                   | *               | 3                      | 9               |
| DMBRA (30)    | 50               | 37                | 7                                   | 7               | *                      | *               |
| TQ (28)       | 43               | 43                | 7                                   | 4               | *                      | 4               |
| TBDM (23)     | 61               | 26                | 4                                   | 4               | *                      | 4               |
| CIC (30)      | 60               | 27                | 10                                  | 3               | *                      | *               |
| TG (21)       | 71               | 24                | 5                                   | *               | *                      | *               |
| AOS (8)       | 75               | 25                | *                                   | *               | *                      | *               |
| UKHC (23)     | 70               | 17                | 4                                   | 4               | *                      | 4               |
| ESHC (12)     | 42               | 50                | *                                   | 8               | *                      | *               |
| EUKB (18)     | 78               | 11                | 6                                   | *               | *                      | 6               |
| EABC (19)     | 53               | 42                | 5                                   | *               | *                      | *               |
| UKABC (13)    | 54               | 31                | 8                                   | *               | *                      | 8               |
| ETBH (16)     | 56               | 38                | *                                   | *               | 6                      | *               |
| OPS (14)      | 50               | 43                | *                                   | 7               | *                      | *               |
| WTGB (38)     | 61               | 37                | *                                   | 3               | *                      | *               |
| VWDM (32)     | 66               | 31                | 3                                   | *               | *                      | *               |
| WVWC (33)     | 61               | 36                | 3                                   | *               | *                      | *               |
| Overall (535) | 56               | 33                | 6                                   | 2               | 1                      | 2               |

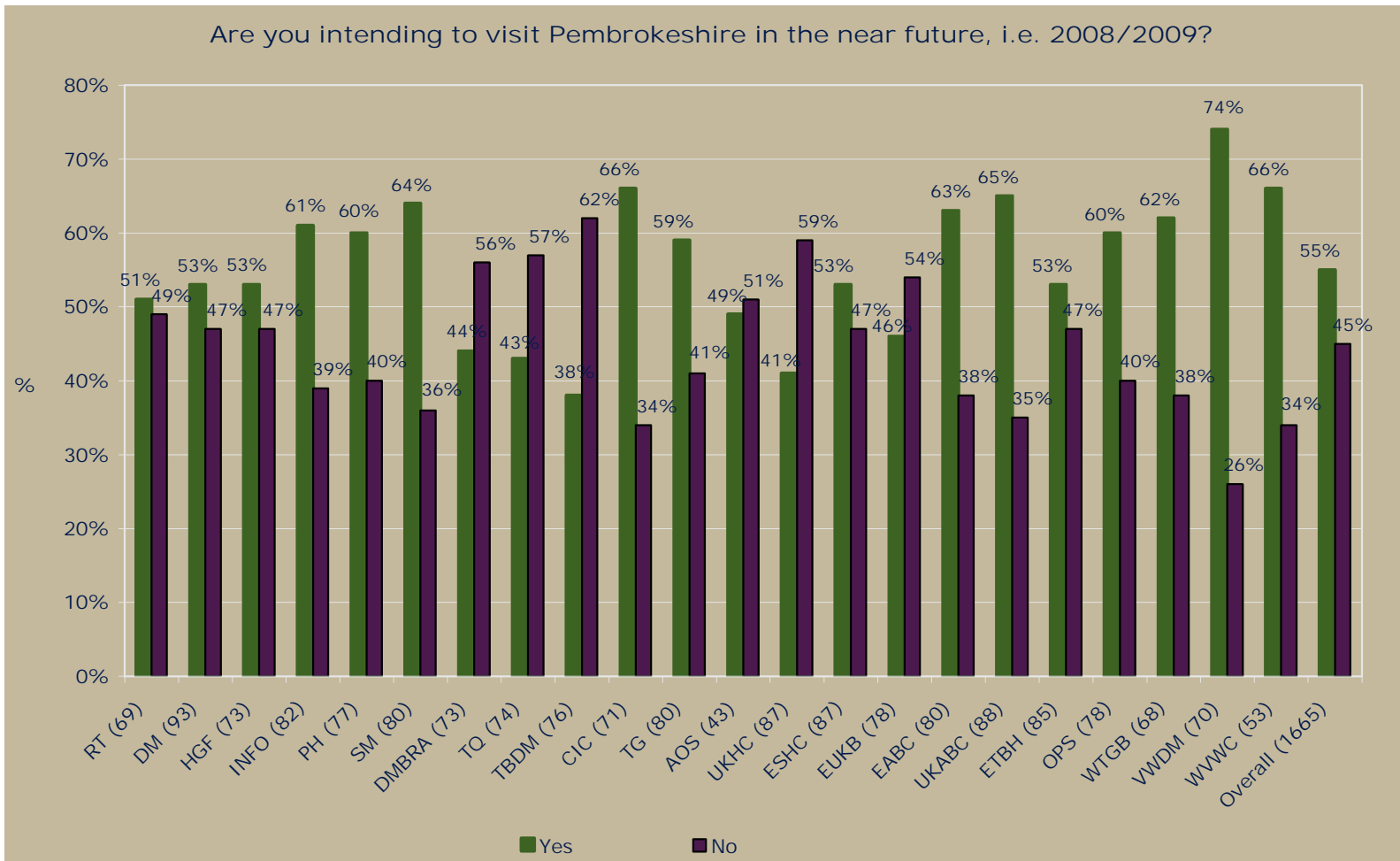
\* Denotes a value of less than one percent but has a value greater than zero

Please note there are no comparisons to 2006 as this question was not asked in the 2006 research.

56% of respondents that visited Pembrokeshire in 2007 stated that they were very likely to visit again in the future with a further 33% stating that they were quite likely to visit again. Encouragingly, only 3% said that they were not or not at all likely to visit again.

## Q12: Are you intending to visit Pembrokeshire in the near future? i.e. 2008 / 2009?

Q12 was only asked of respondents that did NOT visit Pembrokeshire in 2007, as stated in Q1.  
(Note the low bases for all categories.)



55% of respondents that did not visit Pembrokeshire in 2007 said that they intended to visit in the near future.

74% of those that responded via the VW Direct Mail stated that they intended to visit in the near future, whereas only 38% of those that responded via the Take a Break Direct Mail said that they intended to visit in the near future

Again, please note there are no comparisons to 2006 as this question was not asked in the 2006 research.



### Q13: How many nights will you stay?

Q13 was only asked of respondents that did NOT visit Pembrokeshire in 2007, as stated in Q1 but intend to visit in 2008/2009, as stated in Q12. (Note the low bases for all categories.)

|               | DT % | 1n % | 2n % | 3n % | 4n % | 5n % | 6n % | 7n % | 8n % | 9n % | 10n % | 11n % | 12n % | 13n % | 14n % | 15+n % | DK % |
|---------------|------|------|------|------|------|------|------|------|------|------|-------|-------|-------|-------|-------|--------|------|
| RT (35)       | *    | *    | *    | 11   | 20   | 6    | *    | 51   | *    | *    | 3     | *     | *     | *     | 9     | *      | *    |
| DM (49)       | *    | *    | 6    | 14   | 8    | 10   | 2    | 41   | *    | *    | 2     | *     | *     | *     | *     | *      | 16   |
| HGF (39)      | 3    | *    | 3    | 8    | 18   | 3    | *    | 46   | *    | 3    | *     | *     | *     | *     | 3     | *      | 15   |
| INFO (50)     | *    | *    | 6    | 14   | 12   | 12   | 2    | 30   | *    | 2    | *     | *     | *     | *     | 6     | *      | 16   |
| PH (46)       | *    | 2    | 4    | 7    | 11   | 11   | 4    | 41   | *    | *    | *     | *     | *     | *     | 9     | 2      | 9    |
| SM (51)       | 2    | *    | 8    | 6    | 8    | 8    | *    | 49   | *    | *    | *     | *     | *     | *     | *     | *      | 20   |
| DMBRA (32)    | 3    | *    | *    | *    | 3    | 13   | *    | 56   | *    | *    | *     | *     | *     | *     | 3     | *      | 22   |
| TQ (32)       | *    | *    | *    | 16   | 19   | 19   | *    | 31   | *    | *    | 3     | *     | *     | *     | 6     | *      | 6    |
| TBDM (29)     | *    | *    | *    | 14   | 14   | 10   | *    | 34   | *    | *    | *     | *     | *     | *     | 7     | *      | 21   |
| CIC (47)      | *    | *    | *    | 6    | 6    | 13   | *    | 60   | *    | *    | *     | *     | *     | *     | 2     | *      | 13   |
| TG (47)       | *    | *    | 6    | 21   | 6    | 4    | *    | 32   | *    | *    | 4     | *     | *     | *     | 2     | *      | 23   |
| AOS (21)      | *    | *    | 5    | 5    | 5    | 5    | *    | 43   | 5    | *    | *     | *     | *     | *     | 10    | *      | 24   |
| UKHC (36)     | *    | *    | *    | 17   | 14   | 8    | *    | 42   | *    | *    | 3     | *     | *     | *     | 6     | *      | 11   |
| ESHC (46)     | 2    | *    | 2    | 4    | 9    | 2    | *    | 61   | *    | *    | *     | *     | *     | *     | 2     | *      | 17   |
| EUKB (36)     | *    | *    | 3    | 11   | 11   | 8    | *    | 50   | *    | *    | *     | *     | *     | *     | 3     | *      | 14   |
| EABC (50)     | *    | *    | 6    | 22   | 16   | 4    | 2    | 36   | *    | *    | *     | *     | *     | *     | 8     | *      | 6    |
| UKABC (57)    | *    | *    | 7    | 5    | 7    | 5    | 4    | 42   | *    | *    | *     | *     | *     | *     | 5     | *      | 25   |
| ETBH (45)     | *    | *    | 16   | 13   | 11   | 11   | 2    | 42   | *    | *    | *     | *     | *     | *     | 2     | *      | 2    |
| OPS (47)      | 2    | *    | 9    | 13   | 17   | 4    | 4    | 38   | *    | *    | 6     | *     | *     | *     | 4     | *      | 2    |
| WTGB (42)     | *    | 2    | 2    | 10   | 12   | 2    | *    | 60   | *    | *    | 2     | *     | *     | *     | 7     | 2      | *    |
| VWDM (52)     | 2    | *    | 6    | 8    | 10   | 4    | *    | 54   | *    | *    | 2     | *     | *     | *     | 13    | *      | 2    |
| VVWC (35)     | *    | *    | 3    | 11   | 6    | 6    | *    | 54   | 3    | *    | *     | *     | 3     | *     | 3     | *      | 11   |
| Overall (924) | 1    | 0    | 5    | 11   | 11   | 7    | 1    | 45   | 0    | 0    | 1     | *     | 0     | *     | 5     | 0      | 12   |

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

DK=Don't Know

Please note there are no comparisons to 2006 as this question was not asked in the 2006 research.

Just under half (45%) of respondents that did not visit Pembrokeshire in 2007 but indicated that they would visit in the near future stated that they would stay for 7 nights. A further 27% stated that they intended to stay for a short break of 2-4 nights.

## Q14: How many people will there be in your party?

Q14 was only asked of respondents that did NOT visit Pembrokeshire in 2007, as stated in Q1 but intend to visit in 2008/2009, as stated in Q12. (Note the low bases for all categories.)

|               | 1 person % | 2 people % | 3 people % | 4 people % | 5 people % | 6-10 people % | 11-20 people % | 21 people + % | Refused % | CR % |
|---------------|------------|------------|------------|------------|------------|---------------|----------------|---------------|-----------|------|
| RT (35)       | 14         | 66         | 3          | 11         | 3          | *             | 3              | *             | *         | *    |
| DM (49)       | 2          | 80         | 8          | 4          | *          | *             | 2              | *             | *         | 4    |
| HGF (39)      | 5          | 69         | 5          | 13         | 5          | 3             | *              | *             | *         | *    |
| INFO (50)     | 6          | 68         | 10         | 4          | 8          | 2             | 2              | *             | *         | *    |
| PH (46)       | 2          | 74         | 11         | 9          | *          | *             | *              | 2             | 2         | *    |
| SM (51)       | -          | 76         | 8          | 8          | *          | *             | *              | 4             | 4         | *    |
| DMBRA (32)    | -          | 97         | 3          | *          | *          | *             | *              | *             | *         | *    |
| TQ (32)       | 13         | 56         | 16         | 13         | 3          | *             | *              | *             | *         | *    |
| TBDM (29)     | 3          | 72         | 3          | 7          | *          | *             | 3              | *             | 3         | 7    |
| CIC (47)      | 4          | 70         | 11         | 13         | 2          | *             | *              | *             | *         | *    |
| TG (47)       | 6          | 68         | 4          | 4          | 4          | 4             | *              | *             | 4         | 4    |
| AOS (21)      | 10         | 24         | 10         | 33         | 5          | 14            | *              | *             | 5         | *    |
| UKHC (36)     | 3          | 86         | 6          | 6          | *          | *             | *              | *             | *         | *    |
| ESHC (46)     | 2          | 76         | 4          | 15         | 2          | *             | *              | *             | *         | *    |
| EUKB (36)     | *          | 81         | 2          | 17         | *          | *             | *              | *             | *         | *    |
| EABC (50)     | *          | 78         | 10         | 8          | 2          | *             | *              | 2             | *         | *    |
| UKABC (57)    | 7          | 72         | 4          | 9          | 2          | 4             | 2              | *             | 2         | *    |
| ETBH (45)     | 4          | 84         | *          | 11         | *          | *             | *              | *             | *         | *    |
| OPS (47)      | 9          | 70         | 4          | 11         | *          | 6             | *              | *             | *         | *    |
| WTGB (42)     | 7          | 79         | 5          | 2          | 2          | 5             | *              | *             | *         | *    |
| VWDM (52)     | 4          | 79         | 4          | 10         | 2          | 2             | *              | *             | *         | *    |
| WVWC (35)     | *          | 51         | 6          | 26         | 14         | 3             | *              | *             | *         | *    |
| Overall (924) | 4          | 73         | 6          | 10         | 2          | 2             | 1              | 0             | 1         | 1    |

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

DK=Don't Know

Please note there are no comparisons to 2006 as this question was not asked in the 2006 research.

72% of those respondents that did not visit in 2007 but intend to visit in the near future stated that they would visit in a party size of 2 people. A further 10% stated that would travel in a party size of 4 people.

Q15: Where did you go on holiday last year? (Base:1665)

Q15 was only asked of respondents that did NOT visit Pembrokeshire in 2007, as stated in Q1.

| Area             | %  | Area        | %  | Area        | % | Area       | % |
|------------------|----|-------------|----|-------------|---|------------|---|
| No holiday taken | 29 | York        | 1  | Scarborough | 0 | Bude       | 0 |
| Abroad           | 27 | Bournemouth | 1  | St Ives     | 2 | Dorchester | 0 |
| Llandudno        | 1  | Eastbourne  | 0  | Torquay     | 2 | Wales      | 6 |
| Weymouth         | 0  | Newquay     | 0  | Falmouth    | 1 | Sidmouth   | 0 |
| Lake District    | 2  | Other       | 27 |             |   |            |   |

The table above shows where respondents chose to visit in 2007 as opposed to visiting Pembrokeshire. The findings of the 2006 research showed that 28% did not go on holiday and 21% went abroad, similar to the figures recorded for 2007.

450 respondents (27%) selected 'other' when asked where they went on holiday in 2007. Those respondents were then asked to specify where they went and those destinations can be seen over the next page.

Q16: Please specify the 'other' place that you went on holiday last year?

Q16 was only asked of respondents that did NOT visit Pembrokeshire in 2007, as stated in Q1 and stated 'other' to Q15.

450 respondents (27%) selected 'other' when asked where they went on holiday in 2007. Those respondents were then asked to specify where they went and the following destinations were recorded.

| Area            | Area           | Area          | Area             | Area               |
|-----------------|----------------|---------------|------------------|--------------------|
| All over        | Cumbria        | Hastings      | Mid Wales        | Swanage            |
| Anglesey        | Dartmoor       | Herefordshire | Minehead         | Sydmouth           |
| Ashburton       | Dawlish        | Hunstantan    | New Forest       | The Lane Peninsula |
| Barmouth        | Derbyshire     | Ilfracombe    | Norfolk          | Tow                |
| Bath            | Devon          | Ireland       | North Cornwall   | Wales              |
| Blackpool       | Dorset         | isle of man   | North Devon      | Warwick            |
| Bournemouth     | Dublin         | Isle of White | North Norfolk    | West Country       |
| Bran Sands      | East Coast     | Jersey        | North Wales      | Weston super Mare  |
| Bristol         | East Sussex    | Kent          | North Yorkshire  | Whitby             |
| Cambridge       | East Yorkshire | Lake District | Northern Ireland | Wiltshire          |
| Cape Roth       | Eastbourne     | Lancashire    | Northumberland   | Winchelsea         |
| Cardiff         | Edinburgh      | Lincolnshire  | Northumbria      | Woolacombe         |
| Cardigan        | Essex          | Littlehampton | North Wales      | Worcester          |
| Carmarthenshire | Exeter         | Liverpool     | Nottingham       | Yorkshire          |
| Channel Islands | Exmoor         | London        | Near Tenby       |                    |
| Chester         | Glastonbury    | Longleat      | Oxford           |                    |
| Clacton         | Gower          | Looe          | Oxfordshire      |                    |
| Conway bay      | Great Yarmouth | Lowestoft     | Padstow          |                    |
| Cornwall        | Guernsey       | Lynmouth      | Paignton         |                    |
| Cotswolds       | Harrogate      | Matlock       | Peak District    |                    |

Of the areas listed above, the most popular were Cornwall, Devon, North Wales, Yorkshire and Scotland.

## Q17 & Q18: How did you book your accommodation?

Q17 & Q18 was only asked of respondents that did NOT visit Pembrokeshire in 2007, 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 (69)        | 17  | 26  | 16  | 14  | 1   | *   | 9   | 3   | 6   | *   | 1   | 1   | *   | *   | 1   | 3   | *   |
| DM (93)        | 25  | 6   | 24  | 11  | 8   | 2   | 12  | 5   | 3   | 1   | 1   | *   | *   | *   | 1   | *   | 1   |
| HGF (73)       | 23  | 15  | 25  | 10  | 1   | 3   | 10  | 1   | 3   | 1   | *   | 3   | *   | *   | *   | 1   | 4   |
| INFO (82)      | 29  | 9   | 17  | 7   | 2   | 4   | 18  | 7   | *   | 2   | *   | *   | *   | *   | *   | 2   | 1   |
| PH (77)        | 21  | 12  | 17  | 13  | 5   | *   | 10  | 4   | 4   | 1   | 1   | 1   | *   | *   | *   | 8   | 3   |
| SM (80)        | 28  | 28  | 16  | 9   | 5   | *   | 3   | 3   | 4   | 1   | *   | *   | *   | *   | *   | 3   | 3   |
| DMBRA (73)     | 30  | 26  | 8   | 14  | 5   | 1   | 3   | *   | 4   | 1   | 3   | 3   | *   | *   | *   | 1   | *   |
| TQ (74)        | 26  | 15  | 24  | 12  | 3   | 3   | 8   | 1   | 3   | *   | 1   | *   | *   | *   | *   | 4   | *   |
| TBDM (76)      | 32  | 20  | 20  | 4   | 3   | 3   | 4   | 1   | 4   | *   | 3   | *   | *   | *   | 1   | 4   | 3   |
| CIC (71)       | 38  | 6   | 13  | 6   | 10  | 1   | 13  | *   | 10  | *   | *   | 1   | *   | *   | 1   | *   | 1   |
| TG (80)        | 44  | 14  | 13  | 5   | 5   | *   | 11  | 3   | 4   | *   | *   | *   | *   | 1   | *   | *   | 1   |
| AOS (43)       | 26  | *   | 16  | 12  | 2   | 2   | 30  | 2   | 5   | *   | *   | *   | *   | *   | 2   | *   | 2   |
| UKHC (87)      | 38  | 6   | 17  | 13  | 3   | 2   | 10  | 5   | 1   | *   | *   | 1   | *   | *   | 1   | 1   | 1   |
| ESHC (87)      | 30  | 14  | 15  | 14  | 5   | 3   | 8   | 1   | 6   | *   | *   | *   | *   | *   | *   | 3   | 1   |
| EUKB (78)      | 22  | 9   | 24  | 14  | 1   | 3   | 17  | 4   | 1   | *   | *   | 1   | 1   | *   | *   | 1   | 1   |
| EABC (80)      | 24  | 6   | 21  | 5   | 9   | 4   | 20  | 5   | *   | 1   | *   | 3   | *   | 1   | 1   | *   | *   |
| UKABC (88)     | 32  | 14  | 17  | 7   | 7   | 3   | 9   | *   | 2   | *   | 1   | 2   | *   | *   | 1   | 5   | *   |
| ETBH (85)      | 27  | 7   | 19  | 15  | 4   | 2   | 8   | *   | 4   | 1   | *   | *   | 1   | *   | 1   | 2   | 8   |
| OPS (78)       | 29  | 8   | 17  | 9   | 6   | 1   | 21  | 4   | 1   | *   | *   | *   | *   | *   | 1   | *   | 3   |
| WTGB (68)      | 21  | 12  | 22  | 12  | 10  | *   | 7   | 3   | 4   | *   | *   | 4   | 3   | *   | *   | *   | 1   |
| VWDM (70)      | 13  | 7   | 13  | 20  | 11  | 3   | 14  | 4   | 3   | *   | 1   | *   | *   | *   | *   | 3   | 7   |
| WVWC (53)      | 23  | 2   | 13  | 4   | 6   | 8   | 36  | 2   | 2   | *   | 2   | *   | *   | *   | 2   | *   | 2   |
| Overall (1665) | 27  | 12  | 18  | 10  | 5   | 2   | 12  | 3   | 3   | 1   | 1   | 1   | 0   | 0   | 1   | 2   | 2   |

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 27% of those that did not visit Pembrokeshire in 2007 did not go on holiday, 18% booked their accommodation elsewhere using a tour operator/travel agent, 12% booked direct using other brochures, a further 12% booked their accommodation using the Internet and 10% booked directly with the accommodation provider. These findings are very similar to those recorded in 2006 where 28% did not go on holiday, 17% booked using a tour operator / travel agent, 17% booked directly with the accommodation provider and 11% used the Internet. Other ways respondents booked their accommodation include; through a coach touring group, through a holiday club, through the Caravan Club and through Wales Tourist Board.

## Q19: What was the main reason for deciding not to visit Pembrokeshire during 2007?

Q19 was only asked of respondents that did NOT visit Pembrokeshire in 2007, as stated in Q1.  
(Note the low bases for all categories)

|                | A<br>% | B<br>% | C<br>% | D<br>% | E<br>% | F<br>% | G<br>% | H<br>% | I<br>% | J<br>% | K<br>% |
|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| RT (69)        | 10     | 4      | 32     | 17     | *      | 3      | 12     | 9      | 7      | 4      | 1      |
| DM (93)        | 12     | 1      | 17     | 24     | 2      | 9      | 6      | 3      | 2      | 17     | 6      |
| HGF (73)       | 14     | 7      | 27     | 12     | *      | 4      | 12     | 4      | 1      | 12     | 5      |
| INFO (82)      | 15     | 7      | 23     | 10     | 1      | 11     | 11     | 2      | 1      | 15     | 4      |
| PH (77)        | 18     | 6      | 31     | 18     | 1      | 9      | *      | 1      | 3      | 6      | 5      |
| SM (80)        | 4      | 4      | 38     | 19     | 1      | 9      | 5      | 5      | 3      | 10     | 4      |
| DMBRA (73)     | 5      | 12     | 23     | 18     | 1      | 4      | *      | 16     | 8      | 8      | 3      |
| TQ (74)        | 15     | 5      | 19     | 22     | 1      | 8      | 9      | 4      | 3      | 5      | 8      |
| TBDM (76)      | 16     | 8      | 28     | 14     | 1      | 11     | 7      | 4      | 5      | 4      | 3      |
| CIC (71)       | 14     | 23     | 24     | 11     | 3      | 11     | 8      | 1      | *      | 3      | 1      |
| TG (80)        | 15     | 16     | 24     | 15     | 5      | 5      | 14     | *      | 3      | 3      | 1      |
| AOS (43)       | 26     | 19     | 19     | *      | 5      | 7      | 16     | *      | 2      | 7      | *      |
| UKHC (87)      | 15     | 22     | 17     | 14     | 3      | 3      | 10     | 3      | 1      | 8      | 2      |
| ESHC (87)      | 16     | 9      | 28     | 17     | 2      | 8      | 9      | 2      | 1      | 5      | 2      |
| EUKB (78)      | 21     | 10     | 19     | 9      | *      | 8      | 13     | 4      | 1      | 13     | 3      |
| EABC (80)      | 19     | 4      | 18     | 14     | 3      | 9      | 19     | *      | *      | 13     | 4      |
| UKABC (88)     | 22     | 13     | 23     | 15     | 3      | 5      | 9      | *      | 2      | 7      | 2      |
| ETBH (85)      | 13     | 14     | 24     | 13     | 1      | 2      | 6      | 1      | 5      | 7      | 14     |
| OPS (78)       | 13     | 14     | 24     | 9      | 5      | 3      | 14     | 4      | 3      | 6      | 5      |
| WTGB (68)      | 10     | 9      | 35     | 12     | 3      | 1      | 18     | *      | 3      | 4      | 4      |
| VWDM (70)      | 13     | 1      | 21     | 10     | 1      | 1      | 27     | 1      | 7      | 10     | 6      |
| VVWC (53)      | 6      | 15     | 30     | 11     | *      | 4      | 9      | 9      | 2      | 8      | 6      |
| Overall (1665) | 14     | 10     | 25     | 14     | 2      | 6      | 10     | 3      | 3      | 8      | 4      |

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

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

The figures in the above table show that overall, 25% of respondents that did not visit Pembrokeshire in 2007 stated that there was no particular reason for not visiting. 14% stated that their main reason for not visiting was because they went abroad and a further 14% did not visit due to illness/death in the family. These figures are very similar to those recorded in 2006 where 19% stated that the main reason for not visiting Pembrokeshire was because they went abroad.

## Q20: Please specify the 'other' reason for deciding not to visit Pembrokeshire during 2007?

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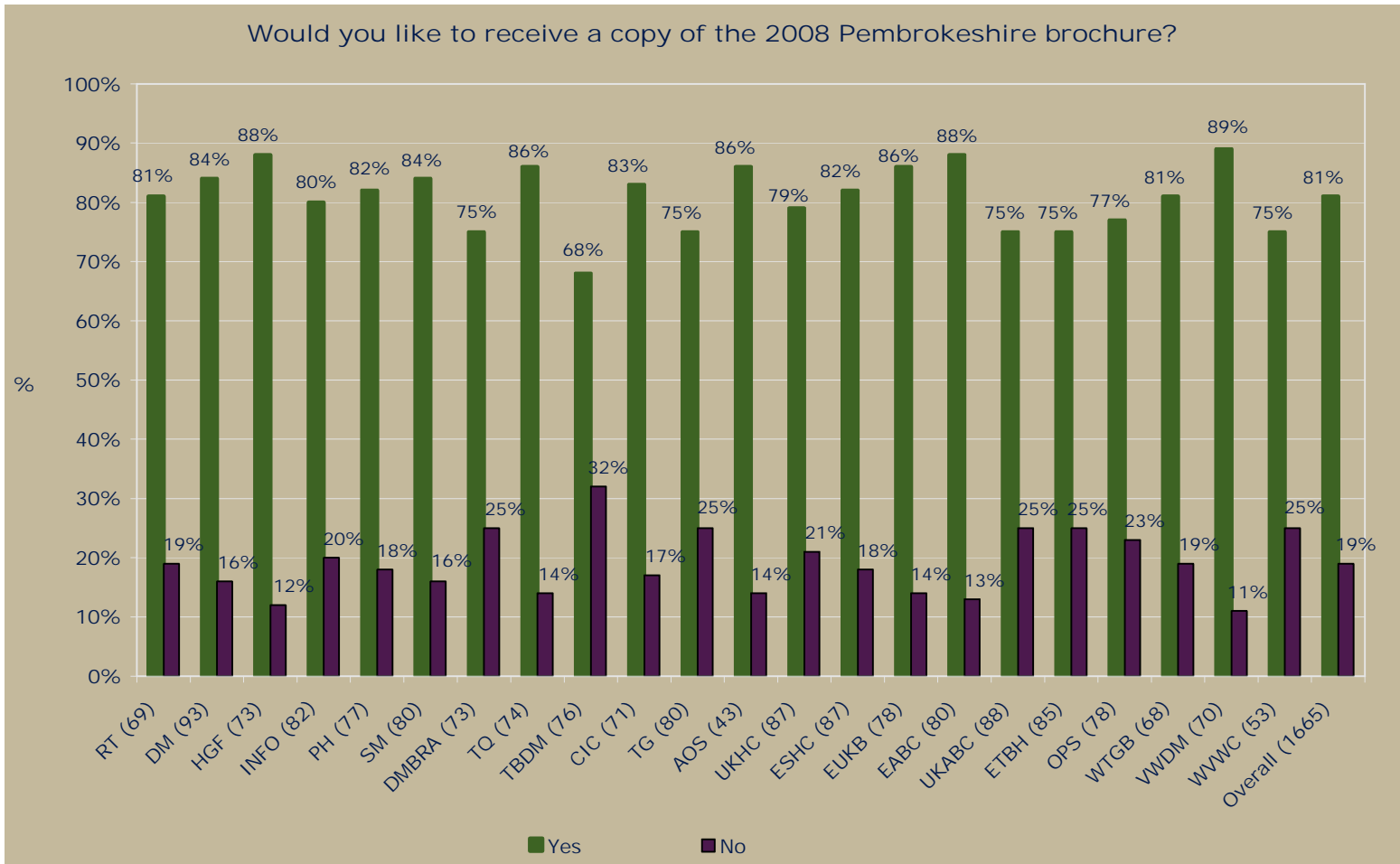
Q20 was only asked of respondents that did NOT visit Pembrokeshire in 2007, as stated in Q1 but stated 'other' to Q19. (Note the low bases for all categories)

69 respondents (4%) selected 'other' when asked what was the main reason for deciding not to visit Pembrokeshire during 2007. Those respondents were then asked to specify what that 'other' reason was and the responses included the following.

|   |   |
|---|---|
| Anniversary   | No bus companies available to take them there               |
| Bought a caravan                                    | No transport  |
| Can't take dogs where they wanted to go             | Not enough caravan parks                                    |
| Chosen accommodation not available                  | Not on their schedule of holidays                           |
| Cost  | Son moved to America, holidayed there                       |
| Couldn't find suitable accommodation                | Received a special offer for alternative destination        |
| Couldn't get time off work                          | The holiday club does not go to Pembrokeshire               |
| Devon was cheaper                                   | Visited family  |
| Weather   | Wanted to visit some particular gardens in Kent             |
| Having work done on the house                       | Welsh people are not friendly                               |
| Lack of half board accommodation                    | Went back to a hotel they visited in South Wales in 2006    |
| Needed accommodation that takes dogs                | Went back to Torquay because grandchildren well catered for |
| Never going to Wales again due to the bridge charge |   |

## Q21: Would you like to receive a copy of the 2008 Pembrokeshire brochure?

Q21 was only asked of respondents that did NOT visit Pembrokeshire in 2007, 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 2007 would like to receive a copy of the 2008 Pembrokeshire brochure. Overall, 81% stated this.

Again this shows an increase on the 74% that wanted the guide in 2006 and 67% that wanted to receive it in 2005.

In total, 1345 requests for the 2008 brochure have been received as a result of this question.



## Conversion Rates

|  | Media Title                            | Total Survey | % Total Survey | Total Visitors | % Total Survey | % Total Visitors | Conversion |
|--|--|--------------|----------------|----------------|----------------|------------------|------------|
|  | Radio Times                            | 108          | 4.9%           | 39             | 1.77%          | 7.3%             | 36.11%     |
|  | Daily Mail                             | 117          | 5.3%           | 24             | 1.09%          | 4.5%             | 20.51%     |
|  | Holiday Guide Finder                   | 106          | 4.8%           | 33             | 1.5%           | 6.2%             | 31.13%     |
|  | INFO                                   | 103          | 4.7%           | 21             | 0.95%          | 3.9%             | 20.39%     |
|  | Planning a Holiday                     | 105          | 4.8%           | 28             | 1.27%          | 5.2%             | 26.67%     |
|  | Sunday Mirror BRA                      | 112          | 5.1%           | 32             | 1.45%          | 6.0%             | 28.57%     |
|  | Daily Mirror BRA                       | 103          | 4.7%           | 30             | 1.36%          | 5.6%             | 29.13%     |
|  | Telemarketing Questionnaire            | 102          | 4.6%           | 28             | 1.27%          | 5.2%             | 27.45%     |
|  | Take a Break-Direct Mail               | 99           | 4.5%           | 23             | 1.05%          | 4.3%             | 23.23%     |
|  | Consumer Info Centre Booklet           | 101          | 4.6%           | 30             | 1.36%          | 5.6%             | 29.70%     |
|  | The Gallery                            | 101          | 4.6%           | 21             | 0.95%          | 3.9%             | 20.79%     |
|  | Axiom Online Survey                    | 51           | 2.3%           | 8              | 0.36%          | 1.5%             | 15.69%     |
|  | The UK Holiday Collection              | 110          | 5.0%           | 23             | 1.05%          | 4.3%             | 20.91%     |
|  | Enjoy a Seaside Holiday Card           | 99           | 4.5%           | 12             | 0.55%          | 2.2%             | 12.12%     |
|  | Enjoy a UK Break                       | 96           | 4.4%           | 18             | 0.82%          | 3.4%             | 18.75%     |
|  | Enjoy an Autumn Break Card             | 99           | 4.5%           | 19             | 0.86%          | 3.6%             | 19.19%     |
|  | The UK Autumn Breaks Collection        | 101          | 4.6%           | 13             | 0.59%          | 2.4%             | 12.87%     |
|  | Enjoy a Traditional British Holiday CD | 101          | 4.6%           | 16             | 0.73%          | 3.0%             | 15.84%     |
|  | Opinion Poll Survey                    | 92           | 4.2%           | 14             | 0.64%          | 2.6%             | 15.22%     |
|  | Where to go in Britain                 | 106          | 4.8%           | 38             | 1.73%          | 7.1%             | 35.85%     |
|  | VW Direct Mail                         | 102          | 4.6%           | 32             | 1.45%          | 6.0%             | 31.37%     |
|  | Walk Visitwales.com Campaign           | 86           | 3.9%           | 33             | 1.5%           | 6.2%             | 38.37%     |
|  | <b>Totals</b>                          | <b>2200</b>  | <b>100%</b>    | <b>535</b>     | <b>24.3%</b>   | <b>100%</b>      |            |

The conversion rate for 2007 was 24.3%, this was a slight decrease when compared to the 25.17% conversion rate achieved in 2006 and the 27.93% recorded in 2005.

# Conversion Rates Additional Information

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Pembrokeshire  
2007 Conversion Research  
Additional Information

- (a) A total number of 535 interviewed parties visited Pembrokeshire during 2007
- (b) The average number of people per party was 3.35
- (c) The average number of nights stayed per party was 5.24
- (d) Therefore, the number of visitor nights was 9,391.39

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 6

- (a) A total number of 292 parties visited Pembrokeshire during 2007, and managed to recall their spend
- (b) The average number of people per party was 3.24
- (c) The average number of nights stayed per party was 5.34
- (d) Therefore, the number of complete visitor nights was 5052.07
- (e) The average total spend per party was £465.79
- (f) The average spend per person, per day was £143.76
- (g) The total expenditure for this conversion research was £726,285.18

# Analysis of Figures

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

## 1. Survey Number

There were 2200 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 2200 interviews, 535 people visited Pembrokeshire in 2007.

## 3. Conversion rate

The overall conversion rate [as shown on page 4] is 24%. 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 Visit Wales activity (Walk Visitwales.com 38.37% & Spring Wales Walking Campaign 31.37%), the Radio Times (36.11%), Where to go in Britain (35.85%) and the Holiday Guide Finder (31.13%). However, the lower conversion rates were seen from the Enjoy a Seaside Holiday Card (12.12%), the UK Autumn Breaks Collection (12.87%), the Opinion Poll Survey (15.22%), the Axiom Online Survey (15.69%) and the Enjoy a Traditional British Holiday CD (15.84%), 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 £97,881.00. Costs for Telemarketing Questionnaire and staff costs are not included in the research, but should be borne in mind when considering the 2008/09 media schedule.

## Analysis of Figures cont...

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### 5. Actual response

91,586 brochures were mailed as a result of the activities included in the media campaign, as outlined in this research. The largest proportion went through the Opinion Poll Survey [32,619] and the Walk Visitwales.com Campaign [12,918].

### 6. Responses converted

Of the 91,586 brochures mailed, 20,607.50 were converted into bookings.

### 7. Fulfilment cost & production cost

The total cost of producing and fulfilling the 91,586 brochure requests was £91,128.07. This equates to £0.995 for each brochure. The total cost of producing and fulfilling the brochure requests, minus the income received for the guide was £58,889.80, which equates to £0.643 for each brochure.

### 8. Cost per response

The best CPR achieved was the Take a Break Direct Mail, coming in at only £0.56 per response generated. The next best was the Axciom Online Survey achieving £0.65 per response, then £0.71 for the Spring Wales Walking Campaign. Other activity that achieved a CPR under £1 include the Walk Visitwales.com Campaign (£0.77), INFO (£0.79) and CIC (£0.82). 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 £156,770.80. Please note that these costs include the design and printing of the 2007 Holiday Guide, plus other associated costs. These costs have been offset by income received from advertising and partners.

### 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 £3.48 to £4.12 - a large % increase. This takes the Radio Times 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...

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### 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 £9.63.

Activity over this benchmark includes The UK Autumn Breaks Collection [£29.58], which should be scrutinised closely to see if it is worthwhile investing in this in 2008/09. The better performing ones include the Walk Visitwales.com campaigns [£3.69], the Spring Wales Walking Campaign [£4.33], the CIC Booklet [£4.93], the Take a Break Direct Mail [£5.19], the Holiday Guide Finder [£5.56] and the Where to go in Britain [£5.57].

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

The direct Return on Investment purely for day visits equated to a total of £209,710.72. The equivalent for staying visits was £17,103,858.66, giving a total ROI figure of £17,313,569.38

This figure has come from a direct spend of £156,770.80 [media + fulfilment & production - income], but does not include staff time. The average ROI was £118.81, but the overall ROI was £110.44, i.e. for every £1 spent on the marketing campaign, £110.44 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 2007 after requesting a brochure, they indicated their intent to visit in 2008 and 2009. 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 £14,880.11 and for staying visits at £18,889,790.24. [Note that this is over 2008 and 2009, not just 1 year]. The total VGI for the campaign has been calculated at £18,904,670.35

### 14. Overall campaign ROI

The return on investment, including the actual spend and VGI is £36,218,239.73. A not insignificant sum, from a media and fulfilment/production spend of £156,770.80.

### 15. Overall campaign ROI ratio

The overall campaign ROI, including value of good intentions was £231.03, i.e. for every £1 spent on the marketing campaign, £231.03 could be generated into the Pembrokeshire tourism economy.

# Recommendations

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## 1. Increase conversion rates and improve cost per conversion

Of all of the figures stated in the report, the aim must be to increase the conversion rate and the cost per conversion. The only way that this will happen is to improve the targeting of the marketing activities:

Keep:

- Telemarketing Questionnaire
- Visit Wales Activity (Walk visitwales.com Campaign & Spring Wales Campaign)
- Consumer Info Centre Booklet
- Take a Break Direct Mail
- Holiday Guide Finder
- Where to go in Britain

Review:

- Radio Times [The conversion rate is good at 36.11% but the CPC is quite high at £11.42, so consideration needs to be given as to if these figures can be improved or whether the funds should be invested elsewhere to get better responses]
- Daily Mail [Again, good conversion rate but slightly disappointing CPC]
- Opinion Poll Survey [This produces a staggering amount of requests (32,619) but the conversion rate is fairly low at 15.22% and the CPC is quite high at £11.96]
- Enjoy a UK Break and Enjoy an Autumn Break Card [These both produce quite low conversion rates but high CPC]

Drop:

- UK Autumn Breaks Collection [The CPC is over the £25 benchmark and the CPR is very high. Either drop this activity completely or seriously review whether or not these figures can be improved ]
- Enjoy a Seaside Holiday Card [The conversion rate is low and the CPC is quite high. Either drop this activity completely or seriously review whether or not these figures can be improved ]
- Enjoy a Traditional British Holiday CD [The conversion rate is low and the CPC is quite high. Either drop this activity completely or seriously review whether or not these figures can be improved ]

# Recommendations

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## 2. Increase repeat visits

Pembrokeshire already has a loyal visitor base, with a large proportion having visited before. With competition increasing, however, it is important to ensure that Pembrokeshire has a programme of activity which keeps the area in people's minds, so when they do think of going on a short break / holiday, Pembrokeshire is their first thought. The brochure can achieve this to a degree with good direct marketing activity, building on the good example of the Spring Wales Walking Campaign. It is recommended that some more of the budget could be allocated to this type of media and working with Visit Wales.

## 3. Increasing length of stay

Of those who visited Pembrokeshire after receiving the brochure, their average length of stay was 5.24 nights, which is slightly less when compared with the conversion research that took place in 2006. This should be built on for the future. On and offline marketing campaigns should be used to maintain or grow the length of stay.

## 4. Booking accommodation

The way that people book accommodation is becoming an increasingly interesting component of the holiday taking process. How far in advance do people book? What methods do they use to book? How do they research the accommodation they choose? The nature of the research did not allow us to reliably demonstrate responses to these questions; however it is felt that this is an area that could feature within more in-depth research, either through a similar tele-marketing survey, or an onsite visitor survey. Interestingly though, more people used the Pembrokeshire Brochure in 2007 than in 2006, yet of those that did not visit Pembrokeshire in 2007 but went elsewhere, an increasing amount booked their accommodation through websites. This further highlights the need for more in-depth research to show how people book accommodation, use brochures, use the Internet, for example, is it just for searching? Do they book online? Which websites do they use? What search criteria do they use?

## 5. The competition

Of those who ordered a brochure, but did not visit in 2007, the majority didn't take a holiday in 2007 or they went abroad, however, Cornwall, Devon, Wales (in particular North Wales), Yorkshire and Scotland were the most commonly quoted competitors. It is imperative that the brochure design paints Pembrokeshire in a very positive light compared with these other UK destinations. It is important to focus on Pembrokeshire's core brand values / unique selling points.

END

# Key Contacts

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