



STRICTLY PRIVATE AND CONFIDENTIAL

Pembrokeshire Holiday Guide 2006

Media Campaign Effectiveness Research

Client: Pembrokeshire County Council

Date: 23rd March 2007

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Background and Objectives

Pembrokeshire County Council commissioned Carrier Direct Marketing and Customer Maze to research the effectiveness of the 2006 Pembrokeshire Holiday Guide.

This research was also carried out in 2004 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

Customer Maze conducted 2002 telephone interviews between the 12th February and the 12th March 2007. 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)
What's on TV BRA1 (WTV)
Planning a Holiday (PH)
Sunday Mirror BRA (SM)
Daily Mirror BRA (DMBRA)
Consumer Lifestyle (CL)
Consumer Information (CI)
TIC Requests (TIC)
The Gallery (TG)
Website (WEB)
Axicom Online Survey (AOS)
UK Holiday Collection (UKHC)
Enjoy a Seaside Holiday (ESH)
Enjoy a UK Break (EUKB)
Enjoy an Autumn Break (EAB)
UK Premier Holiday Collection (PHC)
UK Autumn Breaks (UKAB)
Enjoy a Traditional British Holiday (ETBH)

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

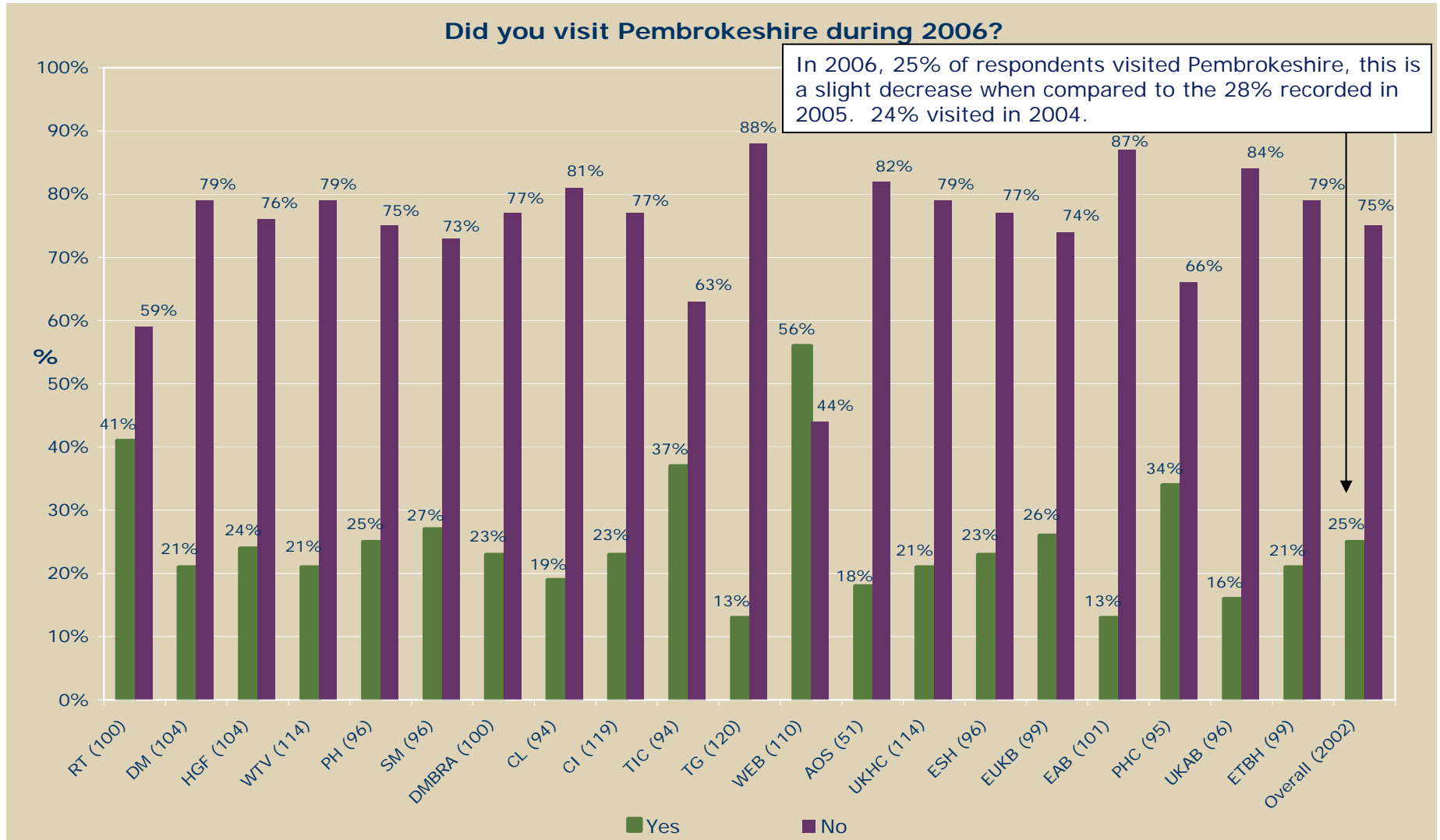
It is important to be aware that some questions have very low response rates and therefore are displayed as having low bases. In these instances it is advised that this data is not statistically reliable and it is recommended that strategic decisions are not based solely on this data.

Where possible, data from the 2004 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 2006 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

Q1: Did you visit Pembrokeshire during 2006?



Q2: How many nights did you stay?

Q2 to Q8 only asked of respondents that visited Pembrokeshire during 2006. (Note the low bases for all categories)

	Day trip %	1 night %	2 – 4 ngts %	5 – 7 ngts %	8–14 ngts %	15–21 ngts %	22 ngts + %
RT (41)	0	2	27	61	10	0	0
DM (22)	9	0	23	59	9	0	6
HGF (25)	8	0	8	68	12	4	0
WTV (24)	0	0	13	67	21	0	0
PH (24)	8	0	8	71	13	0	0
SM (26)	19	0	19	58	4	0	0
DMBRA (23)	9	0	22	70	0	0	0
CL (18)	17	0	39	39	0	6	0
CI (27)	11	4	22	52	4	4	4
TIC (35)	3	3	23	51	20	0	0
TG (15)	13	13	13	33	20	7	0
WEB (62)	5	0	27	55	11	0	2
AOS (9)	11	0	33	22	33	0	0
UKHC (24)	8	0	17	58	8	8	0
ESH (22)	9	0	36	50	5	0	0
EUKB (26)	15	0	27	46	12	0	0
EAB (13)	8	0	23	38	31	0	0
UKPHC (32)	13	0	34	44	9	0	0
UKAB (15)	7	7	40	40	7	0	0
ETBH (21)	10	0	24	62	5	0	0
Overall (504)	8	1	24	54	11	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.

Over half, 54% stayed in Pembrokeshire for *5-7 nights*, 25% stayed for a short break [1-4nights] and 8% visited for a *day trip*. These figures are very similar to those recorded in 2005.

Q3: What type of accommodation did you use?

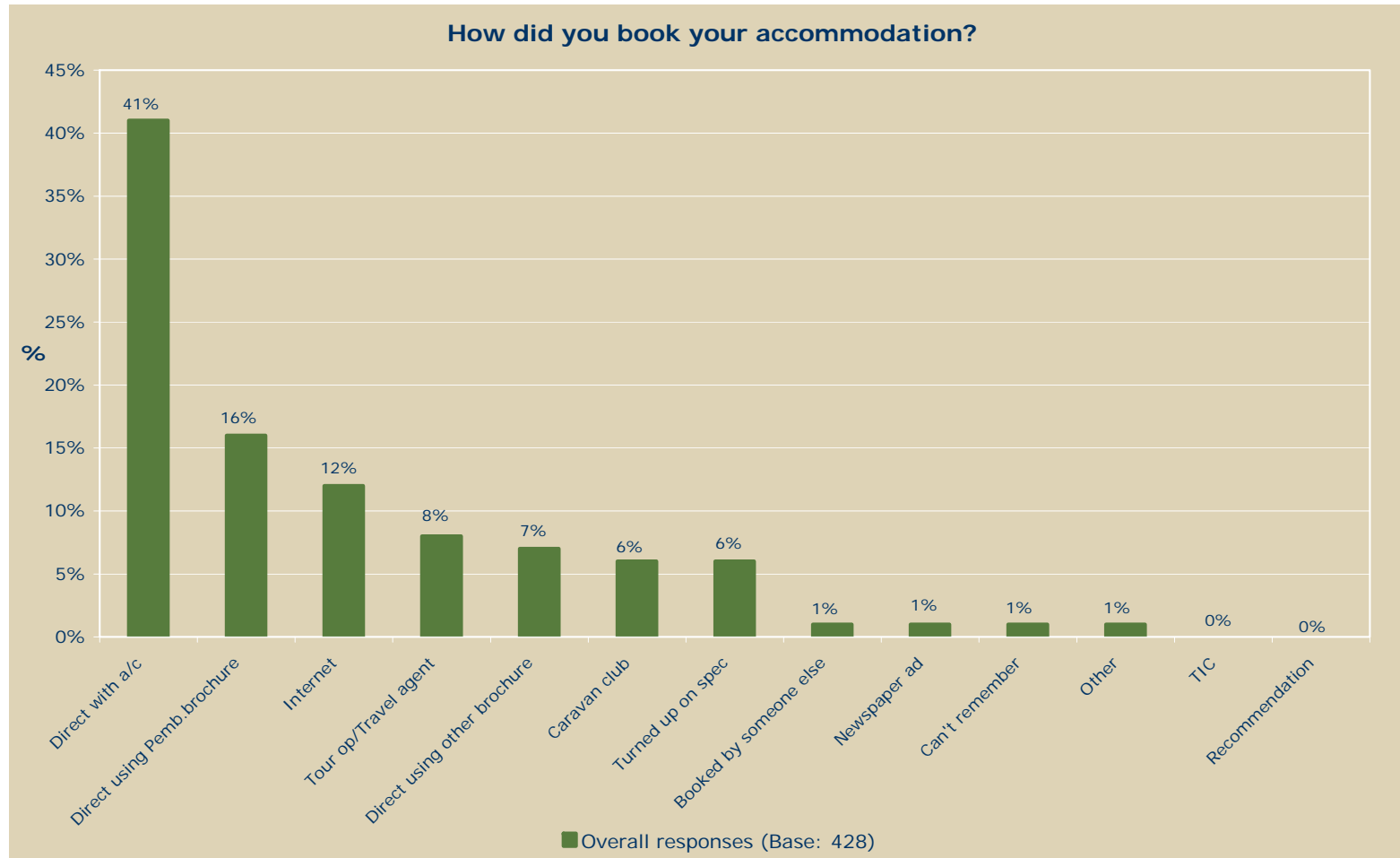
Q3 & Q4 only asked of respondents that stayed overnight in Pembrokeshire. (Note the low bases for all categories)

	Hotel %	B&B/GHse %	SC %	C&C %	VFR %	Own a/c %	Hol park %	Other %
RT (41)	20	20	39	10	5	5	0	2
DM (20)	20	10	20	35	5	5	5	0
HGF (23)	13	13	39	35	0	0	0	0
WTV (24)	42	8	17	29	0	0	4	0
PH (22)	23	18	27	23	5	5	0	0
SM (21)	19	24	38	19	0	0	0	0
DMBRA (21)	33	5	29	33	0	0	0	0
CL (15)	27	7	13	33	20	0	0	0
CI (24)	13	17	21	25	21	0	4	0
TIC (34)	12	24	38	12	12	0	0	3
TG (13)	15	31	38	15	0	0	0	0
WEB (59)	19	15	31	24	3	3	0	5
AOS (8)	25	0	0	38	13	0	13	13
UKHC (22)	27	9	32	14	9	5	5	0
ESH (20)	35	5	10	35	10	0	5	0
EUKB (22)	32	27	14	23	0	5	0	0
EAB (12)	0	42	33	25	0	0	0	0
UKPHC (28)	39	7	32	14	4	4	0	0
UKAB (14)	29	21	29	14	7	0	0	0
ETBH (19)	42	26	5	21	0	0	0	5
Overall (462)	24	16	27	23	5	2	1	2

Visitors choosing to stay in *self catering, hotels and caravan and camping* show similar levels of popularity, as highlighted by 27%, 24% and 23% respectively.

Interestingly, the same types of accommodation were popular in 2005, with 30% staying in self catering, 25% staying in hotels and 22% staying in caravans or campsites.

Q4: How did you book your accommodation?



As the bases were again very low for this question, the results have been displayed as an overall picture as this gives a clear idea of how respondents booked their accommodation when they stayed in Pembrokeshire in 2006. The most popular method was to *book directly with the accommodation provider*; 41%. 16% used the *Pembrokeshire brochure*. A declining pattern has emerged whereby the usage of the Pembrokeshire brochure is waning and booking accommodation directly with the provider is increasing. This has been reflected by 31% using the Pembrokeshire guide in 2004 to 21% in 2005 and 16% in 2006. In 2004, 17% booked directly with the accommodation, this rose to 25% in 2005 and is currently 41%.

Q5: How many people were there in your party?

	1 person %	2 people %	3 people %	4 people %	5 people %	6-10 people %	11-20 people %	21 people + %
RT (41)	7	63	0	20	10	0	0	0
DM (22)	9	73	0	9	0	9	0	0
HGF (25)	8	72	4	12	0	4	0	0
WTV (24)	4	46	8	29	4	4	0	4
PH (24)	0	67	13	13	0	4	4	0
SM (26)	0	73	12	4	0	12	0	0
DMBRA (23)	0	70	9	22	0	0	0	0
CL (18)	6	72	6	11	0	0	0	6
CI (27)	11	63	7	0	7	0	4	7
TIC (35)	6	66	6	9	6	9	0	0
TG (15)	0	73	0	20	0	7	0	0
WEB (62)	0	34	16	26	13	5	3	2
AOS (9)	0	33	0	33	22	0	0	11
UKHC (24)	4	54	8	21	8	4	0	0
ESH (22)	14	73	5	9	0	0	0	0
EUKB (26)	0	96	0	0	4	0	0	0
EAB (13)	8	77	8	0	0	8	0	0
UKPHC (32)	0	78	6	6	6	3	0	0
UKAB (15)	13	60	7	13	0	7	0	0
ETBH (21)	5	76	0	10	0	5	0	5
Overall (504)	4	64	7	14	5	4	1	1

64% of respondents travelled to Pembrokeshire in a party size of *two people*. Although the figures are slightly different they do reflect the same pattern as that of 2005 whereby the most popular party size was again two people; 51%.

Q6: What was it about Pembrokeshire that persuaded you to visit?

	A %	B %	C %	D %	E %	F %	G %	H %	I %	J %	K %
RT (41)	37	5	24	12	7	2	5	2	5	0	0
DM (22)	45	9	0	18	0	9	0	0	5	5	9
HGF (25)	36	20	12	4	4	4	8	12	0	0	0
WTV (24)	25	29	17	21	0	0	8	0	0	0	0
PH (24)	29	42	4	8	4	8	0	4	0	0	0
SM (26)	35	12	31	4	8	0	0	8	4	0	0
DMBRA (23)	17	48	0	13	4	4	9	4	0	0	0
CL (18)	17	17	28	11	22	0	0	0	6	0	0
CI (27)	30	15	7	4	19	4	7	7	4	4	0
TIC (35)	17	11	23	17	14	0	6	0	3	3	6
TG (15)	40	33	7	0	7	7	0	7	0	0	0
WEB (62)	19	31	19	8	8	5	2	3	0	3	2
AOS (9)	22	33	0	22	11	11	0	0	0	0	0
UKHC (24)	38	13	25	0	13	4	4	0	0	4	0
ESH (22)	36	14	9	0	14	27	0	0	0	0	0
EUKB (26)	42	15	23	12	4	0	4	0	0	0	0
EAB (13)	46	15	15	0	8	8	0	8	0	0	0
UKPHC (32)	31	13	9	28	6	6	0	3	0	0	3
UKAB (15)	7	20	20	20	7	13	0	0	0	0	13
ETBH (21)	5	14	14	14	10	0	10	5	14	14	0
Overall (504)	28	20	16	11	8	5	3	3	2	2	2

Key:

A: Sightseeing

B: Beaches / Coastline

C: Repeat visitor

D: Walking

E: Visiting friends & relatives

F: Attractions

G: Never been before

H: Peace & quiet / uncrowded places

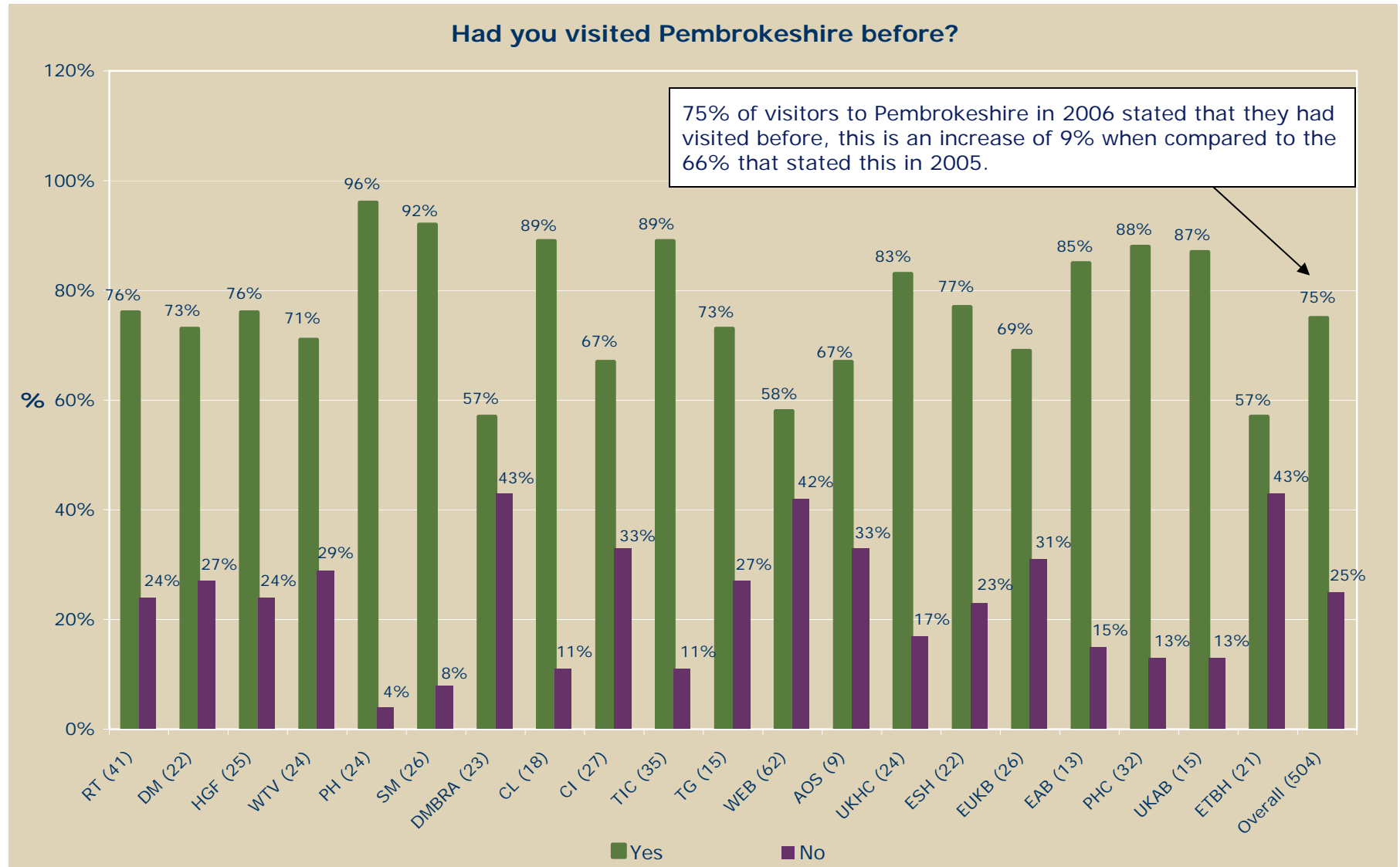
I: Nothing in particular

J: Other

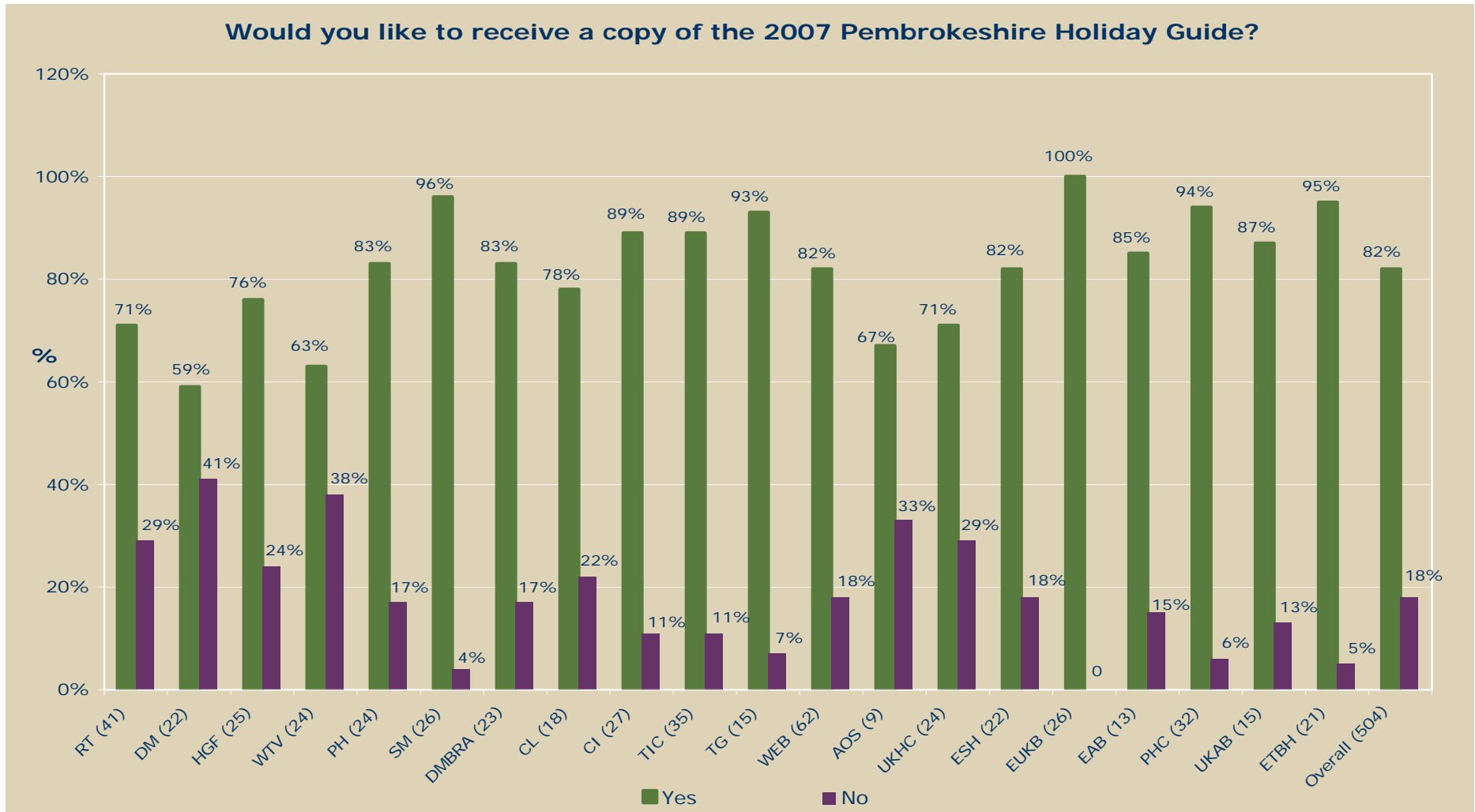
K: Events

Over a quarter [28%] of respondents that visited Pembrokeshire in 2006 stated that they chose to visit because of the *sightseeing*, this was closely followed by 20% visiting for the *beaches / coastline*. 16% stated that they were *repeat visitors*, this has decreased from 29% being repeat visitors in 2005.

Q7: Had you visited Pembrokeshire before?



Q8: Would you like to receive a copy of the 2007 Pembrokeshire Holiday Guide?



The chart above shows that the majority of all media groups would like to receive the 2007 Pembrokeshire Holiday Guide. Overall, 82% stated this. Again, an increasing pattern has emerged as 69% wanted the guide in 2005 and 74% wanted to receive it in 2006.

Q9: Where did you go on holiday last year? (Base: 1498)

Q9 to Q12 only asked of respondents that did not visit Pembrokeshire during 2006. (Note the base changes for all categories)

Area	%	Area	%	Area	%	Area	%
No holiday taken	28%	Somerset	*	Cardiganshire	*	Exmouth	*
Abroad	21%	Toured around	*	Cumbria	*	Fishgard	*
Wales	12%	Falmouth	*	East Anglia	*	Forest of Dean	*
Devon	5%	Llandudno	*	Gloustershire	*	Helston	*
Cornwall	4%	St Ives	*	Jersey	*	Hendy	*
Lake District	4%	Great Yarmouth	*	Penzance	*	Isle of Anglesey	*
Scotland	4%	Yorkshire	*	Plymouth	*	Navel Forth	*
York	2%	Kent	*	Sherwood Forest	*	North Norfolk	*
Bournemouth	2%	London	*	South Coast	*	Nottingham	*
Isle of Wight	1%	North Devon	*	Swansea	*	Oxford	*
Dorchester	1%	St Mawes	*	Bath	*	Paignton	*
Torquay	1%	Chester	*	Broadhaven	*	Skegness	*
Weymouth	1%	Derbyshire	*	Bude	*	Snowdon	*
Norfolk	1%	Ireland	*	Carmarthen	*	Southport	*
Newquay	1%	Lincolnshire	*	Channel Islands	*	Tenby	*
Northumberland	1%	New Forest	*	Cotswolds	*	Wareham	*
Sidmouth	1%	Portsmouth	*	Dawlish	*	Warwick	*
Blackpool	1%	Suffolk	*	East Sussex	*	West Country	*
Scarborough	1%	Anglesea	*	Eastbourne	*	Western Super Mare	*
Dorest	*	Can't remember	*	Eire	*	Wiltshire	*
Eastbourne	*						

Note: * denotes a value of less than one percent but has a value that is greater than zero

The table above shows where respondents chose to visit in 2006 as opposed to visiting Pembrokeshire. The findings of the 2005 research showed that 33% *did not go on holiday* and 20% *went abroad*.

Q10: How did you book your accommodation?

	No hol taken %	Tour op / Travel ag. %	Direct with a/c %	Internet %	Direct with other brochure %	Stayed with friends & family %	Used own a/c %	Turned up on spec. %
RT (59)	22	19	25	7	17	2	2	2
DM (82)	33	16	11	2	21	6	1	5
HGF (79)	16	20	14	14	13	5	3	1
WTV (90)	26	12	22	9	18	1	1	2
PH (72)	29	13	19	11	18	4	3	0
SM (70)	19	24	23	11	7	6	6	1
DMBRA (77)	27	19	17	5	13	5	6	3
CL (76)	45	11	13	13	5	7	3	1
CI (92)	35	14	17	12	10	7	1	1
TIC (59)	31	14	15	19	8	2	7	2
TG (105)	33	17	16	10	5	10	1	2
WEB (48)	23	10	13	31	2	13	2	0
AOS (42)	26	7	17	33	2	7	0	2
UKHC (90)	29	16	18	9	11	6	3	0
ESH (74)	41	19	16	1	9	3	4	3
EUKB (73)	10	25	22	11	12	4	5	3
EAB (88)	23	27	13	19	5	9	2	1
UKPHC (63)	29	17	19	16	6	10	0	0
UKAB (81)	28	19	21	6	7	7	9	0
ETBH (78)	38	18	10	1	5	10	1	5
Overall (1498)	28	17	17	11	10	6	3	2

Q10: How did you book your accommodation?

The table on the previous page shows that 28% of those people that did not visit Pembrokeshire in 2006 *did not go on holiday*, 17% stated that they booked their holiday to another place by using a *tour operator / travel agent*, a further 17% booked *directly with the accommodation provider* and 11% used *the Internet* to make their accommodation bookings. In 2005, only 6% used the Internet to make this kind of booking, this highlights the increased popularity of the Internet.

As several of the responses received such low response rates these have not been included in the previous table. These are detailed below:

Newspaper advert: 1%

Booked by someone else: 1%

Timeshare: 1%

Tourist Information Centre: 1%

Can't remember: 1%

Teletext: *

Recommendation: *

Competition prize: *

*Note: * denotes a value of less than one percent but has a value that is greater than zero.*

Q11: What was the main reason for deciding not to visit Pembrokeshire in 2006?

	A %	B %	C %	D %	E %	F %	G %	H %	I %	J %	K %
RT (59)	17	15	24	12	10	2	7	3	0	8	2
DM (82)	9	26	12	12	24	5	7	4	0	1	0
HGF (79)	25	14	20	20	4	1	6	4	1	3	1
WTV (90)	8	20	20	31	6	7	1	6	1	1	0
PH (72)	13	28	21	21	3	3	1	10	0	1	0
SM (70)	14	14	26	27	3	7	4	1	1	0	1
DMBRA (77)	12	26	25	16	9	3	1	4	4	1	0
CL (76)	18	18	18	7	7	14	4	0	12	1	0
CI (92)	22	20	15	17	5	3	4	7	3	2	1
TIC (59)	29	12	14	12	3	10	8	3	3	3	2
TG (105)	22	22	17	18	7	6	1	0	6	0	2
WEB (48)	17	6	19	19	15	10	2	2	4	2	4
AOS (42)	21	5	12	17	19	10	14	0	2	0	0
UKHC (90)	16	19	24	17	7	4	3	3	2	0	4
ESH (74)	14	35	19	15	7	4	5	0	0	1	0
EUKB (73)	30	8	25	12	18	4	0	1	0	1	0
EAB (88)	35	15	13	7	14	7	3	7	0	0	0
UKPHC (63)	24	21	6	21	6	10	3	6	2	2	0
UKAB (81)	21	11	6	25	12	9	11	5	0	0	0
ETBH (78)	21	21	18	12	12	4	9	4	0	1	0
Overall (1498)	19	18	18	17	9	6	5	4	2	1	1

Key:

A: Went abroad

B: Illness / death in family

C: No particular reason

D: Elsewhere more appealing

E: Time restrictions

F: Financial reasons

G: Personal reasons

H: Too far to travel

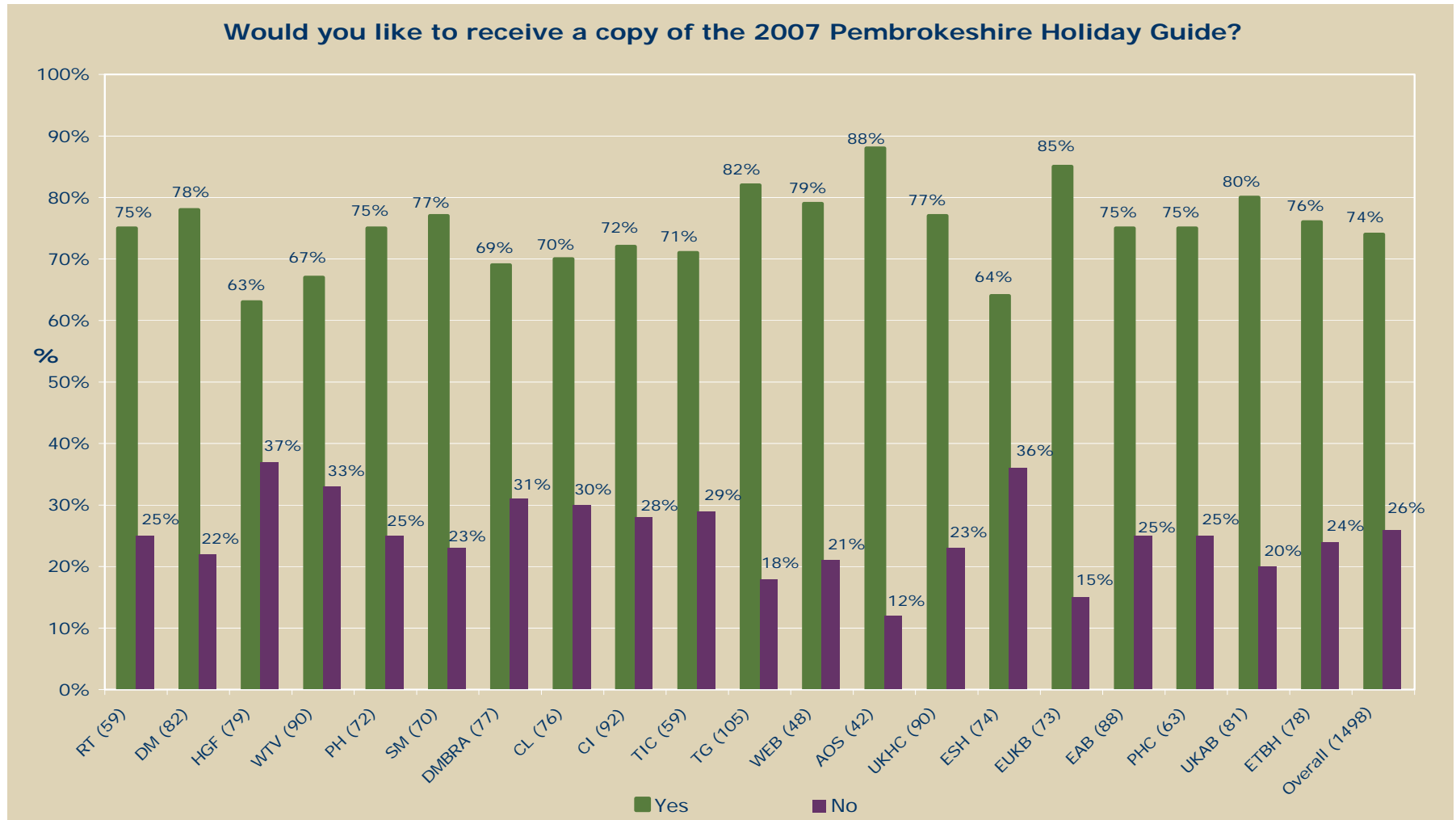
I: No holiday taken in 2006

J: Been before- wanted a change

K: Other

The table above shows that overall, 19% stated that the main reason for not visiting Pembrokeshire was because they went *abroad*. This is very similar to the 18% that stated this in 2005.

Q12: Would you like to receive a copy of the 2007 Pembrokeshire Holiday Guide?



The chart above shows that the majority of all media groups would like to receive the 2007 Pembrokeshire Holiday Guide even though they did not visit during 2006. Overall, 74% stated this. As was the case in Q8 an increasing pattern has emerged as 67% wanted the guide in 2005 and 71% wanted to receive it in 2006.

Conversion Rates

	Media Title	Total Survey	% Total Survey	Total Visitors	% Total Survey	% Total Visitors	Conversion
	Radio Times	100	5%	41	2.05%	8.13%	41%
	Daily Mail	104	5.19%	22	1.1%	4.37%	21.15%
	Holiday Guide Finder	104	5.19%	25	1.25%	4.96%	24.04%
	What's on TV BRA1	114	5.69%	24	1.2%	4.76%	21.05%
	Planning a Holiday	96	4.8%	24	1.2%	4.76%	25%
	Sunday Mirror BRA	96	4.8%	26	1.3%	5.16%	27.08%
	Daily Mirror BRA	100	5%	23	1.15%	4.56%	23%
	Consumer Lifestyle	94	4.7%	18	0.9%	3.57%	19.15%
	Consumer Information	119	5.94%	27	1.35%	5.36%	22.69%
	TIC Requests	94	4.7%	35	1.75%	6.94%	37.23%
	The Gallery	120	6%	15	0.74%	2.98%	12.50%
	Website	110	5.49%	62	3.1%	12.3%	56.36%
	Axicom Online Survey	51	2.55%	9	0.45%	1.79%	17.65%
	UK Holiday Collection	114	5.19%	24	1.2%	4.76%	21.05%
	Enjoy a Seaside Holiday	96	4.8%	22	1.1%	4.37%	22.92%
	Enjoy a UK Break	99	4.95%	26	1.3%	5.16%	26.26%
	Enjoy an Autumn Break	101	5.05%	13	0.64%	2.58%	12.87%
	UK Premier Holiday Collection	95	4.75%	32	1.6%	6.35%	33.68%
	UK Autumn Breaks	96	4.8%	15	0.74%	2.98%	15.63%
	Enjoy a Traditional British Holiday	99	4.95%	21	1.05%	4.17%	21.21%
Totals		2002	100%	504	25.17%	100%	25.17%

The conversion rate for 2006 was 25.17%, this was a slight decrease when compared to the 27.93% conversion rate identified in 2005. However, both years still remain higher than 2004 when a rate of 23.61% was recorded.

END

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