

STRICTLY PRIVATE AND CONFIDENTIAL

Pembrokeshire Holiday Guide 2009

Media Campaign Effectiveness Research

Client: Pembrokeshire County Council

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Background and Objectives

Pembrokeshire County Council commissioned Customer Maze and Carrier Direct Marketing to undertake a comprehensive conversion research exercise on the marketing activity that was carried out by Pembrokeshire Tourism throughout 2009.

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 aimed 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 2009 marketing activity and provide detailed information about those that did visit Pembrokeshire during 2009.

Methodology

Carrier Direct Marketing conducted 1,979 telephone interviews between the 18th February and the 19th March 2010. 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:

| | | | |
|------------------------------|--------|------------------------------------|--------|
| Info | [INFO] | Conversion Research Requests | [CRR] |
| Planning a Holiday | [PH] | Consumer Info Centre Booklet | [CIC] |
| Take a Break - Direct Mail | [TBDM] | Enjoy a Seaside Holiday Card | [ESHC] |
| Axiom Online Survey | [AOS] | Enjoy a Traditional British Hol CD | [ETBH] |
| The UK Holiday Collection | [UKHC] | Where to go in Britain | [WTGB] |
| Opinion Poll Survey | [OPS] | BRADA online | [BO] |
| Travelbrochures.co.uk | [TB] | BRADA Direct Mail | [BDM] |
| RDP & CIC Online Combined | [RDP] | TIC Requests | [TIC] |
| Information-Link | [IL] | Visit Pembrokeshire | [VP] |
| Prm Online Brochure Campaign | [PRM] | Offer X | [OX] |

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.

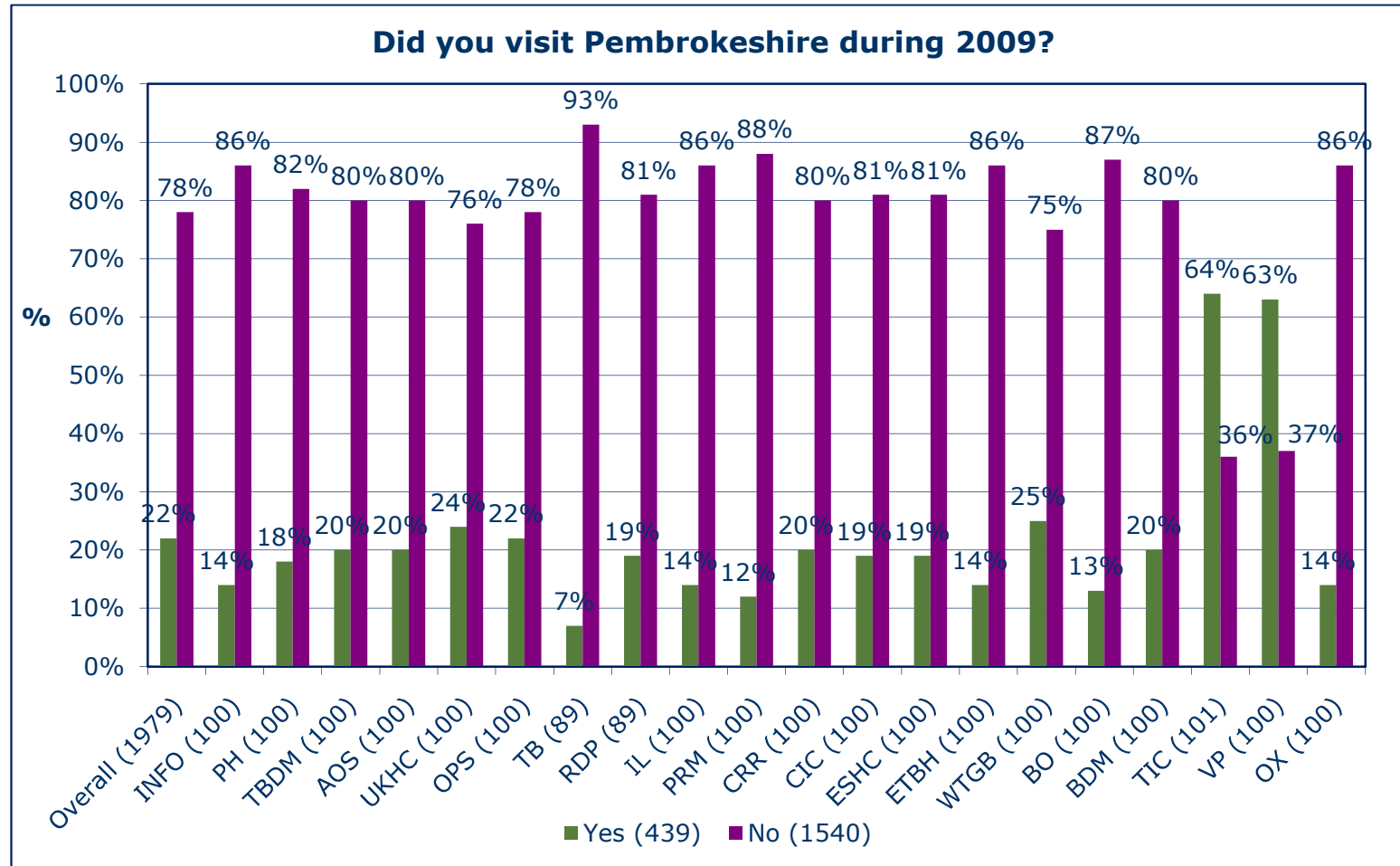
Where possible, data from the 2008, 2007 and 2006 surveys has been included in the report. It is important to read this information with caution and as an indication only as it may not be directly comparable to the data from previous reports based on the different media sources and different bases. It 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 2009?

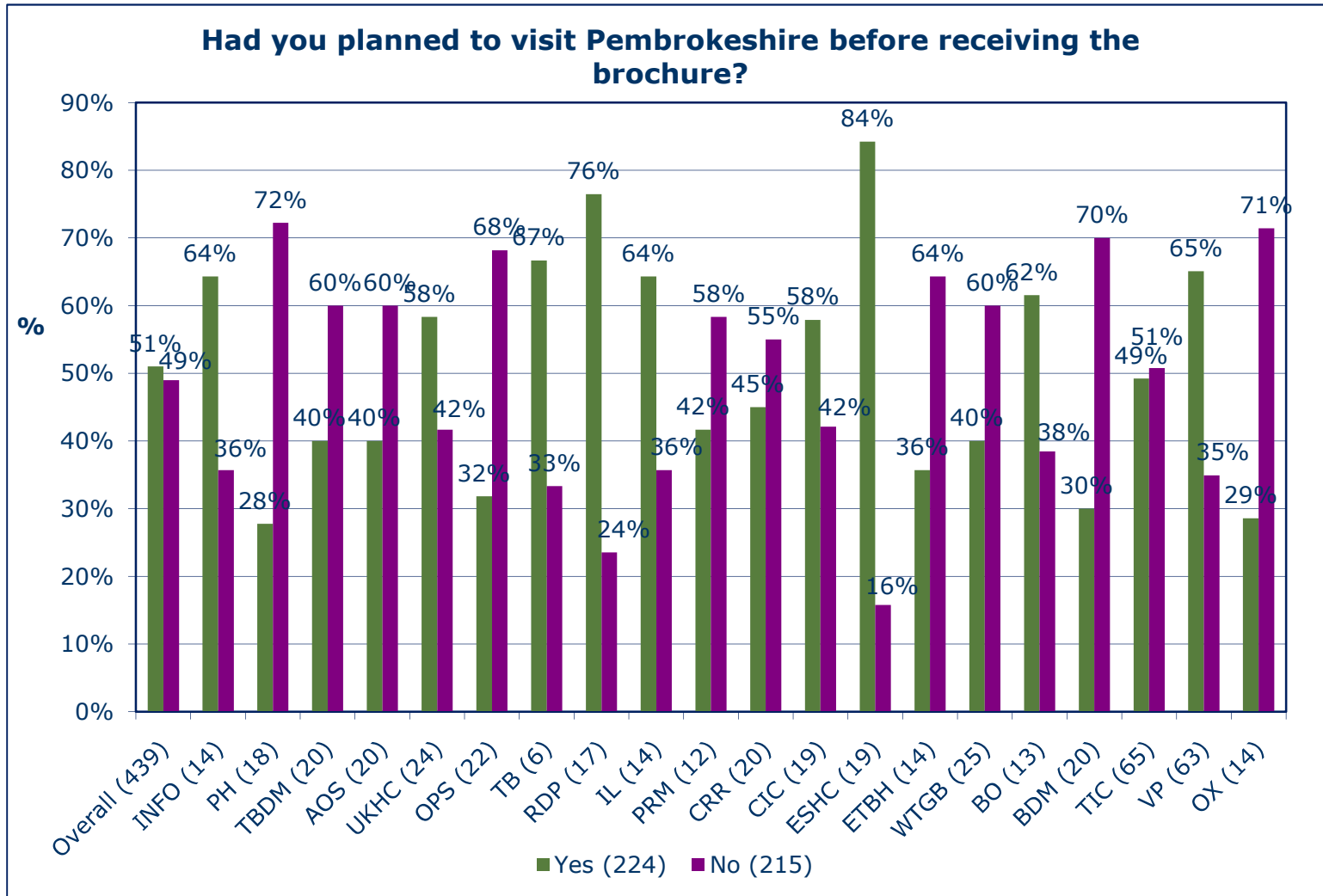


22% of respondents visited Pembrokeshire during 2009, which is a slight increase of 1% when compared with the 21% that visited in 2008. It is however, still slightly lower than the 24% that was recorded in 2007. 25% visited in 2006 and 28% visited in 2005.

The best performing media titles in terms of conversion were the TIC requests and the Visit Pembrokeshire requests with 64% and 63% of respondents visiting the area in 2009 [respectively].

Q2: Had you planned to visit Pembrokeshire before receiving the guide?

Q2 was only asked of respondents that visited Pembrokeshire in 2009, as stated in Q1. (Note the low bases for all categories)



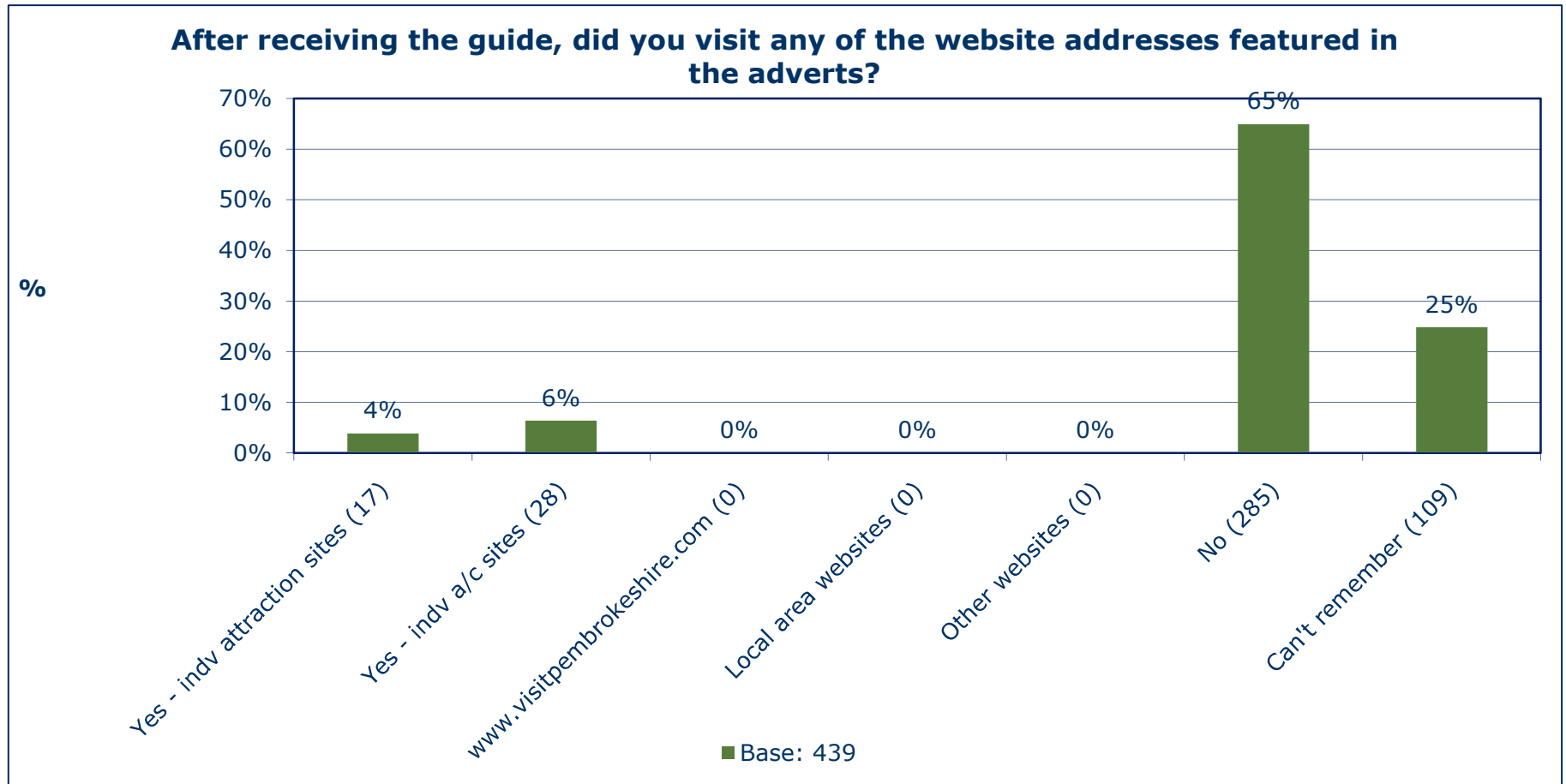
51% of those respondents that did visit Pembrokeshire in 2009 had already planned to visit before receiving the guide. 49%, however, had not planned to visit Pembrokeshire until they received the guide.

72% of those that responded via Planning a Holiday had not decided to visit Pembrokeshire until receiving the guide, whereas 84% of those that requested a copy of the guide via the Enjoy a Seaside Holiday Card had already decided to visit before they received the brochure.

Please note that this question was not asked in previous year's research.

Q3: After receiving the guide, did you visit any of the website addresses featured in the adverts?

Q3 was only asked of respondents that visited Pembrokeshire in 2009, as stated in Q1. (Note the low bases for all categories)

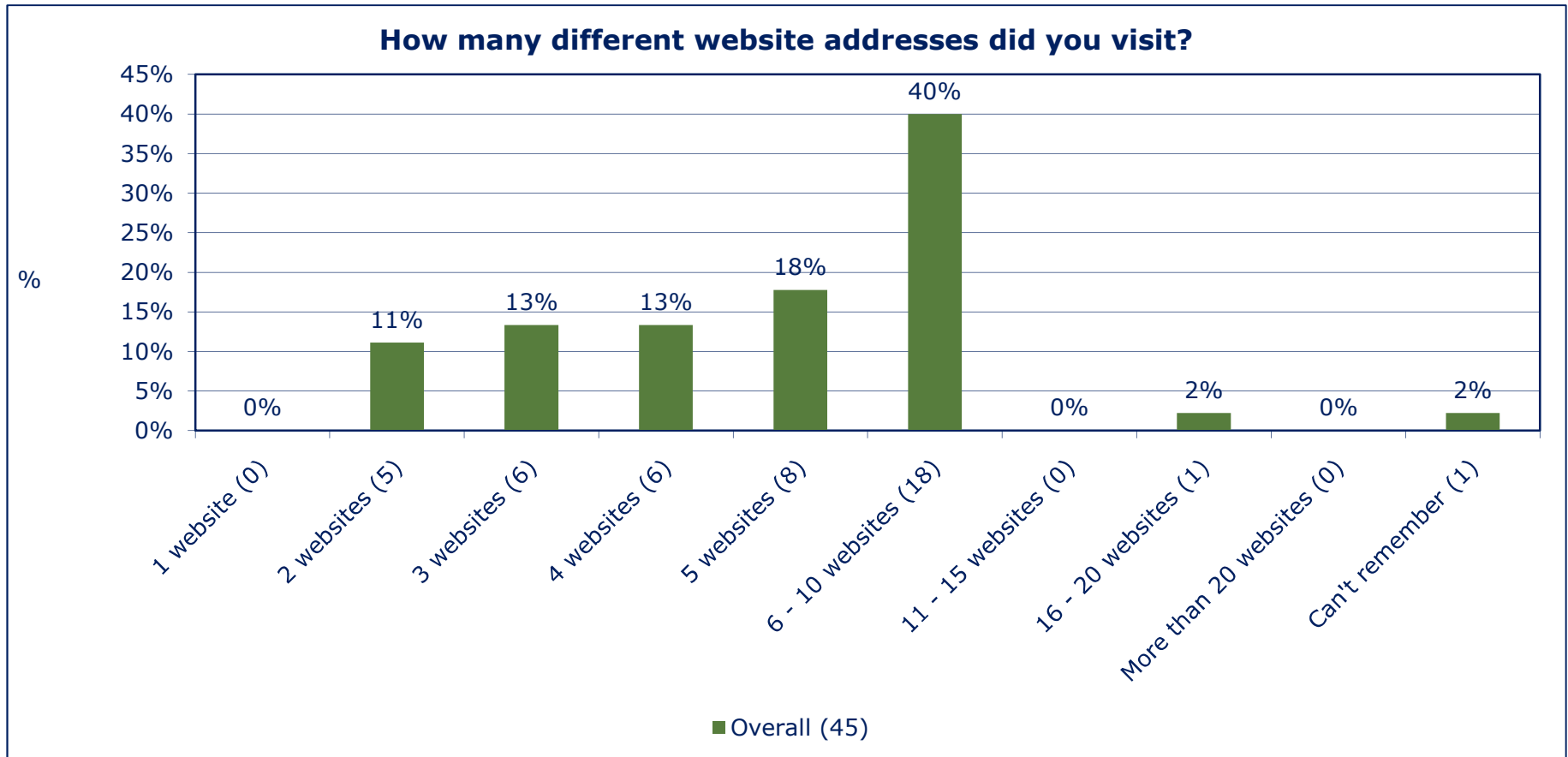


The majority of respondents [65%] said that 'no' they did not visit any of the website addresses featured in the adverts found in the Pembrokeshire brochure. A further 25% said they *couldn't remember*, whereas 6% said they visited *individual accommodation websites* found in the brochure and 4% visited *individual attraction websites* featured within the brochure.

Please note that this question was not asked in previous year's research.

Q4: How many different website addresses did you visit?

Q4 was only asked of respondents that visited Pembrokeshire in 2009, as stated in Q1. (Note the low bases for all categories)



Of those respondents that did visit website addresses featured in the brochure, 40% visited between 6-10 websites, 18% visited 5 websites, 13% visited 4 websites, 13% visited 3 websites and 11% visited 2 websites. Please note that this question was not asked in previous year's research.

Q5 asked those respondents that responded 'other' to Q3 to specify what websites they did visit but there weren't any respondents that selected this option.

Q6: How many nights did you stay?

Q6 was only asked of respondents that visited Pembrokeshire in 2009, 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 % | 10 nights % | 12 nights % | 13 nights % | 14 nights % | 15 nights % | CR* % |
|----------------------|------------|-----------|------------|------------|------------|------------|------------|------------|------------|-------------|-------------|-------------|-------------|-------------|-----------|
| INFO (14) | 14% | - | 7% | 7% | 14% | 7% | - | 36% | 7% | - | - | - | 7% | - | - |
| PH (18) | 6% | 6% | 11% | 6% | 33% | 6% | 6% | 28% | - | - | - | - | - | - | - |
| TBDM (20) | 10% | - | 10% | - | 15% | 10% | 15% | 35% | - | - | - | - | 5% | - | - |
| AOS (20) | - | 5% | 5% | - | 25% | 10% | 10% | 25% | - | - | - | - | 15% | - | 5% |
| UKHC (24) | 13% | - | 4% | 17% | 13% | 4% | - | 38% | - | 4% | - | - | - | 4% | 4% |
| OPS (22) | 18% | 5% | - | 9% | 23% | 14% | 9% | 9% | - | - | - | - | 5% | - | 9% |
| TB (6) | 17% | - | 17% | - | 33% | 17% | - | 17% | - | - | - | - | - | - | - |
| RDP (17) | 24% | - | 12% | 12% | 18% | 6% | - | 18% | - | - | - | 6% | - | - | 6% |
| IL (14) | 14% | - | - | 7% | 14% | - | - | 43% | - | 7% | - | - | 7% | 7% | - |
| PRM (12) | 25% | - | 25% | 25% | - | - | - | 17% | - | - | - | - | - | - | 8% |
| CRR (20) | 25% | - | 10% | 15% | - | 15% | 10% | 10% | - | - | - | - | - | - | 15% |
| CIC (19) | 21% | - | 11% | 11% | 16% | 5% | 11% | 16% | 5% | - | - | - | 5% | - | - |
| ESHC (19) | 11% | - | 11% | - | 11% | 21% | - | 37% | - | - | - | - | 5% | - | 5% |
| ETBH (14) | 7% | - | - | 7% | 29% | - | - | 43% | - | - | - | - | 7% | - | 7% |
| WTGB (25) | 24% | - | - | 16% | 16% | 4% | - | 28% | - | - | - | - | 4% | - | 8% |
| BO (13) | 8% | - | - | 15% | 23% | - | - | 15% | - | 8% | - | 8% | 8% | - | 15% |
| BDM (20) | - | - | - | 10% | 5% | 10% | - | 50% | - | 5% | - | - | 5% | 5% | 10% |
| TIC (65) | - | - | 6% | 6% | 11% | 5% | 2% | 57% | 2% | 2% | 2% | 2% | 6% | - | 2% |
| VP (63) | 2% | - | 6% | 8% | 13% | 10% | 3% | 41% | - | - | 2% | - | 8% | 5% | 3% |
| OX (14) | 21% | - | 14% | 7% | 7% | 14% | 7% | 21% | - | - | - | - | - | 7% | - |
| Overall (439) | 10% | 1% | 7% | 9% | 15% | 8% | 4% | 34% | 1% | 1% | *% | 1% | 5% | 2% | 5% |

* 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 so 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. Nearly two thirds [61%] of those respondents that did visit in 2009 stayed in the area for between *4-7 nights*, 17% stayed for a short break of *1-3 nights* and 10% visited for a *day trip*. **The average length of stay in 2009 was 5.55 nights**, which is an increase on 2008's average length of stay, which was 5.04 nights. In 2008, 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*, which could indicate that people were generally staying for longer in 2009. In 2007 48% stayed for 5-7 nights, 29% stayed for 1-4 nights and 10% visited for a day trip. 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*.

Q8. What type of accommodation did you use?

Q8 was only asked of respondents that visited Pembrokeshire in 2009, for an overnight visit, as stated in Q6. (Note the low bases for all categories)

| | Hotel % | B&B/GHse % | SC % | C&C % | VFR % | Own a/c % | Youth hostel % | Other % | CR* % |
|----------------------|------------|------------|------------|------------|-----------|-----------|----------------|-----------|-----------|
| INFO (12) | 20% | 30% | 30% | - | 10% | 10% | - | - | - |
| PH (17) | 29% | 47% | 12% | 6% | 6% | - | - | - | - |
| TBDM (18) | 24% | 35% | 18% | 18% | 6% | - | - | - | - |
| AOS (20) | 13% | 38% | 13% | 25% | 6% | - | - | 6% | - |
| UKHC (21) | 50% | 44% | 6% | - | - | - | - | - | - |
| OPS (18) | 33% | 33% | 13% | 7% | 13% | - | - | - | - |
| TB (5) | 60% | - | - | 20% | - | 20% | - | - | - |
| RDP (13) | 18% | - | 9% | 45% | 18% | 9% | - | - | - |
| IL (12) | 20% | 20% | - | 40% | 20% | - | - | - | - |
| PRM (9) | 13% | 25% | - | 25% | - | 25% | - | - | 13% |
| CRR (15) | 33% | 25% | 17% | 8% | - | 8% | - | - | - |
| CIC (15) | 46% | 15% | 8% | 23% | 8% | - | - | - | - |
| ESHC (17) | 33% | 27% | 7% | 20% | 7% | - | - | - | 7% |
| ETBH (13) | 36% | 36% | - | 18% | 9% | - | - | - | - |
| WTGB (19) | 19% | 38% | 19% | 13% | 13% | - | - | - | - |
| BO (12) | 14% | 43% | - | 14% | 29% | - | - | - | - |
| BDM (20) | 27% | 27% | 13% | 33% | - | - | - | - | - |
| TIC (65) | 27% | 25% | 20% | 16% | 11% | - | 2% | - | - |
| VP (62) | 18% | 27% | 22% | 22% | 2% | 4% | 2% | 2% | - |
| OX (11) | 11% | 33% | 22% | 11% | 11% | 11% | - | - | - |
| Overall (394) | 26% | 29% | 15% | 18% | 7% | 3% | 1% | 1% | 1% |

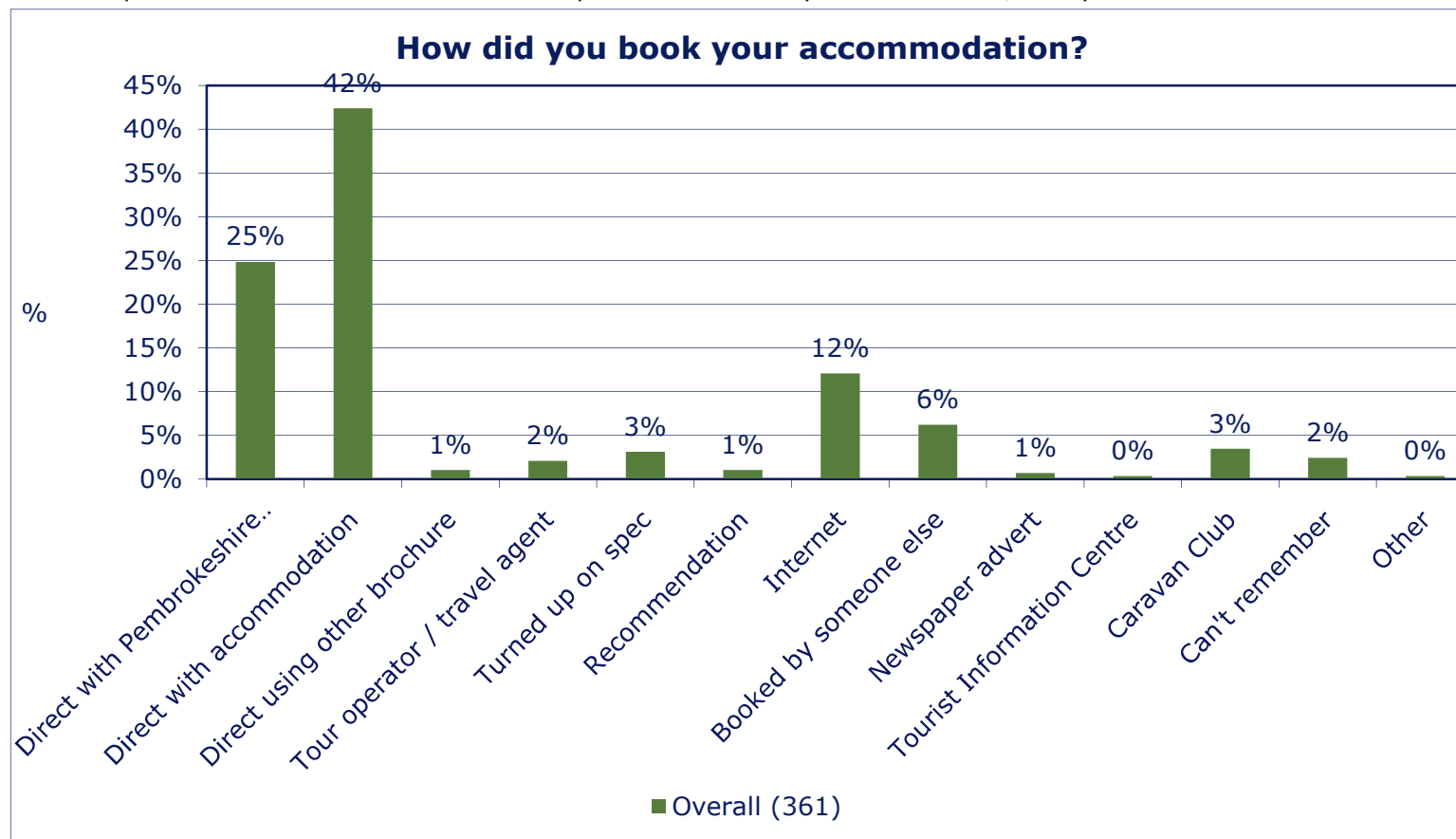
The option for Holiday Parks received no response so there is no data for this option.

As was the case in 2008, 2009 has seen another increase in the number of people choosing to stay in B&B/Guesthouse accommodation with 29% choosing this type of accommodation in 2009 as opposed to 27% in 2008, 18% in 2007 and 16% in 2006. 26% stayed in hotel accommodation, 18% stayed in Caravan & Camping accommodation and 15% stayed in Self catering accommodation.

The same types of accommodation were popular in 2008, 2007 and 2006. In 2008 33% stayed in hotels, 27% in B&B/Guesthouse accommodation, 15% chose caravan and camping and 14% chose self catering. 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.

Q10. How did you book your accommodation?

Q10 was only asked of respondents that visited Pembrokeshire in 2009, for an overnight visit, as stated in Q6. Please note that this question was not asked to those respondents that stayed with friends/family or own their own accommodation



Respondents indicated that the most popular way to book their accommodation was *directly with the accommodation provider*, as demonstrated by 42%. 25% booked their accommodation *using the Pembrokeshire brochure*.

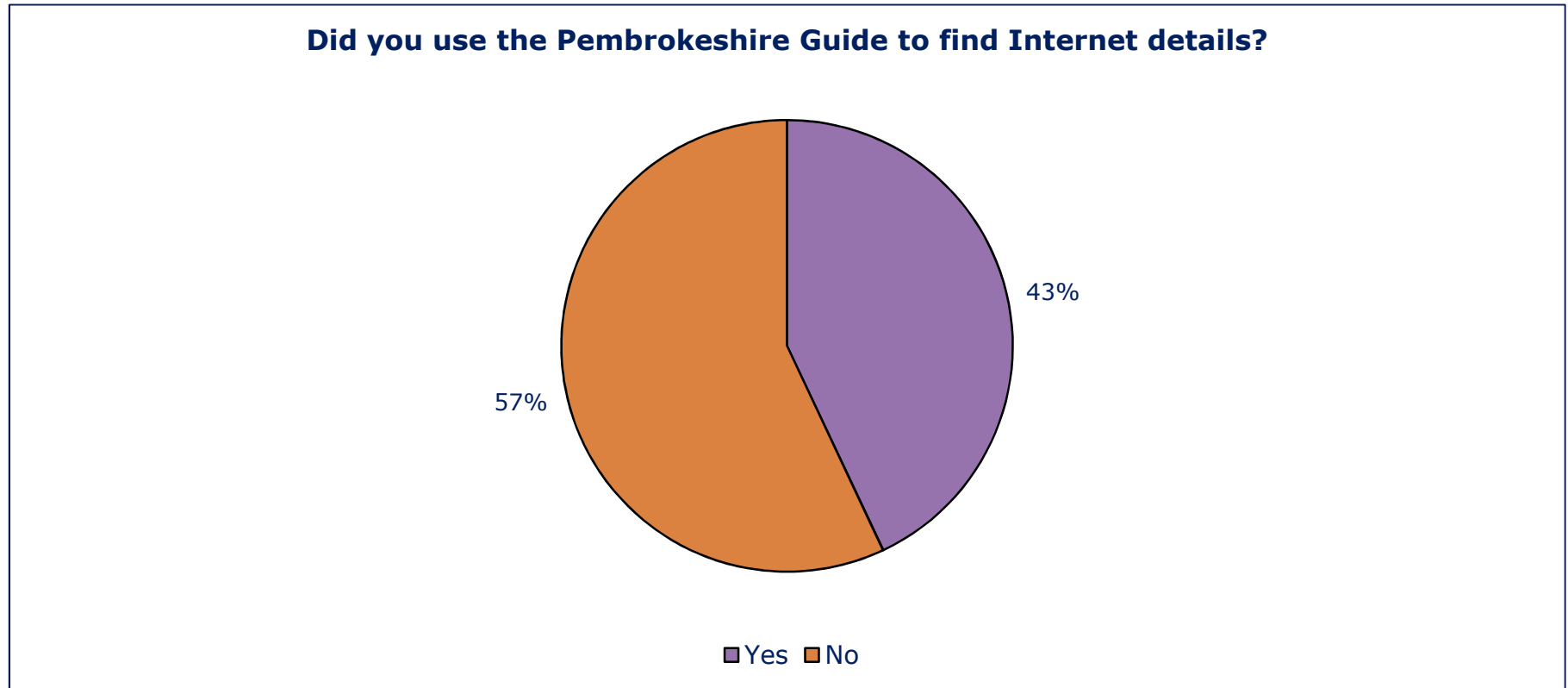
This is an increase on the 33% that booked *directly with the accommodation provider* in 2008 and also on the 24% that booked using this method in 2007. 2009 has seen a slight decrease in the number of people using the *Pembrokeshire brochure* to book their accommodation with 28% preferring this option in 2008. It is still an increase on the 22% that stated this in 2007 though. In 2006, 41% booked *directly with the accommodation provider* and only 16% used the *Pembrokeshire brochure*.

* The results have been displayed as an overall picture due to small individual bases.

It's interesting to see the use of the *Internet* rising again after the decline recorded in 2008. 12% booked their accommodation via the *Internet* in 2009, whereas only 6% stated they used the *Internet* in 2008, as opposed to 9% in 2007 and 12% in 2006. Please note that Q11 asked respondents to specify what 'other' way they booked their accommodation. Only 1 respondent selected this option and they specified that it was a *Timeshare*.

Q12: Did you use the Pembrokeshire Guide to find Internet details?

Q12 was only asked of respondents that used the Internet to book their accommodation, as stated in Q10.



35 respondents stated that they booked their accommodation via the Internet. 43% of those respondents [15 respondents] that booked their accommodation via the Internet did use the Pembrokeshire guide to find Internet details. 57% [20 respondents] did not use the guide to find Internet details, which means that they used other means to source and book their accommodation.

Q13: How many people were there in your party?

Q13 was only asked of respondents that Pembrokeshire in 2009, 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* % |
|----------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|---------------|-----------|
| INFO (14) | 7% | 64% | - | 21% | - | - | - | - | - | - | - | 7% |
| PH (18) | 11% | 78% | - | - | - | - | - | 11% | - | - | - | - |
| TBDM (20) | - | 100% | - | - | - | - | - | - | - | - | - | - |
| AOS (20) | 10% | 50% | 15% | - | 5% | 15% | - | - | - | - | - | 5% |
| UKHC (24) | 8% | 75% | 8% | - | - | 4% | - | - | - | - | - | 4% |
| OPS (22) | 9% | 68% | 14% | - | - | 5% | - | - | - | - | 5% | - |
| TB (6) | 17% | 67% | - | - | - | - | - | - | - | - | 17% | - |
| RDP (17) | 6% | 18% | 12% | 24% | 12% | - | 6% | - | - | - | 12% | 12% |
| IL (14) | 7% | 43% | 14% | 29% | - | 7% | - | - | - | - | - | - |
| PRM (12) | - | 67% | 8% | 17% | - | - | - | - | - | 8% | - | - |
| CRR (20) | 15% | 60% | 5% | 5% | 5% | - | - | - | - | - | - | 10% |
| CIC (19) | 11% | 63% | 21% | 5% | - | - | - | - | - | - | - | - |
| ESHC (19) | - | 63% | 5% | 21% | - | 5% | - | - | 5% | - | - | - |
| ETBH (14) | 7% | 71% | - | 21% | - | - | - | - | - | - | - | - |
| WTGB (25) | 8% | 64% | 12% | - | - | - | - | 4% | - | 8% | - | 4% |
| BO (13) | - | 62% | - | - | 8% | 15% | - | - | - | - | - | 15% |
| BDM (20) | - | 70% | - | 10% | 10% | - | - | 5% | - | - | - | 5% |
| TIC (65) | 2% | 69% | 6% | 12% | - | - | - | 2% | - | 2% | 5% | 3% |
| VP (63) | - | 62% | 14% | 8% | 3% | 3% | - | 2% | 5% | 2% | - | 2% |
| OX (14) | 14% | 64% | - | 14% | - | 7% | - | - | - | - | - | - |
| Overall (439) | 5% | 65% | 8% | 9% | 2% | 3% | * | 1% | 1% | 1% | 2% | 3% |

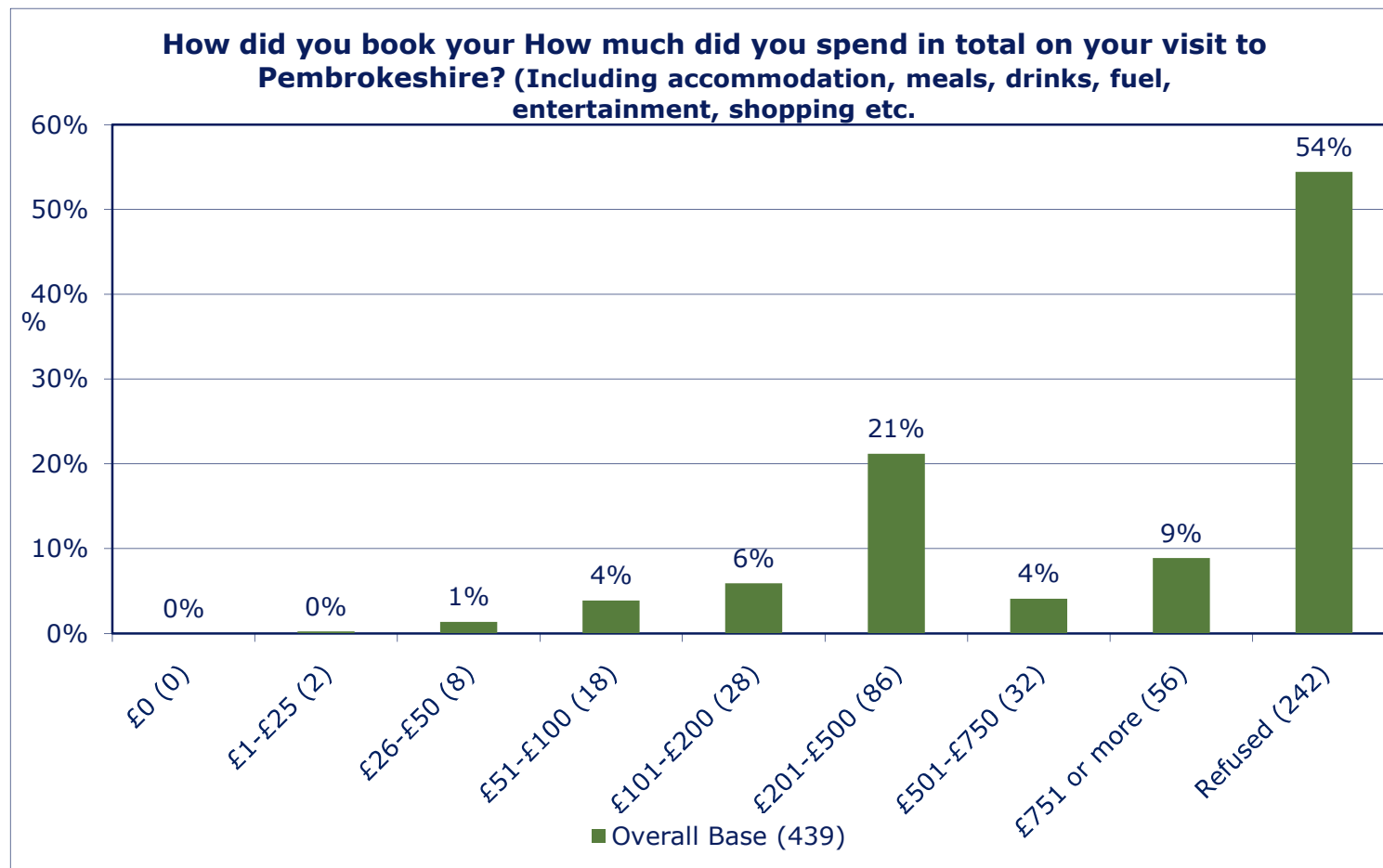
* Denotes a value of less than one percent but has a value greater than zero

65% of those respondents that visited Pembrokeshire in 2009 did so in a party size of *two people* and 9% visited in a party size of *4 people*. **Overall, the average number of people per visit in 2009 was 2.97.** 7 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 12 to 45 people with 3 respondents travelling in a party size of 25 people or more.

These figures are very similar to those returned in 2008, 2007 and 2006. In 2008, 60% of respondents visited in a party size of 2 and 16% travelled in a group of 4 people. 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.

Q15: How much did you spend in total on your visit to Pembrokeshire? (Including accommodation, meals, drinks, fuel, entertainment, shopping etc.)

Q15 was only asked of respondents that visited Pembrokeshire in 2009, as stated in Q1.



21% of those respondents that did provide information stated that they spent between £201-£500, per trip. 9% stated that they spent £751 or more, in total, per trip, whereas only 5% 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 2009 was £33.06, which is slightly less than the average of £40.96 recorded in 2008.

For day visitors, the average spend per person, in 2009 was £41.78, which is again lower than the average of £50.62 that was recorded in 2008.

It is worth noting that some fairly large amounts were quoted in this year's research, which will have had an effect on the average spend figure returned.

Getting 'spend' data is a real challenge in research with most respondents choosing to refuse to offer information (54% overall in this case).

Q16: What was it about Pembrokeshire that persuaded you to visit?

Q16 was only asked of respondents that visited Pembrokeshire in 2009, 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 % |
|----------------------|-------------------|-------------|----------------------|---------------------|-----------|-----------------|------------------|-----------|-----------|--------------|---------------------|-----------|-----------|
| INFO (14) | 14% | - | 14% | 50% | - | - | 7% | 7% | - | - | 7% | - | - |
| PH (18) | 17% | - | - | 28% | - | 11% | 22% | - | - | - | 11% | 6% | 6% |
| TBDM (20) | - | 5% | - | 30% | - | - | 35% | 5% | - | 5% | 20% | - | - |
| AOS (20) | 10% | - | - | 60% | - | 5% | 15% | 5% | - | - | 5% | - | - |
| UKHC (24) | - | - | - | 29% | 8% | 4% | 25% | - | - | 4% | 13% | 13% | 4% |
| OPS (22) | - | - | - | 41% | - | - | 23% | 9% | - | - | 14% | 9% | 5% |
| TB (6) | - | - | - | 17% | - | 17% | - | 50% | - | - | - | - | 17% |
| RDP (17) | 6% | - | - | 24% | - | - | 35% | 24% | - | - | - | 6% | 6% |
| IL (14) | - | - | 14% | 50% | - | - | 14% | 14% | - | - | - | - | 7% |
| PRM (12) | - | - | 8% | 42% | 25% | - | 8% | - | - | 8% | - | - | 8% |
| CRR (20) | 15% | 5% | - | 40% | 5% | - | 10% | 10% | - | 5% | - | 5% | 5% |
| CIC (19) | - | - | - | 42% | - | - | 32% | 5% | - | - | 21% | - | - |
| ESHC (19) | - | - | 5% | 47% | - | 5% | 11% | 5% | - | - | 16% | 5% | 5% |
| ETBH (14) | - | - | - | 36% | - | - | 36% | 21% | - | 7% | - | - | - |
| WTGB (25) | 4% | - | - | 40% | 8% | 4% | 20% | 8% | - | 12% | - | - | 4% |
| BO (13) | - | - | 8% | 15% | - | 8% | 23% | 31% | - | - | 8% | 8% | - |
| BDM (20) | - | - | - | 25% | 5% | - | 15% | 5% | 5% | 20% | 25% | - | - |
| TIC (65) | - | 2% | - | 37% | 8% | 2% | 25% | 11% | 2% | 3% | 8% | 2% | 3% |
| VP (63) | - | - | 3% | 27% | 14% | 3% | 21% | 5% | - | 5% | 14% | 3% | 5% |
| OX (14) | - | 7% | 7% | 21% | 7% | - | 14% | 7% | 7% | 7% | 14% | 7% | - |
| Overall (439) | 3% | 1% | 2% | 35% | 5% | 3% | 21% | 9% | 1% | 4% | 10% | 3% | 3% |

Over a third [35%] of those respondents that did visit in 2009 stated that they were persuaded to visit because of the *beaches/coastline*. A further 21% were *repeat visitors* and 10% had *never been before*. In 2008, 33% of respondents 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*. Although, the percentages have changed, the reasons have pretty much stayed the same.

In 2007, 27% were persuaded by the *beaches and coastline* and 24% were persuaded by a *previous visit*. In 2006 28% of respondents stated that they chose to visit because of the *sightseeing* (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, 33% in 2008 and 21% in 2009.

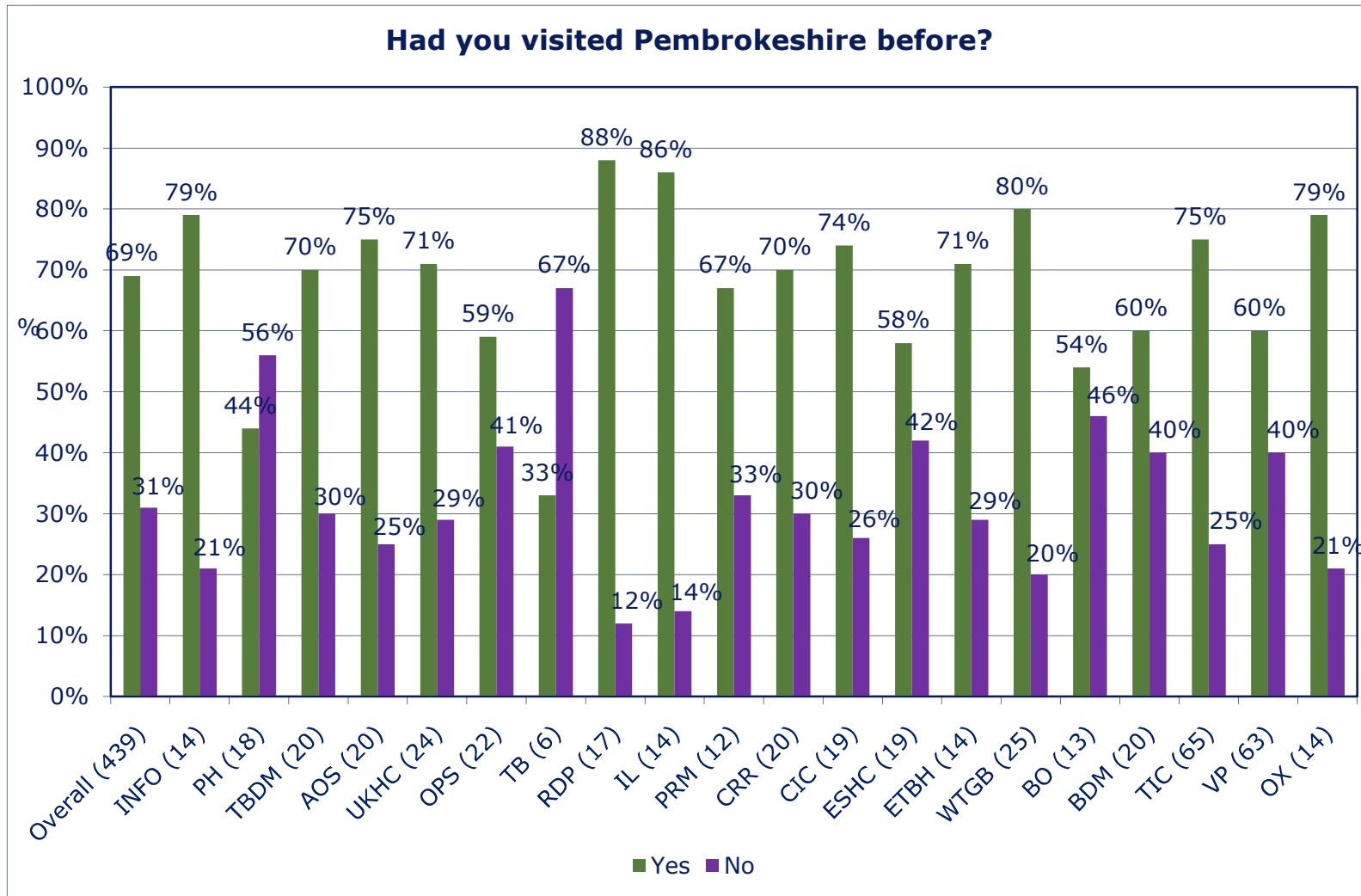
Q17: Please specify the 'other' reason why you decided to visit Pembrokeshire

15 respondents [3%] stated that there was another reason why they decided to visit Pembrokeshire. Those respondents were then asked to specify what persuaded them to visit Pembrokeshire and the following answers were provided:

- Work [4 respondents]
- Live very near
- Went with an archaeology group for an excavation project
- Was just passing through
- To race Pembray race circuit
- Resident of the area
- A television programme on Pembrokeshire
- School study project
- Business
- To visit a theme park
- Recommendation from friends
- To scatter fathers ashes

Q18: Had you visited Pembrokeshire before?

Q18 was only asked of respondents that visited Pembrokeshire in 2009, as stated in Q1 (Note the low bases for all categories)

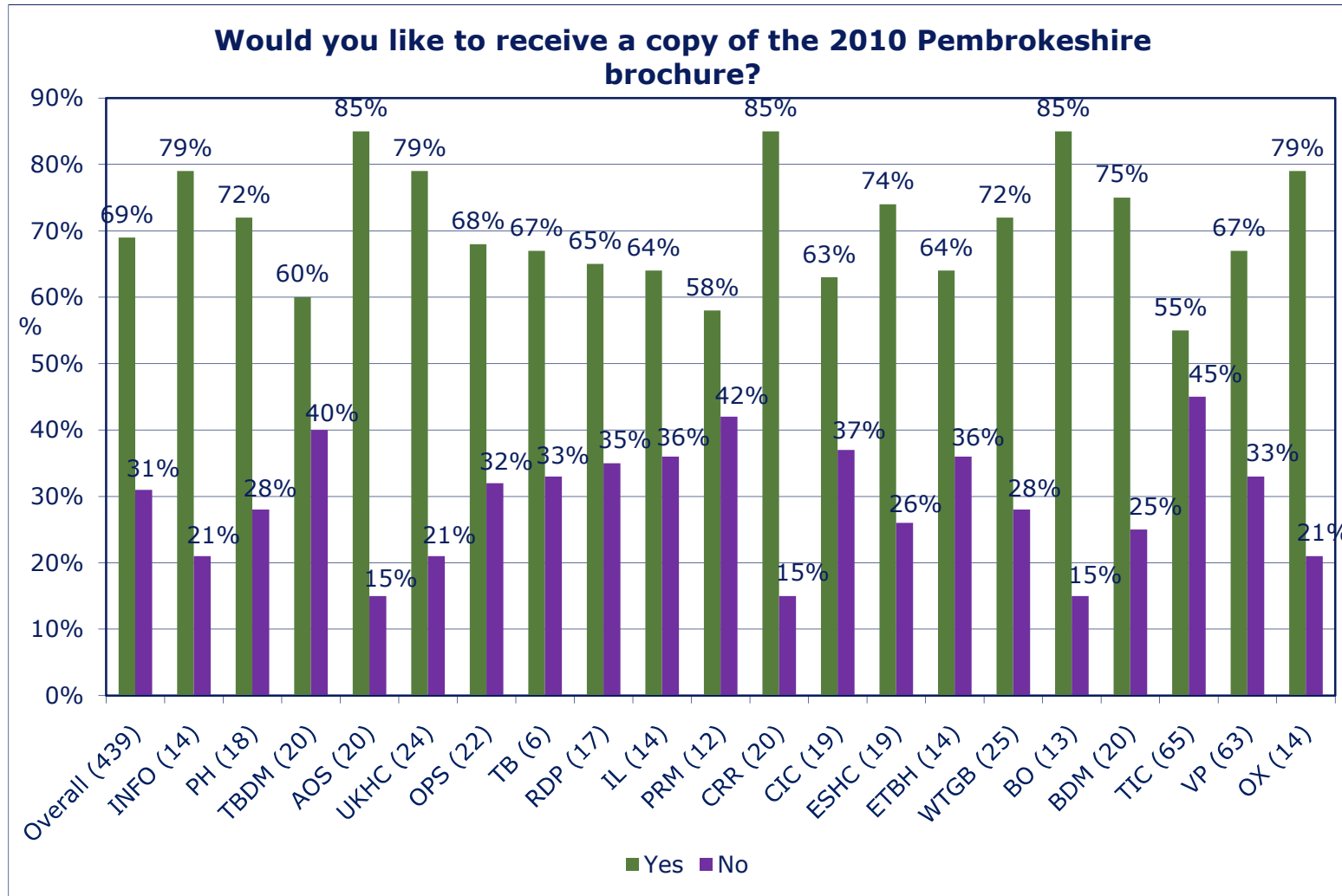


Overall, 69% of those respondents that visited in 2009 had visited Pembrokeshire before, which is a significant decrease on the 82% that was recorded in 2008 and the 78% and 75% in 2007 and 2006 respectively.

The previous years research has highlighted a continuing pattern of repeat visitors, however, this year's research shows a higher percentage of first time visitors to the area.

Q19: Would you like to receive a copy of the 2010 Pembrokeshire brochure?

Q19 was only asked of respondents that visited Pembrokeshire in 2009, 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 2010 Pembrokeshire brochure. Overall, 69% stated this, which is a slight decrease on the 72% and 82% that wished to receive the guide in 2008 and 2007 respectively.

In total, 303 requests for the 2010 brochure have been received as a result of this question.

Q20: How likely are you to visit Pembrokeshire again in the future?

Q20 was only asked of respondents that visited Pembrokeshire in 2009, 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 % |
|----------------------|------------------|-------------------|-------------------------------------|-----------------|------------------------|-----------------|
| INFO (14) | 57% | 36% | 7% | - | - | - |
| PH (18) | 17% | 44% | 33% | 6% | - | - |
| TBDM (20) | 15% | 70% | 15% | - | - | - |
| AOS (20) | 10% | 85% | 5% | - | - | - |
| UKHC (24) | 42% | 50% | - | 8% | - | - |
| OPS (22) | 14% | 73% | 14% | - | - | - |
| TB (6) | 83% | 17% | - | - | - | - |
| RDP (17) | 59% | 29% | 6% | 6% | - | - |
| IL (14) | 64% | 29% | 7% | - | - | - |
| PRM (12) | 42% | 33% | 25% | - | - | - |
| CRR (20) | 30% | 60% | 10% | - | - | - |
| CIC (19) | 47% | 37% | 11% | 5% | - | - |
| ESHC (19) | 37% | 47% | 16% | - | - | - |
| ETBH (14) | 14% | 71% | 7% | 7% | - | - |
| WTGB (25) | 36% | 64% | - | - | - | - |
| BO (13) | 15% | 85% | - | - | - | - |
| BDM (20) | 20% | 70% | 10% | - | - | - |
| TIC (65) | 31% | 48% | 15% | 5% | - | 2% |
| VP (63) | 24% | 59% | 14% | 2% | - | 2% |
| OX (14) | 29% | 57% | - | 7% | 7% | - |
| Overall (439) | 31% | 55% | 11% | 3% | * | * |

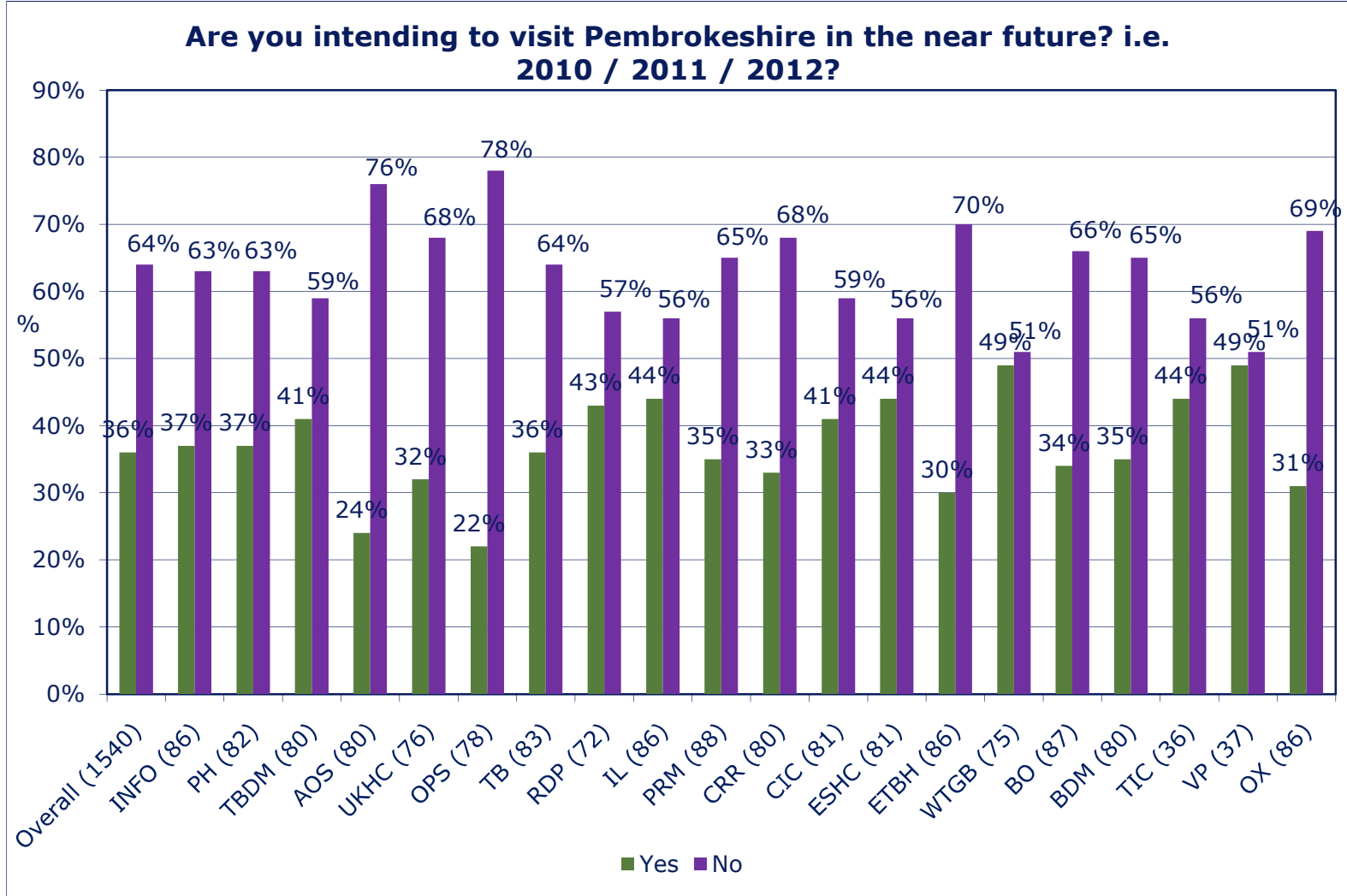
* Denotes a value of less than one percent but has a value greater than zero

55% of respondents that visited Pembrokeshire in 2009 said that they were *quite likely* to visit again in the future with a further 31% saying they were *very likely* to visit again. 3% said they were *not likely* to visit again in the future.

In 2008, 54% of respondents 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.

Q21: Are you intending to visit Pembrokeshire in the near future? i.e. 2010 / 2011 / 2012?

Q21 was only asked of respondents that did NOT visit Pembrokeshire in 2009, as stated in Q1. Note the low bases for all categories.)



36% of those respondents that did not visit Pembrokeshire in 2009 said that they intended to visit in the near future.

49% of those that responded via Where to go in Britain and a further 49% of those that responded via Visit Pembrokeshire stated that they intended to visit in the near future, whereas only 22% of those that responded via the Opinion Poll Survey said that they intended to visit in the near future

Q22: How many nights will you stay?

Q22 was only asked of respondents that did **NOT** visit Pembrokeshire in 2009, as stated in Q1 but intend to visit in 2010/2011/2012, as stated in Q21. (Note the low bases for all categories.)

| | DT % | 2 % | 3 % | 4 % | 5 % | 6 % | 7 % | 8 % | 9 % | 10 % | 11 % | 14 % | 15+ % | DK % |
|----------------------|-----------|-----------|------------|-----------|-----------|-----------|------------|-----------|----------|-----------|----------|-----------|----------|------------|
| INFO (32) | 3% | - | 6% | 9% | - | - | 63% | - | - | - | - | 9% | - | 9% |
| PH (30) | 3% | 10% | 3% | 13% | 10% | - | 53% | - | - | 3% | - | 3% | - | - |
| TBDM (33) | 9% | - | 15% | 9% | 6% | - | 39% | - | - | - | - | 12% | - | 9% |
| AOS (19) | - | 21% | 26% | 5% | - | - | 42% | - | - | - | - | 5% | - | - |
| UKHC (24) | - | 4% | 8% | 13% | 4% | 8% | 38% | - | - | - | - | 17% | - | 8% |
| OPS (17) | 6% | - | 12% | 6% | 6% | 12% | 24% | - | 6% | - | - | 12% | - | 18% |
| TB (30) | - | 10% | 7% | 7% | 7% | 3% | 27% | - | - | - | - | 7% | - | 33% |
| RDP (31) | - | - | 26% | 6% | 10% | 3% | 29% | - | - | - | - | 13% | - | 13% |
| IL (38) | 3% | 5% | 8% | 8% | 8% | - | 45% | - | - | - | - | 13% | - | 11% |
| PRM (31) | 3% | 3% | 6% | 3% | 6% | - | 35% | - | - | 6% | - | 6% | - | 29% |
| CRR (26) | - | 4% | 19% | 8% | 8% | 19% | 19% | - | - | 4% | - | 4% | - | 15% |
| CIC (33) | 3% | 9% | 15% | 6% | 6% | 3% | 45% | - | - | 3% | - | 9% | - | - |
| ESHC (36) | 3% | 6% | 3% | 22% | 11% | - | 36% | 3% | - | - | - | 6% | - | 11% |
| ETBH (26) | - | 4% | 8% | - | 12% | - | 62% | - | - | - | - | 8% | - | 8% |
| WTGB (37) | 8% | 5% | 11% | 14% | 5% | - | 46% | 3% | - | 3% | - | 5% | - | - |
| BO (30) | - | 3% | 10% | 7% | 3% | - | 37% | - | - | 7% | - | 7% | 3% | 23% |
| BDM (28) | 4% | 4% | 7% | 7% | 7% | 4% | 50% | - | - | - | - | - | 4% | 14% |
| TIC (16) | - | - | 13% | - | 6% | 6% | 38% | 6% | - | - | 6% | 13% | - | 13% |
| VP (18) | - | 6% | 6% | 11% | 6% | - | 50% | - | - | - | - | 11% | - | 11% |
| OX (27) | 7% | 4% | 4% | 11% | 4% | - | 44% | - | - | - | - | 7% | - | 19% |
| Overall (562) | 3% | 5% | 10% | 9% | 6% | 2% | 41% | 1% | * | 1% | * | 8% | * | 12% |

* Denotes a value of less than one percent but has a value greater than zero. DK=Don't Know

58% of those respondents that did not visit Pembrokeshire in 2009 but indicated that they do intend to visit in the future said they'd stay for a longer break between 4-7 nights. A further 15% said they'd stay for a shorter break of 2 to 3 nights. Please note that no respondents said they would stay for 1 night, 12 nights or 13 nights, which is why there is no data for these nights within the above table. 2 respondents said they would stay for 15 nights or more and when they were asked to specify exactly how long that would be, 1 respondent said they would stay for 17 nights and the other respondent said they would stay up to 21 nights.

Q24: How many people will there be in your party?

Q24 was only asked of respondents that did **NOT** visit Pembrokeshire in 2009, as stated in Q1 but intend to visit in 2010/2011/2012, as stated in Q21. (Note the low bases for all categories.)

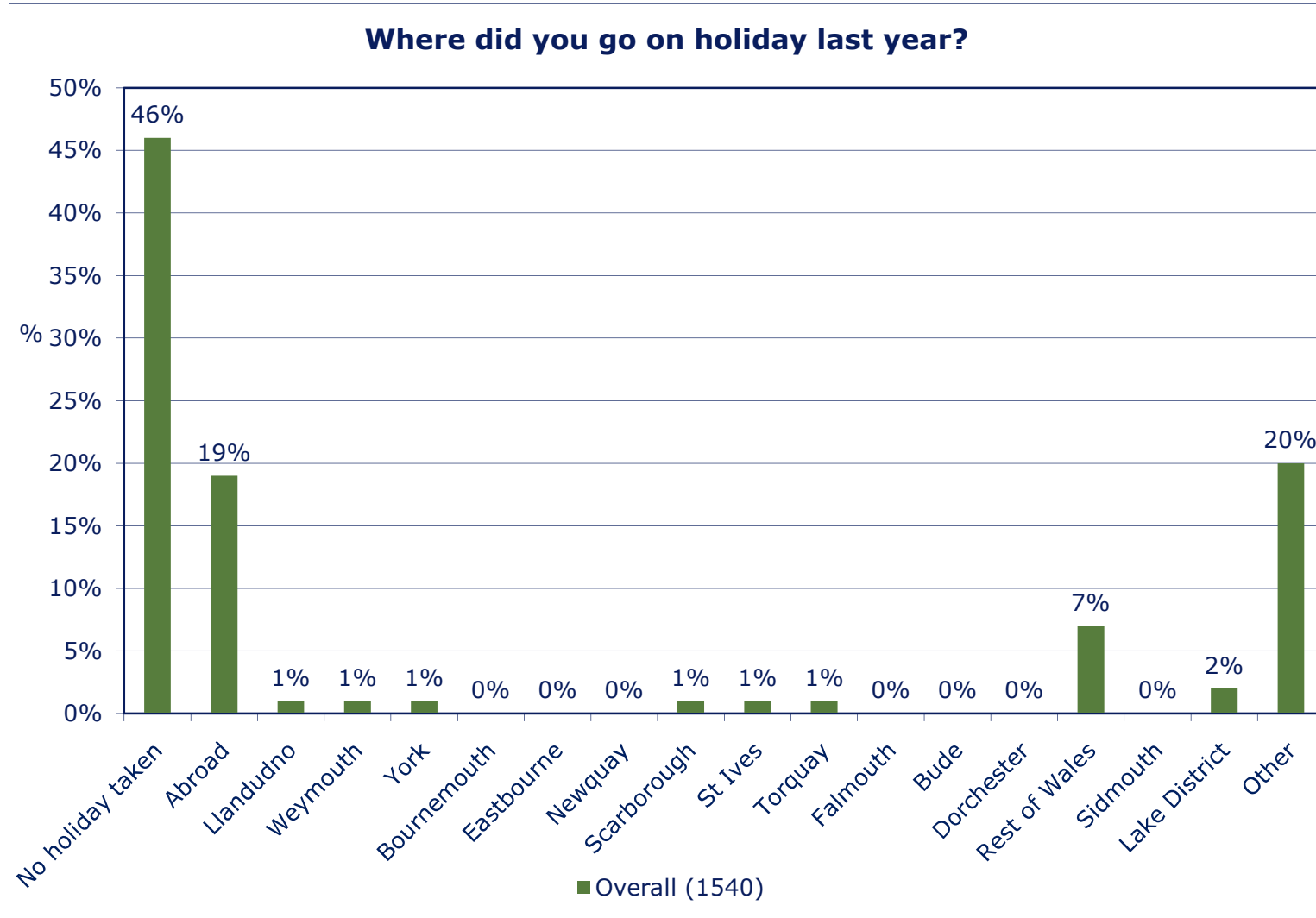
| | 1 person % | 2 people % | 3 people % | 4 people % | 5 people % | 6 people % | 7 people % | 8 people % | 11 People + % | CR* % |
|----------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|---------------------|-----------|
| INFO (32) | 9% | 81% | 3% | 3% | - | - | - | - | - | 3% |
| PH (30) | 10% | 77% | - | - | 7% | 3% | - | - | 3% | - |
| TBDM (33) | 6% | 82% | 6% | 3% | - | - | - | - | - | 3% |
| AOS (19) | 11% | 53% | - | 26% | 5% | 5% | - | - | - | - |
| UKHC (24) | 8% | 71% | 4% | 8% | 4% | 4% | - | - | - | - |
| OPS (17) | 12% | 71% | 6% | - | 6% | - | - | - | - | 6% |
| TB (30) | - | 67% | 3% | 17% | 3% | - | - | - | - | 10% |
| RDP (31) | - | 55% | 13% | 23% | 6% | - | - | - | - | 3% |
| IL (38) | 11% | 42% | 13% | 18% | 5% | 5% | - | 3% | 3% | - |
| PRM (31) | 10% | 48% | 10% | 10% | 3% | - | - | - | - | 19% |
| CRR (26) | - | 92% | - | 4% | - | 4% | - | - | - | - |
| CIC (33) | 3% | 58% | 6% | 21% | 3% | 3% | - | - | - | 6% |
| ESHC (36) | - | 81% | 6% | 8% | - | - | - | 3% | - | 3% |
| ETBH (26) | - | 88% | - | - | - | 4% | - | - | - | 8% |
| WTGB (37) | - | 70% | 5% | 16% | - | - | - | 3% | 5% | - |
| BO (30) | - | 43% | 7% | 13% | 10% | - | 3% | - | 3% | 20% |
| BDM (28) | - | 61% | 4% | 7% | 4% | 4% | - | - | - | 21% |
| TIC (16) | 19% | 50% | - | 13% | - | - | - | - | 6% | 13% |
| VP (18) | - | 33% | - | 50% | - | - | - | - | - | 17% |
| OX (27) | - | 41% | 19% | 15% | 7% | 4% | - | - | 7% | 7% |
| Overall (562) | 4% | 64% | 6% | 12% | 3% | 2% | * | 1% | 1% | 7% |

* Denotes a value of less than one percent but has a value greater than zero. DK=Don't Know

64% of those respondents that did not visit in 2009 but intend to visit in the near future said they would travel in a party of 2 people and a further 12% said they would travel in a group of 4 people. 8 respondents said they would travel in a group of 11+ people and when they were asked to specify how many people they would be travelling with, 3 respondents said they would be travelling with 15 people, 2 respondents said they'd travel with up to 15 people and the remaining 3 respondents said they'd travel with 20, 40 and 49 people.

Q26: Where did you go on holiday last year?

Q26 was only asked of respondents that did **NOT** visit Pembrokeshire in 2009, as stated in Q1.



This chart shows where respondents chose to go on holiday in 2009 instead of visiting Pembrokeshire

The findings showed that 46% *did not go on holiday* in 2009, which is an increase on the 37% recorded in 2008 and also on the 29% that was recorded in 2007. 19% went *abroad* in 2009, again showing a decrease on the 25% that went *abroad* in 2008 and 27% in 2007.

312 respondents (20%) selected 'other' when asked where they went on holiday in 2009. Those respondents were then asked to specify where they went and those destinations are detailed on the next page.

Q27: Please specify the 'other' place that you went on holiday last year?

Q27 was only asked of respondents that did NOT visit Pembrokeshire in 2009, as stated in Q1 and stated 'other' to Q26.

312 respondents (20%) selected 'other' when asked where they went on holiday in 2009. 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 Cornwall, Scotland, Devon, Norfolk and the Isle of Wight. The exact same alternative destinations were also specified in 2008.

Q27: Please specify the 'other' place that you went on holiday last year?

| Area | No' | Area | No' | Area | No' | Area | No' |
|----------------|-----|--------------------------|-----|-----------------|-----|--------------------|-----|
| Cornwall | 48 | Dawlish | 2 | Cromer | 1 | Northamptonshire | 1 |
| Scotland | 35 | Guernsey | 2 | Dartmoor | 1 | Northern Ireland | 1 |
| Devon | 26 | Isle of Man | 2 | Dartmouth | 1 | Norwich | 1 |
| Norfolk | 20 | Northumbria | 2 | Dumfries | 1 | Nottingham | 1 |
| Isle of Wight | 11 | Shropshire | 2 | Durham | 1 | Oxfordshire | 1 |
| Can't remember | 10 | Sussex | 2 | Eastbourne | 1 | Penrynpool | 1 |
| Dorset | 9 | Tenby | 2 | Exmoor | 1 | Penzance | 1 |
| Yorkshire | 8 | Alban | 1 | Folkestone | 1 | Pontins Greensands | 1 |
| Ireland | 7 | Ayr | 1 | Galloway | 1 | Port Maddock | 1 |
| Cotswolds | 5 | Barge holiday | 1 | Gloucestershire | 1 | Port Rush | 1 |
| Somerset | 5 | Bath | 1 | Hampshire | 1 | Portsmouth | 1 |
| London | 4 | Birmingham | 1 | Has own boat | 1 | Richmond | 1 |
| Northumberland | 4 | Blue Anchor, nr Minehead | 1 | Haye on Wye | 1 | Rye | 1 |
| Paignton | 4 | Boss Castle | 1 | Ilfracombe | 1 | Shaldon | 1 |
| Cumbria | 3 | Brighton | 1 | Jersey | 1 | Sherburne | 1 |
| Herefordshire | 3 | Bristol | 1 | Lewes | 1 | Skegness | 1 |
| Kent | 3 | Brixton | 1 | Lincolnshire | 1 | South Shields | 1 |
| Midlands | 3 | Bude | 1 | Liverpool | 1 | SOUTH WEST | 1 |
| Peak District | 3 | Buxton | 1 | Mablethorpe | 1 | Southampton | 1 |
| Derbyshire | 3 | Cambridge | 1 | Manchester | 1 | Staffordshire | 1 |
| Great Yarmouth | 3 | Canada | 1 | Midway | 1 | Suffolk | 1 |
| Wales | 3 | Canterbury | 1 | Monmouth | 1 | Surrey | 1 |
| Anglesey | 2 | Cheshire | 1 | Morecombe | 1 | Swansea | 1 |
| Blackpool | 2 | Colwyn Bay | 1 | Newcastle | 1 | Woolacombe | 1 |
| Bridlington | 2 | Conway | 1 | Newquay | 1 | Worstershire | 1 |
| Cardiff | 2 | Coombe Park | 1 | North East | 1 | | |

Q28: How did you book your accommodation?

Q28 was only asked of respondents that did **NOT** visit Pembrokeshire in 2009, as stated in Q1. (Note the low bases for all categories)

| | A % | B % | C % | D % | E % | F % | G % | H % | I % | J % | K % | L % | O % | P % | Q % |
|-----------------------|------------|-----------|------------|------------|-----------|-----------|-----------|-----------|-----------|----------|----------|-----------|-----------|-----------|----------|
| INFO (86) | 40% | 8% | 14% | 13% | 3% | 5% | 10% | 1% | 2% | - | - | 1% | - | - | 2% |
| PH (82) | 40% | 4% | 13% | 17% | 2% | 5% | 4% | 2% | 5% | 2% | - | 1% | - | - | - |
| TBDM (80) | 29% | 8% | 16% | 23% | 3% | 5% | 5% | 1% | 5% | - | 1% | 1% | - | - | 1% |
| AOS (80) | 49% | - | 16% | 13% | 5% | 4% | 6% | - | 4% | - | - | 3% | - | - | - |
| UKHC (76) | 42% | 3% | 12% | 20% | 4% | 4% | 9% | 1% | 1% | - | - | 3% | - | - | - |
| OPS (78) | 45% | 1% | 26% | 17% | 1% | 1% | 4% | - | 1% | 1% | - | 1% | - | - | - |
| TB (83) | 48% | - | 10% | 8% | 5% | 2% | 19% | 1% | 2% | 2% | - | - | - | - | 1% |
| RDP (72) | 44% | 1% | 14% | 10% | 4% | 7% | 8% | 1% | 1% | 1% | - | - | - | - | - |
| IL (86) | 50% | - | 12% | 8% | 6% | 7% | 3% | 1% | 3% | 2% | - | 1% | - | - | 2% |
| PRM (88) | 57% | - | 8% | 14% | 6% | 5% | 7% | 1% | 1% | 1% | - | - | - | - | - |
| CRR (80) | 55% | 1% | 15% | 19% | 3% | 4% | - | 3% | - | - | - | 1% | - | - | - |
| CIC (81) | 43% | 7% | 6% | 22% | 5% | 2% | 4% | - | 4% | - | 1% | 1% | - | - | - |
| ESHC (81) | 36% | 7% | 20% | 10% | 5% | 6% | 6% | 1% | 4% | - | - | 2% | - | - | - |
| ETBH (86) | 43% | 1% | 19% | 21% | 2% | 5% | 2% | - | 5% | - | - | - | - | - | - |
| WTGB (75) | 43% | 7% | 13% | 16% | 7% | 4% | 7% | - | - | - | - | - | - | - | - |
| BO (87) | 52% | 2% | 15% | 8% | - | 2% | 14% | 3% | 2% | - | - | 1% | - | - | - |
| BDM (80) | 43% | 3% | 15% | 18% | 1% | 4% | 4% | - | 5% | 1% | 1% | 3% | - | - | - |
| TIC (36) | 39% | 17% | 3% | 22% | 6% | - | 6% | - | 3% | - | - | - | - | - | - |
| VP (37) | 41% | 3% | 14% | 24% | 3% | - | 16% | - | - | - | - | - | - | - | - |
| OX (86) | 53% | - | 20% | 9% | 2% | - | 9% | 1% | 1% | - | - | 1% | - | - | - |
| Overall (1540) | 45% | 3% | 14% | 15% | 4% | 4% | 7% | 1% | 3% | * | * | 1% | 0% | 0% | * |

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 45% of those that did not visit Pembrokeshire in 2009 *did not go on holiday*, 15% booked their accommodation elsewhere *directly with the accommodation provider*, 14% booked using a *tour operator/travel agent* and 7% used the *Internet*. 9 respondents said there was an 'other' way that they booked their accommodation. When they were asked to provide further detail, the following responses were provided; through their bowling group, through Link Club, via an advert in Waitrose Magazine, using Marriott hotel vouchers, 3 respondents only visited for a day trip and a further 2 respondents travelled with their own touring caravan.

Q30: What was the main reason for deciding not to visit Pembrokeshire during 2009?

Q30 was only asked of respondents that did **NOT** visit Pembrokeshire in 2009, as stated in Q1. (Note the low bases for all categories)

| | A % | B % | C % | D % | E % | F % | G % | H % | I % | J % | K % |
|-----------------------|------------|------------|------------|------------|-----------|-----------|-----------|-----------|-----------|------------|-----------|
| INFO (86) | 13% | 14% | 23% | 15% | 1% | 3% | 10% | 2% | 6% | 8% | 3% |
| PH (82) | 12% | 26% | 12% | 13% | 1% | 1% | 7% | - | 4% | 22% | 1% |
| TBDM (80) | 18% | 11% | 15% | 15% | 1% | - | 4% | 3% | - | 33% | 1% |
| AOS (80) | 14% | 25% | 10% | 15% | 5% | 3% | 4% | - | - | 23% | 3% |
| UKHC (76) | 13% | 22% | 9% | 16% | 3% | 5% | 5% | - | - | 25% | 1% |
| OPS (78) | 23% | 24% | 6% | 13% | - | 5% | 3% | - | - | 23% | 3% |
| TB (83) | 27% | 27% | 12% | 7% | 11% | 2% | 5% | - | 1% | 7% | 1% |
| RDP (72) | 18% | 25% | 21% | 8% | 8% | 7% | 6% | 1% | 1% | 4% | - |
| IL (86) | 14% | 23% | 12% | 16% | 5% | 3% | 13% | - | 6% | 7% | 1% |
| PRM (88) | 18% | 39% | 6% | 7% | 5% | 7% | 7% | 1% | - | 10% | 1% |
| CRR (80) | 9% | 29% | 5% | 21% | 1% | 5% | 3% | 8% | - | 20% | - |
| CIC (81) | 9% | 27% | 21% | 9% | 2% | 2% | 6% | 2% | 2% | 17% | 1% |
| ESHC (81) | 19% | 15% | 22% | 19% | - | 7% | 7% | 1% | 1% | 9% | - |
| ETBH (86) | 16% | 29% | 3% | 10% | 2% | 3% | 6% | 1% | - | 27% | 1% |
| WTGB (75) | 13% | 17% | 8% | 19% | 3% | 12% | 1% | 7% | - | 20% | - |
| BO (87) | 15% | 38% | 16% | 8% | 5% | - | 2% | 2% | - | 13% | 1% |
| BDM (80) | 8% | 25% | 13% | 16% | 1% | 1% | 3% | 8% | 3% | 21% | 3% |
| TIC (36) | 6% | 19% | 14% | 17% | - | 6% | 3% | 3% | 3% | 25% | 6% |
| VP (37) | 14% | 24% | 3% | 16% | 3% | 5% | 5% | 3% | 3% | 16% | 8% |
| OX (86) | 24% | 35% | 3% | 10% | 1% | 6% | 5% | 1% | - | 14% | - |
| Overall (1540) | 15% | 25% | 12% | 13% | 3% | 4% | 5% | 2% | 1% | 17% | 1% |

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, 25% of respondents that did not visit Pembrokeshire in 2009 *did not go on holiday* in 2009, a further 17% found *elsewhere more appealing*, 15% *went abroad* and 13% didn't visit due to *illness/death in the family*. 12% stated that there was no particular reason for not visiting in 2009. These figures are very similar to those recorded in 2008 where 22% did not go on holiday, 22% went abroad, 21% had *no particular reason for not visiting* and 10% did not visit due to *illness/death in the family*.

Q31: Please specify the 'other' reason for deciding not to visit Pembrokeshire during 2008?

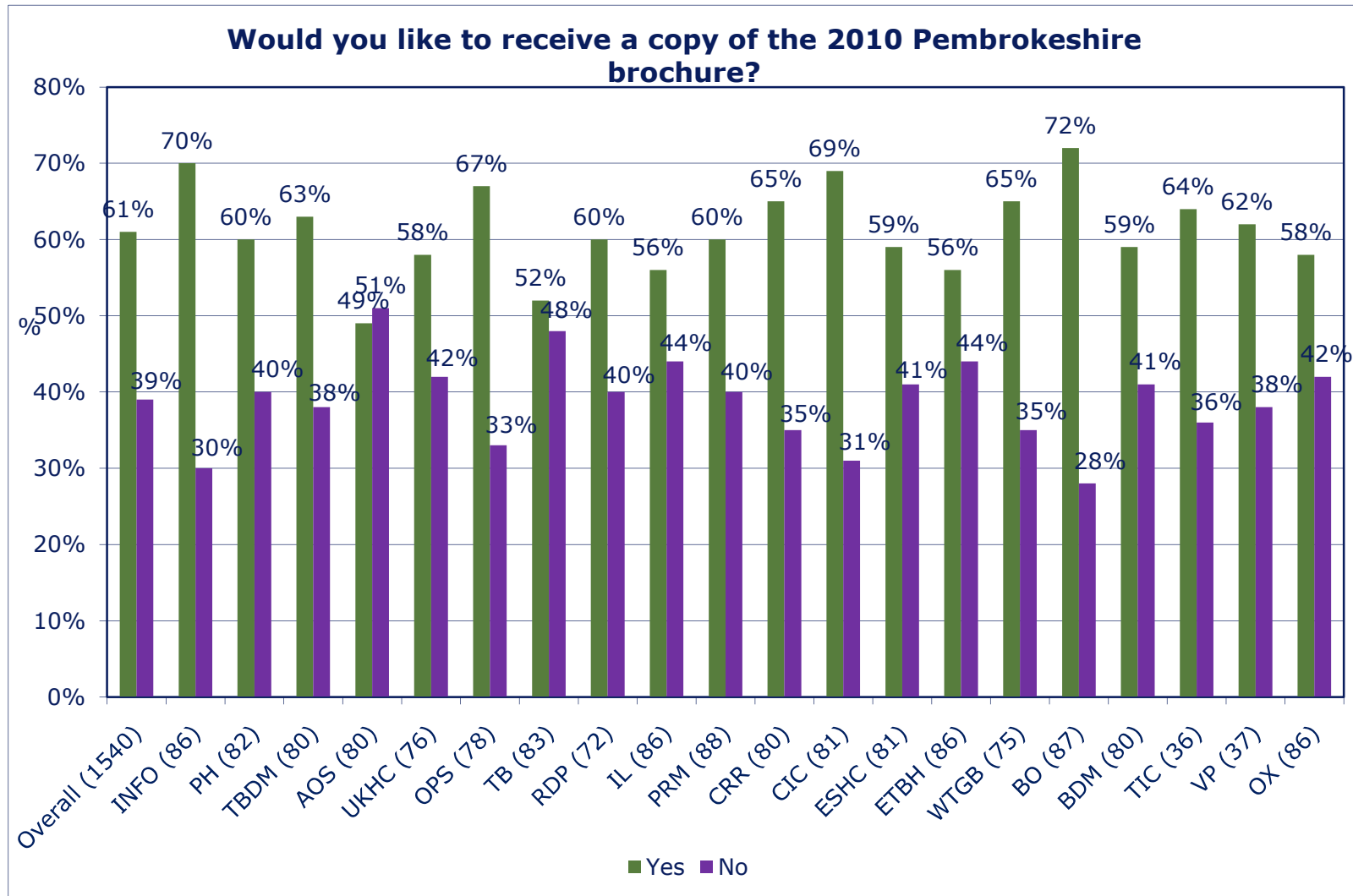
Q31 was only asked of respondents that did NOT visit Pembrokeshire in 2009, as stated in Q1 but stated 'other' to Q30. (Note the low bases for all categories)

23 respondents (1%) selected 'other' when asked what was the main reason for deciding not to visit Pembrokeshire during 2009. Those respondents were then asked to specify what that 'other' reason was and the responses included the following.

| | |
|------------------------------------------------------------------------|-----------------|
| Bad weather | [9 respondents] |
| The brochure was requested for someone else | [4 respondents] |
| The hotel they were going to stay in closed down | |
| Saving for Honeymoon in 2010 | |
| Too difficult to get to from Belfast | |
| Couldn't find suitable accommodation | |
| The trips available were too long, they wanted a shorter break | |
| Too expensive | |
| Motor home was having some problems | |
| A bit too expensive for the area they wanted to visit | |
| Couldn't find suitable accommodation for the time they wanted to visit | |
| Normally stay with friends, but they were away | |

Q32: Would you like to receive a copy of the 2010 Pembrokeshire brochure?

Q32 was only asked of respondents that did **NOT** visit Pembrokeshire in 2009, 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 2009 would like to receive a copy of the 2010 Pembrokeshire brochure. Overall, 61% stated this, which equates to 940 brochure requests.

Conversion Rates

| | Media Title | Total Survey | % Total Survey | Total Visitors | % Total Survey | % Total Visitors | Conversion |
|---------------|------------------------------|--------------|----------------|----------------|----------------|------------------|---------------|
| | Info (formerly Info Service) | 100 | 5.05% | 14 | 0.71% | 3.19% | 14.00% |
| | Planning A Holiday | 100 | 5.05% | 18 | 0.91% | 4.10% | 18.00% |
| | Take A Break - Direct Mail | 100 | 5.05% | 20 | 1.01% | 4.56% | 20.00% |
| | Axciom Online Survey | 100 | 5.05% | 20 | 1.01% | 4.56% | 20.00% |
| | The UK Holiday Collection | 100 | 5.05% | 24 | 1.21% | 5.47% | 24.00% |
| | Opinion Poll Survey | 100 | 5.05% | 22 | 1.11% | 5.01% | 22.00% |
| | Travelbrochures.co.uk | 89 | 4.50% | 6 | 0.30% | 1.37% | 6.74% |
| | RDP & CIC online Combined | 89 | 4.50% | 17 | 0.86% | 3.87% | 19.10% |
| | Information-link | 100 | 5.05% | 14 | 0.71% | 3.19% | 14.00% |
| | Prm Online Brochure Campaign | 100 | 5.05% | 12 | 0.61% | 2.73% | 12.00% |
| | Conversion Research Requests | 100 | 5.05% | 20 | 1.01% | 4.56% | 20.00% |
| | Consumer Info Centre Booklet | 100 | 5.05% | 19 | 0.96% | 4.33% | 19.00% |
| | Enjoy A Seaside Holiday Card | 100 | 5.05% | 19 | 0.96% | 4.33% | 19.00% |
| | Enjoy a Trad. British Hol CD | 100 | 5.05% | 14 | 0.71% | 3.19% | 14.00% |
| | Where to go in Britain | 100 | 5.05% | 25 | 1.26% | 5.69% | 25.00% |
| | BRADA online | 100 | 5.05% | 13 | 0.66% | 2.96% | 13.00% |
| | BRADA Direct Mail | 100 | 5.05% | 20 | 1.01% | 4.56% | 20.00% |
| | TIC Requests | 101 | 5.10% | 65 | 3.28% | 14.81% | 64.36% |
| | Visit Pembrokeshire | 100 | 5.05% | 63 | 3.18% | 14.35% | 63.00% |
| | Offer X | 100 | 5.05% | 14 | 0.71% | 3.19% | 14.00% |
| Totals | | 1979 | 100% | 439 | 22.18% | 100% | |

The conversion rate for 2009 was 22.18%, which is a slight increase of nearly 1% when compared to the 21.36% achieved in 2008. This rate is still lower than the 24.3% conversion rate achieved in 2007 and the 25.17% conversion rate achieved in 2006.

Conversion Rates Additional Information

Pembrokeshire 2009 Conversion Research Additional Information

- (a) A total number of **439** interviewed parties visited Pembrokeshire during 2009
- (b) The average number of people per party was **2.79**
- (c) The average number of nights stayed per party was **5.45**
- (d) Therefore, the number of visitor nights was **6,675.21**

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 15 about spend

- (a) A total number of **200** parties visited Pembrokeshire during 2009, and managed to recall their spend
- (b) The average number of people per party was **3.01**
- (c) The average number of nights stayed per party was **5.86**
- (d) Therefore, the number of complete visitor nights was **3,527.72**
- (e) The average total spend per party was **£501.22**
- (f) The average spend per person, per day was **£28.42**
- (g) The total expenditure for this conversion research was **£100,257.80**

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 1979 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 1979 interviews, 439 people visited Pembrokeshire in 2009.

3. Conversion rate

The overall conversion rate [as shown on page 4] is 22%. While we are not at liberty to divulge conversion rates from other clients, 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 [64.36% and 63% respectively], Where to go in Britain [25.00%] and The UK Holiday Collection [24.00%]. However, the lower conversion rates were seen from Travelbrochures.co.uk [6.74%], Prm Online Brochure Campaign [12.00%] and BRADA Online [13.00%], 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 £79,419.00. Costs for the Conversion Research Requests, TIC requests, Visit Pembrokeshire requests and staff costs are not included in the research, but should be borne in mind when considering the 2010/11 media schedule.

Analysis of Figures cont...

5. Actual response

111,341 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 Axiom Online Survey [26,946], the Pm Online Brochure Campaign [15,762] and Information-link [13,428].

6. Responses converted

Of the 111,341 brochures mailed, 21,301.57 were converted into bookings.

7. Fulfilment cost & production cost

The total cost of producing and fulfilling the 111,341 brochure requests was £147,638.17. This equates to £1.326 for each brochure. The total cost of producing and fulfilling the brochure requests, minus the income received for the guide was £73,373.72, which equates to £0.659 for each brochure.

8. Cost per response

Those media groups that do not have a media cost associated with them, such as the Conversion Research Requests and the TIC and Visit Pembrokeshire requests do not generate a cost per response. Outside of this though, the best CPR achieved was for Travelbrochures.co.uk, coming in at only £0.35 per response generated. The next best was the Axiom Online Survey achieving £0.38 per response. Other activity that achieved a CPR under £0.50 was the Take a Break Direct Mail (£0.42). All of the others achieved figures below £2 per response.

9. Cost of media + fulfilment & brochure production

The total cost of the media, fulfilment and brochure production was £152,792.72. Please note that these costs include the design and production of the 2009 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 Enjoy a Seaside Holiday Card went up from £1.57 to £2.22, which takes it over the £2 mark. To put that into perspective, £5 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 £8.42.

No activity in 2009 generated a cost per conversion over the £25 benchmark. The closest to this benchmark was BRADA Online [£16.89], which should be looked at again to see if this can be improved or whether it is worthwhile investing in this in 2010/11. The better performing ones include the TIC and Visit Pembrokeshire requests [£1.02 & £1.05 respectively], the Conversion Research Requests [£3.30] and Offer X [£4.71].

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

The direct Return on Investment purely for day visits equated to a total of £322,016.92. The equivalent for staying visits was £9,655,930.53, giving a total ROI figure of **£9,977,947.45**

This figure has come from a direct spend of £152,792.72 [media + fulfilment & production - income], but does not include staff time. The average ROI ratio was £100.90, but the overall ROI was £65.30, i.e. for every £1 spent on the marketing campaign, £65.30 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 2009 after requesting a brochure, they indicated their intent to visit in 2010, 2011 or 2012. 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 £66,455.58 and for staying visits at £7,155,873.76. [Note that this is over 2010, 2011 and 2012, not just 1 year]. The total VGI for the campaign has been calculated at **£7,222,329.35**

14. Overall campaign ROI

The return on investment, including the actual spend and VGI is **£17,200,276.80**. A not insignificant sum, from a media and fulfilment/production spend of £152,792.72.

15. Overall campaign ROI ratio

The overall campaign ROI, including value of good intentions was **£112.57**, i.e. for every £1 spent on the marketing campaign, £112.57 could be generated into the Pembrokeshire tourism economy.

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