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TENBY TOURISM GROWTH AREA ANALYSIS

EXECUTIVE SUMMARY

July 2011 - June 2012



Cronfa Amaethyddol Ewrop ar gyfer Datblygu
Gwledig: Ewrop yn Buddsoddi
mewn Ardaloedd Gwledig
The European Agricultural Fund for
Rural Development: Europe Investing in
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Llywodraeth Cymru
Welsh Government

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1. INTRODUCTION AND OBJECTIVES

In May 2011 the Destination Pembrokeshire Partnership Group commissioned Beaufort Research to conduct the Pembrokeshire Visitor Survey for 2011/12. The survey repeated – and built on – research conducted in previous years in the region.

The research assists the Partnership in its understanding of visitor's expectations, experiences and needs in the region and helps ensure that they deliver a targeted tourism product.

Specific objectives were:

- Measure the visitor's trip experience against expectations
- Identify strengths, weaknesses and areas for improvement to the Pembrokeshire tourism product
- Provide a profile of the types of visitor attracted to Pembrokeshire
- Understand the decision making process including information sources pre and during the trip
- Explore trip characteristics such as transport use, facility use, accommodation and activities undertaken

The survey ran from 1st July 2011 to 30th June 2012. This report is the report for the Tenby Tourism Growth Area using data from across the fieldwork period for selected sites in and around Tenby (listed in the appendix of this report). In addition to this report there are four Update Reports and a Full Report of all data across the county.

2. METHODOLOGY

The research universe was classed as those aged 16 or over, on a trip to/in Pembrokeshire either as a Staying or Day Visitor. The purpose of the trip was defined as *not* to go shopping or attend a routine appointment, on business or for study. For Day Visitors the respondent must have spent three or more hours away from home, including travel.

The survey was undertaken by means of a **two-stage** programme of interviewing. Initially visitors were interviewed face to face (Stage I) at interview points across Pembrokeshire split as follows:

- South Pembrokeshire: 50% of the interviews
- West Pembrokeshire: 33% of the interviews
- North Pembrokeshire: 17% of the interviews

For a full list of sampling points used on the survey please see the appendix. A target of 1,500 interviews was to be conducted during the course of the fieldwork.

A fifteen minute questionnaire was administered and a request made to follow-up the exercise with an online interview after the respondent had completed their trip. An invitation to this follow-up online interview (Stage II) was then emailed to the respondent 2-3 weeks after their initial interview and a link given to an online survey hosted by Beaufort Research. The reason for the two-stage approach was to enable a wider range of questions to be put to the respondent.

At the close of fieldwork a total of **1,861** interviews were conducted in Stage I with **236** going on to complete Stage II. In Tenby TGA there were **521** interviews in Stage I and with 55 in Stage II meaning that responses at this stage should be treated with caution.

3. MAIN FINDINGS

Tenby TGA benefits from a number of high profile family-based attractions within and immediately adjoining it. These sites have been included (amongst other sites) in the interview locations in 2011/12 in order to reflect the area.

Visitor profile

- While the Tenby TGA **appeals to visitors of all ages** its profile is younger than that of the region as a whole: nearly half are under 44 compared to just over a third across the county.
- Over **two thirds are ABC1** in the Tenby TGA – significantly higher than the UK average where half are ABC1 but lower than the region as a whole where nearly three quarters fall into this bracket.
- The **origin of visitors to the Tenby TGA mirrors that of the region as a whole** and the 2007/8 wave. The home market remains key with over half of all visitors from within Wales itself.
- **Tenby TGA benefits from a loyal visitor group:** a quarter of all visitors say they are regular visitors (they visit at least every month).

Visit profile

- **The visit profile remains unchanged since 2007/8** with day visitors accounting for just under a third of all visits.
- **Spend is down on 2007/8** with a higher daily spend on non-accommodation expenses compared to accommodation expenses (perhaps reflecting the inclusion of some attraction sites in the interviewing).

Rating the visit

- **The natural environment is key** to the visit experience as it is the region as a whole. Indeed there is little difference between Tenby TGA and Pembrokeshire overall. The only significant difference is the perceived importance (and performance) of the element *family friendly places to visit* which is more highly rated in Tenby TGA.
- **Tenby out-performs the region – slightly – on the three key aspects** including *warmth of welcome and friendliness, overall visit experience, overall value for money*. For nearly two thirds of visitors to Tenby TGA the region is seen to perform better than other UK destinations.

Information sourcing

- With a high proportion of repeat visits it is not surprising that **previous visits inform the current visit**. This is especially so for Tenby TGA where over a third (37%) are informed by a previous visit (which also mirrors the high proportion of visitors who come to the region regularly).
- **Information via apps is important**: nearly two thirds of visitors to Tenby TGA had mobile web access during their trip and of these over half had accessed the internet to find out things for their trip.

Activities

- Not surprisingly **visiting a family, theme or activities park** is a top mentioned activity with 44% mentioning this (compared to 24% across the region as a whole). However *going on a short walk (up to 2 hours)* remains the most-mentioned activity with a total of 60% mentioning this.

Accommodation

- **Tenby TGA has a slightly higher proportion of visitors in free accommodation**: 41% are not paying for accommodation compared to 37% across the region as a whole. The main form of free accommodation is *own static caravan* and *friends' or relatives' main home*.