PEMBROKESHIRE VISITOR SURVEY 2011-2012

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 Rural Areas

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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 visitors' 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 Full Report using data from across the fieldwork period. In addition to this report there are four Update Reports with results along the fieldwork period, and a Tenby TGA report with data for specific sites in and around the Tenby region.

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.

The research also included a complementary online qualitative research component to explore perceptions on specific topics in more detail among those who had taken part in stage 1.

3. MAIN FINDINGS

Visitor profile

- Pembrokeshire continues to **appeal to visitors of all ages** with the south of the county experiencing a slightly younger profile of visitor compared to the west and north. The age profile in 2011/12 mirrors that of 2003/4 with a slightly older profile than 2007/8.
- **Three quarters of visitors are in the ABC1 social class** compared to a UK average of approximately half the population. This difference continues to grow: the proportion of ABC1s has been on the increase since previous waves.
- The **home market remains key**: visitor origin has been split almost 50:50 between those from Wales and those outside Wales since 2007/8. Overseas visitors remain at around 5%. The perceived accessibility of Pembrokeshire is an important factor with the M4 and M5/6 corridors providing convenient routes to the region.
- There is an **increasing strength of attachment to the region** amongst its visitors: in 2011/12 a quarter now visit more than once a month (up from just under a fifth in 2007/8) and the proportions *very likely* to return to Pembrokeshire in the near future are at their highest levels.

Visit profile

- **Day trips continue to account for a quarter of all visits** with staying trips within Pembrokeshire accounting for nearly 70%. In 2011/12 Pembrokeshire is attracting a higher proportion of visitors who are staying outside the county: up from 5% in the previous wave to 13% in 2011/12.
- **There are signs of the recession** in the visitor data: spend on accommodation and non-accommodation is down on the previous wave (even before inflation is taken into account) and the average number of nights stayed has reduced from 6.8 in 2007/8 to 6.3 in 2011/12. Amongst staying visitors from the UK just under one in ten are on a *Staycation* in the region – that is they have substituted a holiday abroad for one in the UK. A further indication is a decline in the proportions who have done non-essential shopping since the 2007/8 wave.

Rating the visit

- **The natural environment is key** to the visit experience with elements such as *award winning beaches, a range of natural attractions* and *walking* viewed as the most important elements of the trip and also seen as the best performing elements of the trip.
- The importance and performance of a range of holiday elements show little seasonal variation, with the **performance of Pembrokeshire consistently exceeding people's expectations**. In 2007/8, seasonality was more pronounced.
- **Parking is the main negative issue** in the region. The Pembrokeshire Partnership may want to consider elements such as the cost and flexibility of parking: offering hourly tariffs alongside day tariffs and consider portable tickets so that a day ticket offered in one location is valid in another.

Information sourcing

- With a high proportion of repeat visits (85% have been before) it is not surprising that **previous visits inform the current visit**. The use of the web is rising with just over a fifth souring information this way prior to their visit. During the visit nearly two thirds have **mobile internet access** during their trip with nearly three in five using their mobiles to source trip information.
- Nearly **seven in ten** experienced problems with mobile phone reception during their visit.
- There has been a **decline in print information** since 2003/4 with brochures down from 12% to 4%
- Once in Pembrokeshire a third of visitors used a TIC with St Davids Oriel y Parc the most-mentioned centre. Ratings for the TIC service were good.

Activities

- With the natural environment playing an important part in motivating the trip and the enjoyment of the trip it follows that **activities are focused on enjoying the landscape**: over a quarter of visitors come to walk with one in ten coming to visit the beach and 8% visit natural attractions. Ratings for country paths and the Pembrokeshire Coast Path were very high.
- **The proportions undertaking walking has increased** as an activity between 2007/8 and 2011/12: with long walks (2+ hours) increasing from 23% to 30%.

Accommodation

- **Customer reviews were the most-mentioned source of information** on accommodation sourcing with nearly a third mentioning this.
- **Nearly two thirds stayed in paid accommodation** and a third in free accommodation: unchanged proportions since 2003/4 and 2007/8. In paid accommodation *self catering* remains the most popular type with over a quarter renting a self-catering cottage/ flat/ house.