

PEMBROKESHIRE & CORNWALL VISITOR SURVEYS 2011/12

COMPARING THE DESTINATIONS

February 2013



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Prepared for: **Visit Cornwall/ Destination
Pembrokeshire Partnership**

Client Contact: Emma Rojano/ Mark Horner

Prepared by: **Beaufort Research**

Agency contact: Claire Peate

2 Museum Place
Cardiff
CF10 3BG

Tel: (029) 37 6740

Fax: (029) 2037 0600

E-mail: enquiries@beaufortresearch.co.uk

Website: www.beaufortresearch.co.uk

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1. INTRODUCTION AND OBJECTIVES

1.1 Objectives

Beaufort Research were commissioned by the **Destination Pembrokeshire Partnership** and the **Cornwall Development Company** to conduct visitor surveys during 2011 and 2012 within the two counties.

Both surveys had the aim of helping the organisations to understand visitor's expectations, experiences and needs in the regions and help them in their work with other tourism organisations in delivering a targeted tourism product.

These two UK tourism destinations expressed an interest in sharing data in order to provide benchmarks for their own research and to further understand the climate in which they operate. As Beaufort Research delivered both surveys we have provided this topline report to highlight key findings.

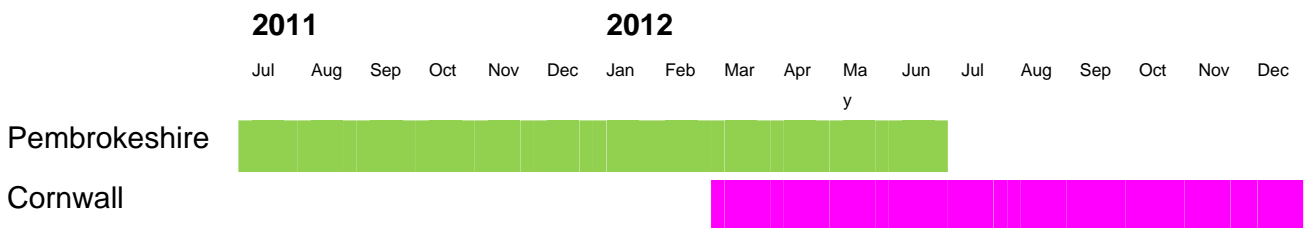
An important issue when comparing the two surveys (which were independently designed without intending comparisons to be made) is that some questions are not directly comparable: differences in question wording between the two surveys can have significant implications. For example the following questions are worded in ways that would elicit different responses:

Based on your current visit to Pembrokeshire how would you rate **award winning beaches**. Please use a scale of 1 – 10 where 1 = very poor and 10 = excellent.

Using the scale on this card how would you rate the **beaches** in Cornwall. 1 = very poor, 5 = very good.

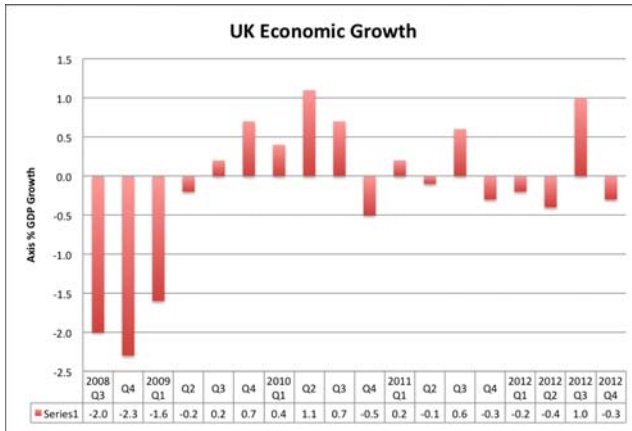
For this reason we have restricted the comparisons to those areas of the surveys that have the most synchronisation and can be said to be directly comparable.

The surveys ran for the following time period:



1.2 Research context

The economic and climatic backgrounds to this research are given below – both of which contributed negatively to the UK tourism market.



Source: ONS

During Q4 2011 and Q2 2012 the UK economy was in recession, with three successive quarters of negative growth. While the economy emerged from this pattern by Q3 2012 it was again in negative growth by the end of 2012.

As part of the ongoing financial situation the media continue to report on the subject of the Staycation – that is the substitution of a holiday abroad for a holiday within the UK.

Climatically, the UK weather was heavily influenced by the abnormal position of the Jet Stream (which has been in a lower position than normal since 2007). Summer 2012 was referred to in the media as the “lost summer” being the **wettest summer in 100 years** and temperatures well below average.

By the year end the Met Office confirmed that 2012 was the **second wettest year on record**.

The Telegraph

Autumn comes early after hot dry spring

Autumn colours are beginning to appear on trees several weeks early as a result of the hot dry spring, according to horticulturalists.

By Richard Gray, Science Correspondent
10:15AM BST 22 Aug 2012

Experts at the Royal Horticultural Society have reported leaves turning yellow, red and brown on trees despite it still being the middle of summer.

Normally the onset of autumn is controlled by temperature and day length, but many trees at the RHS's gardens in Wisley, Surrey, are already starting to orange colour.

Trees such as maples, hazels, liquidambar and laburnum are among those that have started to show hints of autumn colours.

The RHS said the changing leaf colour is a response to the dry soil left over from the spring.

Brown foliage on chestnut trees has also been reported in many parts of the country.

2. METHODOLOGY

2.1 Methodology summary

The research universe for both surveys was classed as those aged 16 or over who live outside the county and are either as a Staying or Day Visitor. The purpose of the trip was defined as *not* to go shopping or attend a routine appointment or for study. For Day Visitors the respondent must have spent three or more hours away from home, including travel.

No quotas were applied in order to allow the profile of visitors to fall out naturally. The data, at analysis stage, was unweighted.

A fifteen minute questionnaire was administered face-to-face across 36 locations in Pembrokeshire and 22 locations across Cornwall incorporating a mix of urban and rural sites, attractions and places of interest.

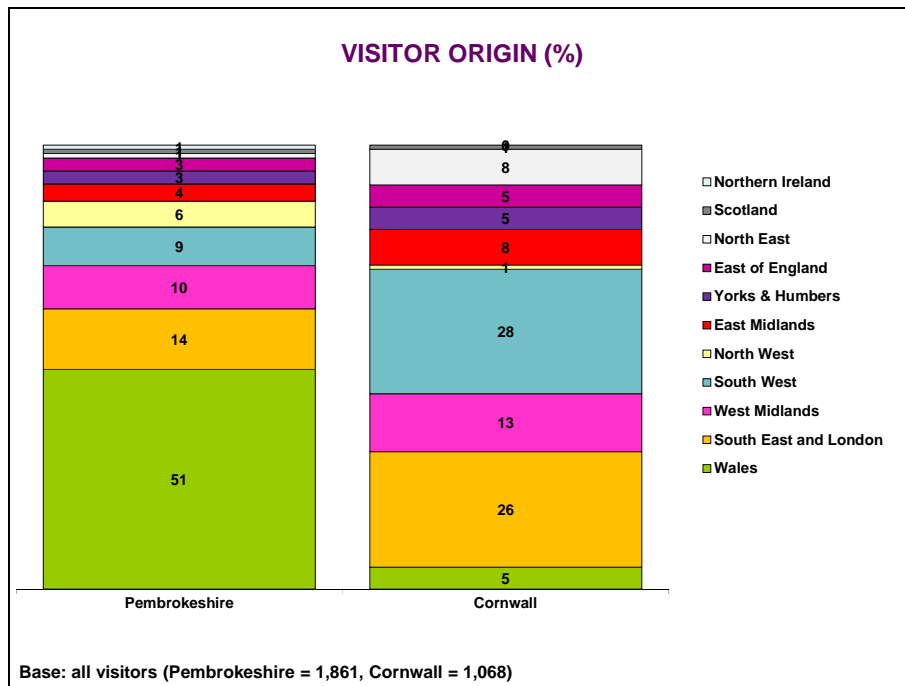
A total of 1,861 interviews were achieved across Pembrokeshire and 1,068 interviews were achieved across Cornwall.

3. MAIN FINDINGS

Overseas visitors to both destinations are in similar proportions, accounting for 5% of visitors to Pembrokeshire and 6% of visitors to Cornwall.

The chart, below, shows the proportions of visitors from regions of the UK to both destinations. It shows quite clearly the importance of **geographical proximity in holiday choice**: half (51%) of visitors to Pembrokeshire were from within Wales while over a quarter (28%) of visitors to Cornwall were from the South West of England.

Chart 1: Origin of visitors to Pembrokeshire and Cornwall



The postcodes of the visitors from the UK can be mapped (below). A line can be drawn from Blackpool in the North West to Norfolk in the East with the majority of visitors to both destinations falling to the west of that line: the North of England and Scotland do not contribute greatly to visitor numbers at either destination.

**Map 1: Distribution of UK visitors
...to Cornwall**

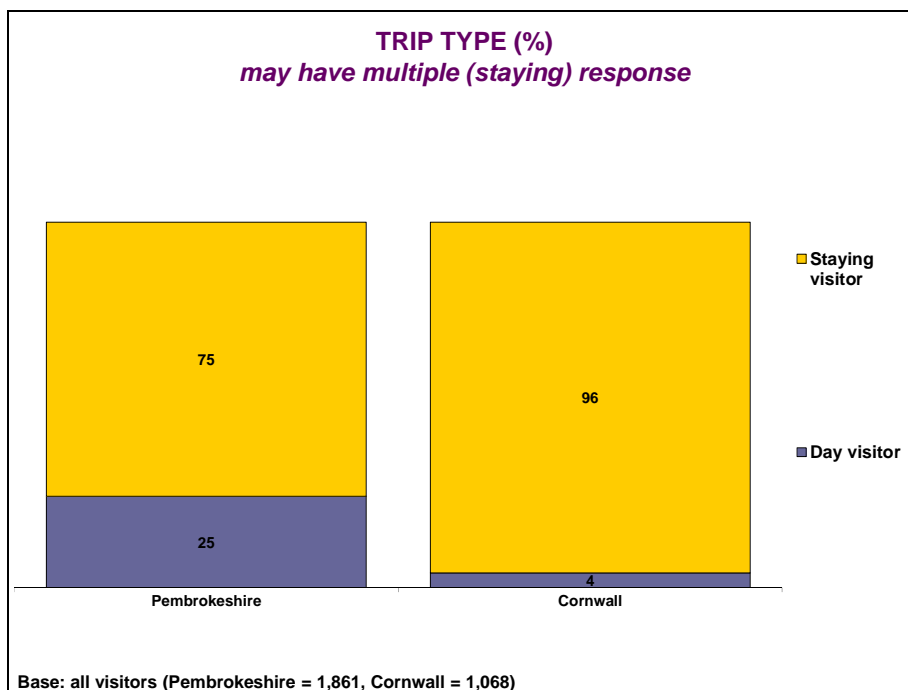


...to Pembrokeshire



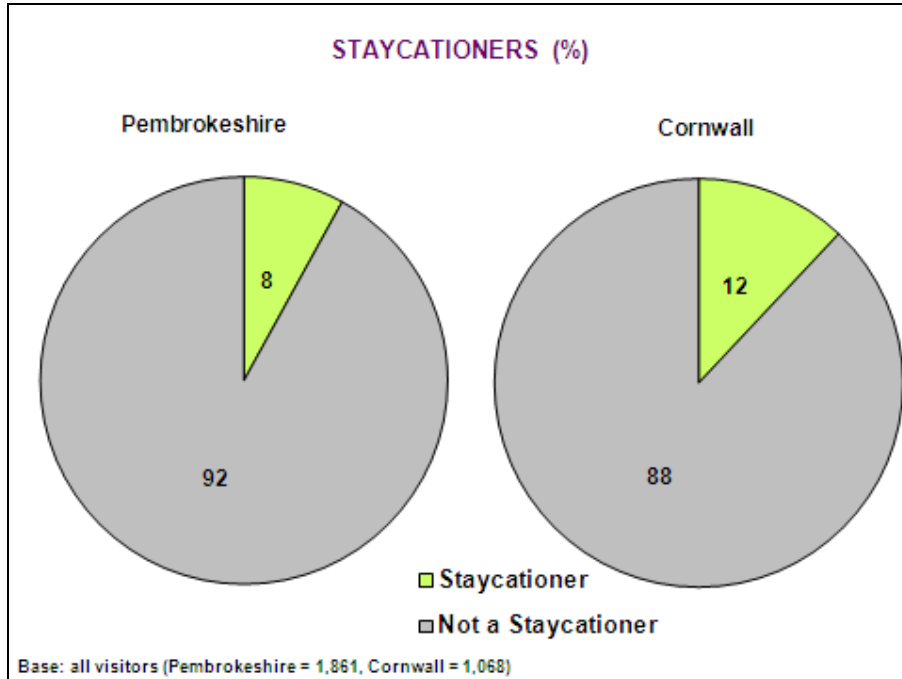
Geography also plays an important role in determining trip type, with Pembrokeshire attracting a considerably higher proportion of Day Visitors (98% of which were from within Wales) compared to Cornwall (91% of Day Visitors were from neighbouring Devon).

Chart 2: Type of trip



Amongst Staying Visitors from the UK around one in ten were *Staycationers*: that is they had substituted a trip that was usually taken abroad for a trip in the UK. This figure was slightly higher in Cornwall (12% fell into the Staycationer category) compared to Pembrokeshire (8%). The research found that, in both destinations, those on a Staycation were more likely to be first-time visitors to the region.

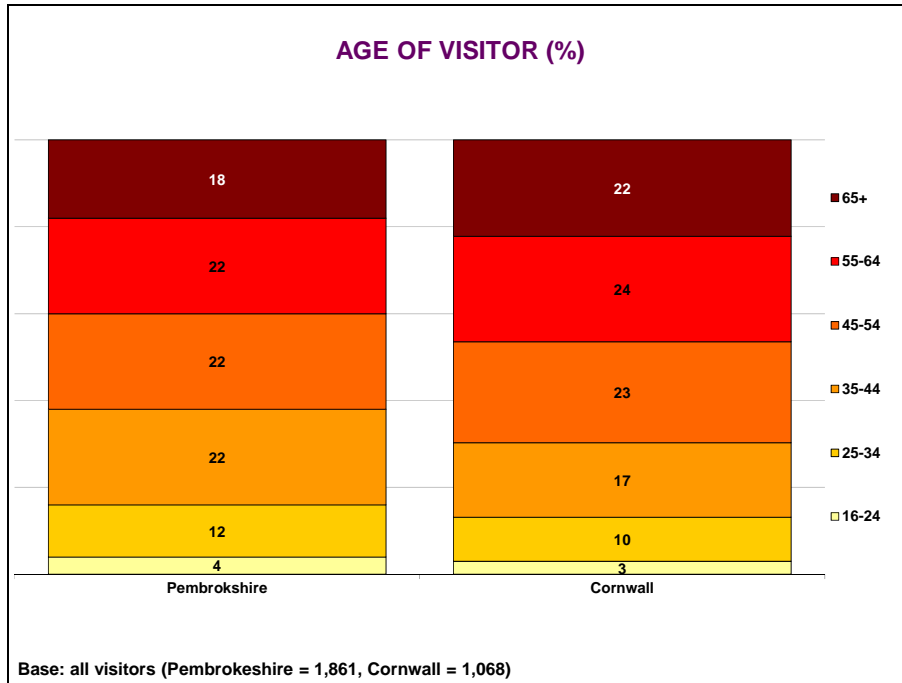
Chart 3: Proportions of UK Staying Visitors who have substituted a trip abroad for a trip in the UK



Repeat visitors are key for both destinations, with just 15% of visitors to Pembrokeshire on a first visit to the region and 9% of visitors to Cornwall on a first visit.

The profile of visitor ages is given in the following chart, showing that both destinations appeal to a wide age range.

Chart 4: age of visitor



Pembrokeshire has a slightly younger profile of visitor with 38% aged under 44 compared to Cornwall where 30% of visitors were aged under 44.

The lifestage of visitors to the two regions is captured using a segmentation with the categories as follows:

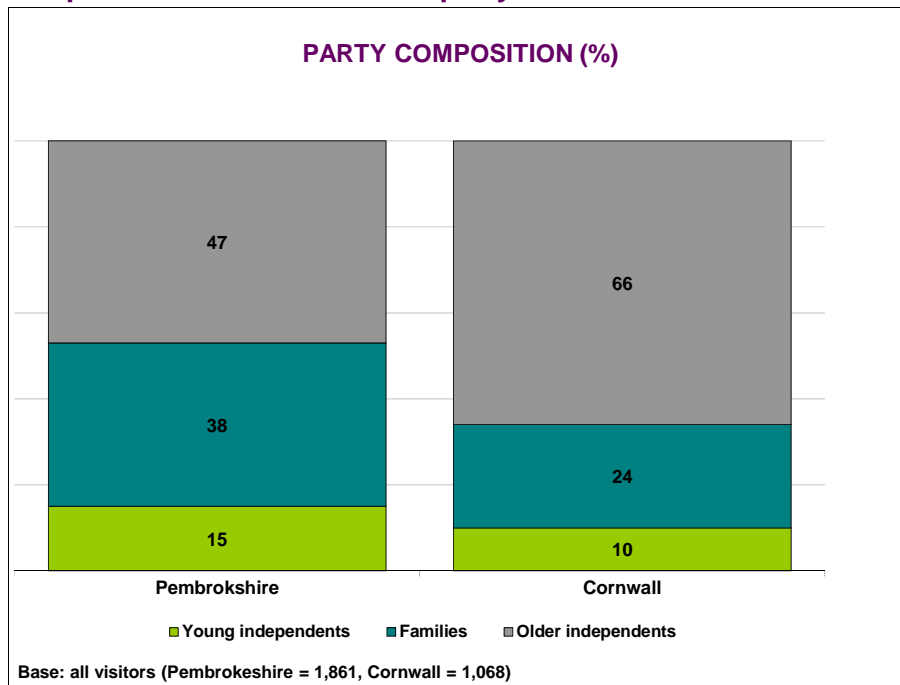
Young Independent: aged up to 34 years, no children in household

Older Independent: aged 35 years or more, no children in household

Families: children in household

The chart below shows that the lifestage profiles for both destinations differ considerably, with Cornwall attracting a far greater proportion of Older Independents (they account for two thirds – 66% – of visitors) compared to Pembrokeshire (47%).

Chart 5: composition of the immediate party

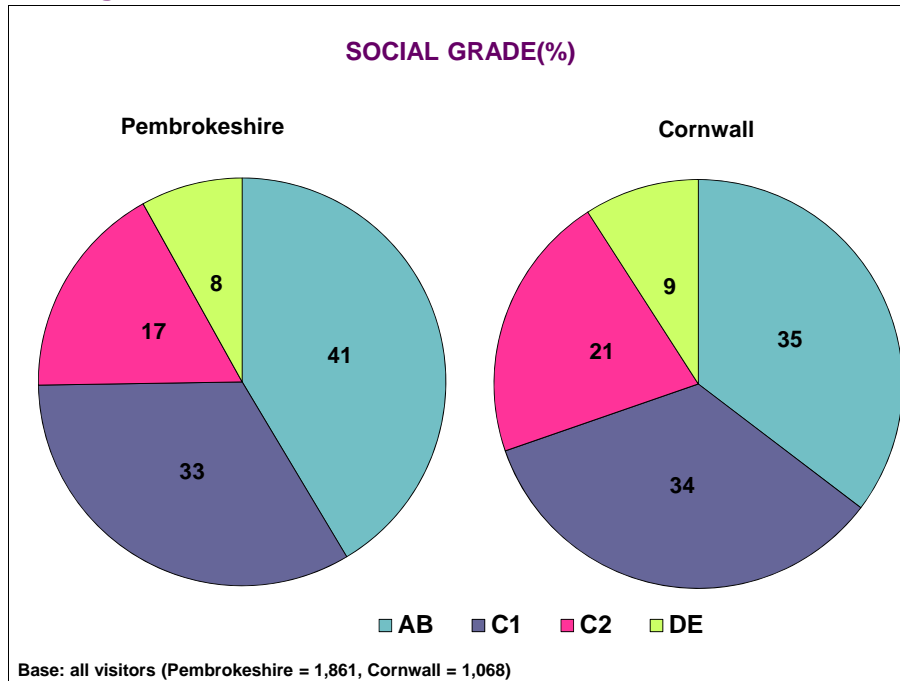


The social grade of visitors is shown below. Social grade is a classification based on occupation, used for over 50 years and is a market research industry standard for classification. The classifications are as follows:

- A Higher managerial, administrative and professional
- B Intermediate managerial, administrative and professional
- C1 Supervisory, clerical and junior managerial, administrative and professional
- C2 Skilled manual workers
- D Semi-skilled and unskilled manual workers
- E State pensioners, casual and lowest grade workers, unemployed and state benefits only.

Across the UK just over half 55% of residents fall into the social grades ABC1¹ and the chart below shows that both destinations over-represent these social grades with between two thirds (Cornwall) and three quarters (Pembrokeshire) falling into the ABC1 grades.

Chart 6: social grade of visitor



Around one in five visitors to both regions were on a trip with someone in their immediate party who had a disability (see table, below). Cornwall (with its slightly older age profile and larger proportion of Older Independents) attracted a slightly higher proportion of visitors with disabilities compared to Pembrokeshire.

Table 1: Disabilities within immediate party

	Pembrokeshire	Cornwall
No disabilities in group	82%	78%
Mobility	6%	8%
Sight	1%	1%
Hearing	4%	7%
Learning	1%	1%
Long-term illness	7%	10%
Other	1%	1%
Sample size	1,861	1,068

Base: all visitors

¹ Source: National Readership Survey 2010

Both surveys captured the motivations for visiting. For Cornwall (with the greater proportion of repeat visitors – 91%) the reason *because we've enjoyed previous visits* was notably the most-mentioned main reason (by 37% of visitors) compared to Pembrokeshire (20%).

Table 2: Main reason for visiting

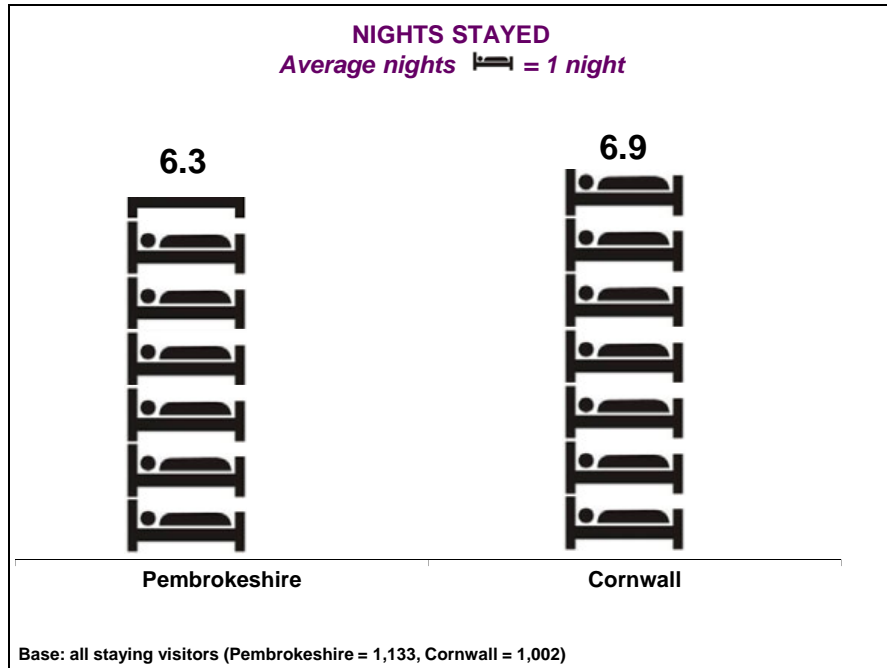
	Pembrokeshire	Cornwall
Because we've enjoyed previous visits	20%	37%
The beauty of the natural landscape	10%	11%
Because it's peaceful/ relaxing/ quiet	6%	8%
High quality beaches/ bathing	3%	3%
To visit family and friends (and/or their property)	12%	15%
To visit a specific location or attraction	12%	5%
Because it's easy to get to	2%	1%
South West Coast Path/ Pembrokeshire Coast National Park	5%	2%
To undertake a specific hobby/ pastime/ activity	5%	3%
Word of mouth/ recommendation	2%	2%
To visit own property (house, caravan etc)	5%	3%
Because of an advert or special offer	2%	1%
Sample size	1,861	1,068

Base: all visitors

In Pembrokeshire the presence of *Specific location or attraction* was mentioned by a greater proportion (12%) than those in Cornwall (5%).

Looking solely at Staying Visitors the average number of nights stayed was between 6.3 nights (Pembrokeshire) and 6.9 nights (Cornwall).

Chart 7: Average number of nights stayed



In both regions the length of stay was longest over the summer period compared to out of season, and looking at lifestage those falling into the category Older Independents stayed the longest number of nights in both destinations.

Table 3: Average number of nights stayed, by visitor lifestage

	Young Independents	Families	Older Independents
Pembrokeshire	5.2	6.3	6.8
Cornwall	5.7	6.8	7.1

Base: all Staying Visitors (Pembrokeshire = 1,188, Cornwall = 1,002)

Lastly, there were verbatim comments – comments offered spontaneously by visitors – that drew on differences between the two regions. There were no visitors in Cornwall that spontaneously mentioned Pembrokeshire, but there were three spontaneous comments by visitors to Pembrokeshire mentioning Cornwall:

“In Cornwall all cafes and restaurants display where locally sourced produce comes from and are proud to support local producers - could do a similar system [in Pembrokeshire]?”

“Don't put charging into the car parks or it'll turn into Cornwall where you can't park anywhere for free any more. It is cynical and puts people off.”

“The tranquillity, less crowded than say Cornwall. Beautiful scenery, wonderful beaches, the weather helped!”