

CEREDIGION VISITOR SURVEY 2011

TOTAL SAMPLE

November 2011



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



Llywodraeth Cynulliad Cymru
Welsh Assembly Government

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Questionnaire

1. EXECUTIVE SUMMARY

A total of 1,054 **face to face interviews** were conducted across seven sites in Ceredigion between April and September 2011. The research was designed to replicate that conducted in 2009 and 2010 to provide trend data. Data was weighted to reflect the universe of Day and Staying visitors within the region.

PROFILE OF VISITORS

- In 2011 nearly one third of the sample was composed of Day Visitors and two thirds of Staying Visitors. Amongst Staying Visitors from the UK, 7% were on a “Staycation” that is they had substituted a holiday abroad for one in the UK.
- Just over a quarter of UK and overseas visitors are on a first visit to the area: highest in Cardigan.
- Nearly one in five are on a trip with someone in their immediate party who has a disability. This is highest in Cardigan (nearly 30% are on a trip with someone with a disability).

TRIP PROFILE

- Two in five were on a *short break*: a figure on a par with previous years. *Main holidays* are in the greatest proportions in Devil's Bridge and Aberystwyth.

RATING CEREDIGION

- Ceredigion was rated very positively with 55% rating it as an *excellent* place to visit and a further 40% rating it *very good*. Visitors to Nant-yr-Arian were most likely to give the highest ratings.
- Likelihood to recommend and likelihood to revisit remain high for the region.

SOURCES OF INFORMATION

- The majority of visitors used informal information sources prior to and during the trip (such as knowledge from a previous visit and word of mouth). Looking specifically at new visitors to the area one in ten used a tourism brochure specific to the area.
- Four in ten visitors to the region are web-enabled, that is they have access to the internet via a mobile or hand-held device. This is considerably higher amongst certain lifestage groups: 75% of Young Independents and 64% of Families had access to the internet during their trip.

2. INTRODUCTION AND OBJECTIVES

2.1 Background

In late 2010 Visit Wales Commissioned Beaufort Research to conduct a research study amongst overseas and UK Visitors to Wales both Staying and Day, between April to October 2011. This replicated and updated similar surveys, conducted regularly for over a decade.

The overall aim of the study was:

To improve and build upon Visit Wales' understanding of the motivations, needs and behaviours of visitors to Wales.

The survey explored the following:

- Visitor profile (age, gender, lifestage, social group)
- Trip profile (nights stayed, trip type, party composition)
- Motivation to visit
- Transport and travel
- Accommodation
- Satisfaction overall and with specific elements of the visit
- Likelihood to recommend

While the project was commissioned by Visit Wales and took a Wales-wide view of visitors, several local authorities and two public bodies also took advantage of the research and bought into it by boosting the volume of interviews at particular locations, and adding area-specific questions to the survey in order to measure specific local elements of the visitor's experience.

Those buying into the 2011 UK Visitor Survey were:

- **Ceredigion County Council**
- Neath Port Talbot County Borough Council
- Conwy County Council
- Powys County Council
- CyMAL
- Arts Council of Wales
- Mid Wales Tourism Partnership
- Southern Wales Tourism

This topline report summarises the findings from the main stage of the Visitor Survey research and concerns interviews conducted in Ceredigion.

3. METHODOLOGY

Consistent with the 2009 and 2010 survey, visitors were interviewed during their trip to Wales. A total of 1,054 face to face interviews were conducted in either Welsh or English according to the respondent's request, across seven locations in Ceredigion. The interviews at site level were as follows:

Interview Location	No. of Interviews
Aberystwyth Promenade	142
Aberaeron	156
New Quay	161
Devil's Bridge	131
Nant-yr-Arian	175
Llanerchaeron	133
Cardigan Town Centre	156
Total	1,054

The data was weighted in order to reflect the universe of Day and Staying visitors to the region.

This is the main report for the 2011 visitor survey. Separate key findings reports exist for the seven locations individually.

4. MAIN FINDINGS

4.1 Profile of Visitors

Interviews were conducted with a randomly selected sample of visitors with the profile left to fall out naturally.

In terms of the split between Day and Staying visitors, the results are shown in the table below for this year compared to previous years. In 2009, and replicated in 2010, the survey split out Day and Staying Visitors according to a Wales-wide division. In 2011, in line with what was carried out for other local authorities, the split focuses on the profile of visitors specifically *within the Ceredigion region*. For this reason there is a greater proportion of Day Visitors in the final data which may have some impact on the findings.

Table 1: Day vs Staying Visitors in Ceredigion(%)

	2009	2010	2011
Base	631	1,150	1,054
Part of holiday - staying away from home	69%	75%	31%
Part of holiday - visiting friends/relatives- staying away from home	10%	4%	3%
Day visit from home (day trip, outing, non routing shopping)	21%	21%	66%

Base: all visitors

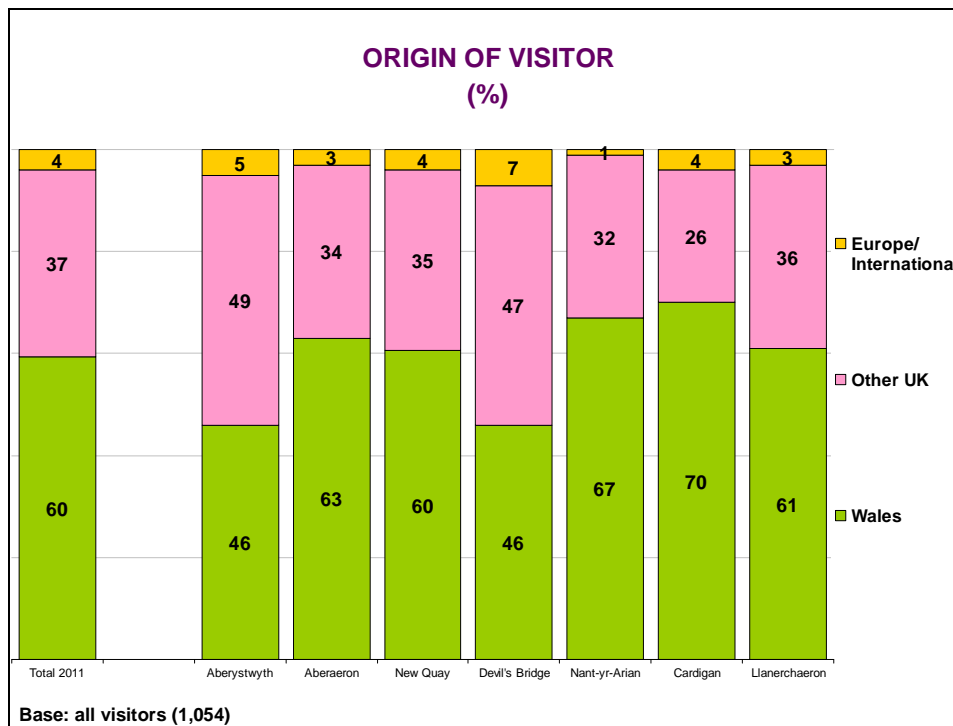
The proportions in 2011 reflect the volumes of UK Day, UK Staying and overseas visitors provided by Visit Wales for each local authority area.

Amongst Staying Visitors from the UK, 7% were on a “Staycation” – a term coined during the recession and current economic downturn. It refers to a holiday taken within the UK that replaces a holiday that would normally be taken abroad.

Staycationers were in their highest proportions in New Quay (10% of Staying Visitors were on a holiday that would normally be taken abroad) and Cardigan (13%).

In terms of visitor origin, Figure 1, below, shows that six in ten (60%) of visitors to Ceredigion are from Wales: highest in Cardigan (where they account for 70% of all visitors) and at their lowest in Devil’s Bridge and Aberystwyth (where they account for 46% at both sites). Overseas visitors account for 4% of all visitors to the region: highest in Devil’s Bridge (7%).

Figure 1 – Place of residence



Looking at the proportions of new versus repeat visitors, just amongst visitors from the UK and overseas, 27% were visiting Ceredigion for the first time (down from 37% in 2010 although there was a greater proportion of Staying Visitors in the previous year’s data who are more likely to be new to the region). Looking at visitor experience by location the following table breaks down the data:

Table 2: UK and overseas visitor experience of this part of Wales

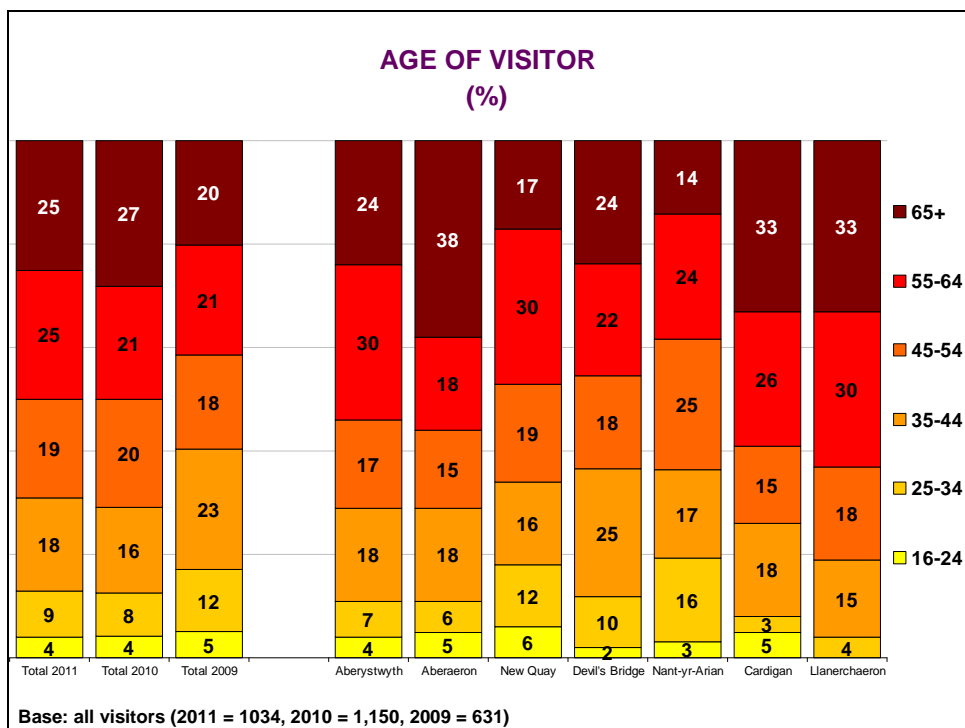
	TOTAL	Aberystwyth	Aberaeron	New Quay	Devil's Bridge	Nant-yr-Arian	Cardigan	Llanerchaeron
First visit	27%	27%	14%	31%	32%	20%	41%	33%
Repeat visit	62%	72%	68%	69%	48%	71%	56%	41%
Not answered	11%	2%	18%	0%	19%	9%	3%	26%

Base: all visitors from UK and Overseas (544)

Cardigan attracts the greatest proportion of new visitors to the area: 41% are on a first trip compared to Aberaeron where just 14% are on a first trip.

The age profile of visitors to the different sites varies somewhat and is shown in Figure 2, below.

Figure 2



Looking at Ceredigion as a whole it is interesting to note that, in 2011 as in the previous years, all age groups are well represented in the region: this year a quarter are aged 65+, a quarter aged 55-64 and just under a fifth in the 45-54 and 35-44 age groups. This demonstrates the broadness of its appeal, although there are some differences between the locations. The age profile at New Quay and Nant yr Arian is somewhat younger while in Aberaeron 38% of visitors are in the 65+ age group.

In terms of socio-economic grade, 63% of Ceredigion visitors were from the ABC1 grouping (on a par with previous years – 65% in 2010 and 67% in 2009). This is higher than the UK average (51% are in the ABC1 socio-economic grade).

Visit Wales applies a lifestyle segmentation which has been added to the analysis, based on the following criteria:

Young independents – aged under 35, no children in household

Older independents – aged 35-54, no children in household

Families – children in household

Empty nesters – aged 55+, no children in household

The largest group of visitors to Ceredigion are *Empty Nesters* accounting for 49% of the visitors overall (48% in 2010). They are most prevalent in Llanerchaeron (60%) and least in Nant yr Arian (38%). The next largest group were *Families* which account for 23% (on a par with the previous year of 22%). The proportion of families is highest in New Quay (30%) and lowest in Aberaeron (13%). This is closely followed by *Older Independents* (20% - the same as 2010) who are found in the greatest proportions in Nant yr Arian (where they account for 26% of the visitors). The smallest group are *Young Independents* who account for 8% of the sample overall. They are in the greatest proportion in Nant yr Arian (11%) and least in Llanerchaeron (4%).

Table 3, following, shows the breakdown of Staying Visitors to each site by their holiday type. The most mentioned type of holiday/ break was a *short break* (mentioned by 41% of visitors to the area – much the same as in 2010 when it was 42%) followed by *main holiday of the year* (33% in 2010 – and 31% in 2009).

Table 3: type of holiday/ break

	2011	2010	Aberystwyth	Aberaeron	New Quay	Devil's Bridge	Nant-yr-Arian	Cardigan	Llanerchaeron
Main holiday of the year	33%	31%	37%	32%	33%	38%	31%	30%	36%
Secondary/ additional holiday	23%	24%	15%	21%	29%	17%	22%	27%	23%
Short break	41%	42%	41%	44%	37%	43%	43%	40%	37%
Other	2%	2%	4%	3%	1%	1%	5%	2%	4%

Base: all staying visitors (811)

Looking at the data by location:

- *Main holidays* are in greater proportions at Devil's Bridge (38%) and Aberystwyth (37%).
- *Secondary/ additional holidays* are highest in New Quay (29%) and lowest in Aberystwyth (15%).
- *Short breaks* are in their greatest proportions in Aberaeron (44%).

Looking at the range of all reasons for visiting Wales amongst visitors to Ceredigion, the most-mentioned category was *to enjoy the scenery, landscape, countryside* mentioned by two thirds (66%) of visitors. This was followed by *to visit places/ historical sites/ specific attractions* (mentioned by 25% of visitors) followed by *to take part in outdoor activities* (20%).

In 2011, for the first time, the survey looked into disabilities amongst those visiting the region. A disability was defined as having any of the following impairments:

- | | |
|----------|-------------------|
| Mobility | Learning |
| Sight | Long-term illness |
| Hearing | Other |

Table 4: Disabilities within the immediate party

	Wales	Ceredigion total	Aberystwyth	Aberaeron	New Quay	Devil's Bridge	Nant-yr-Arian	Cardigan	Llanerchaeron
Disability	17%	16%	15%	13%	15%	11%	18%	26%	12%
No disability	82%	83%	80%	87%	85%	89%	82%	72%	87%
Refused/ not answered	1%	1%	5%	0%	0%	0%	0%	2%	1%

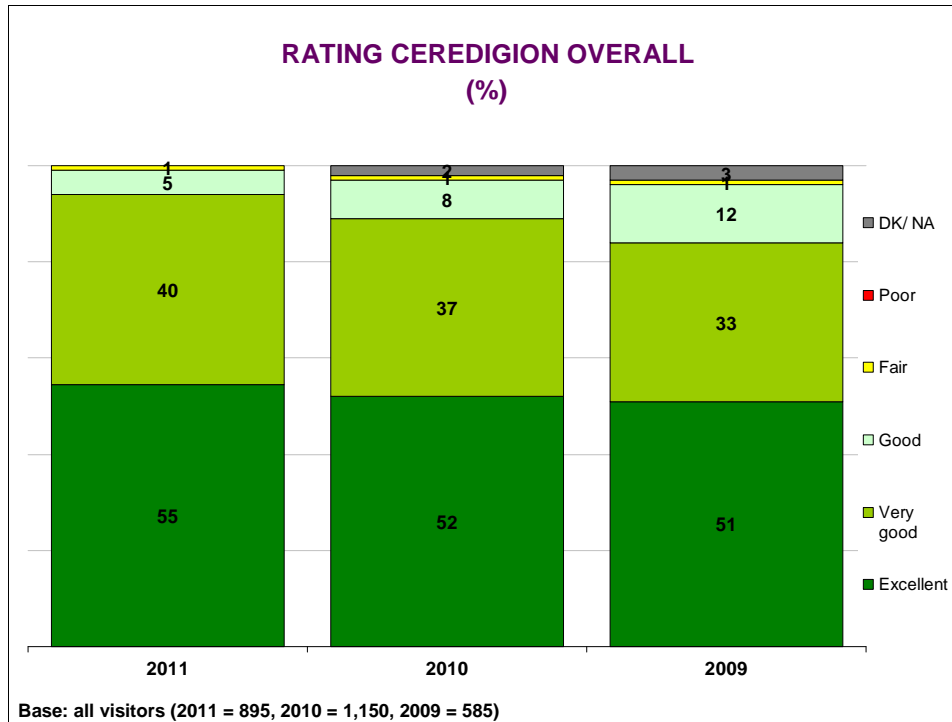
Base: all visitors (1,054)

While Ceredigion has a similar proportion on a trip with someone in the party with a disability (16% compared to the Wales total of 17%) the results differed quite considerably by location: just over a quarter (26%) of those visiting Cardigan had someone in their party with a disability, compared to 11% at Devil's Bridge.

4.2 Rating Ceredigion as a place to visit

In 2011 over half (55%) rated Ceredigion as an *excellent* place to visit, with a further 40% rating it *very good* and 5% rating it *good*. These figures are on a par with previous years – and just slightly more positive.

Figure 3

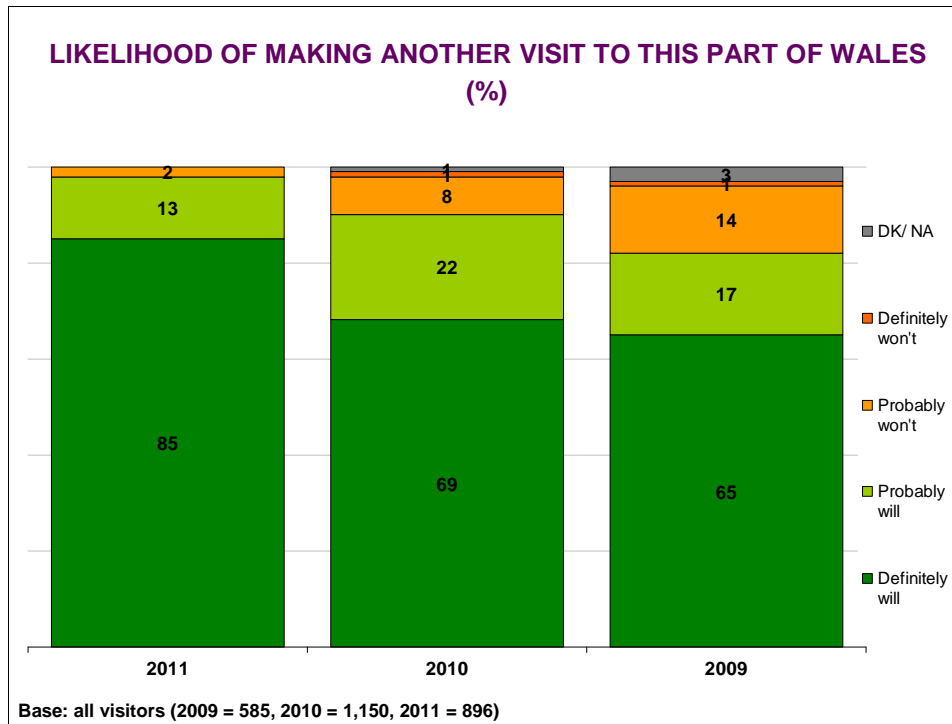


Looking at overall ratings by location of interviewing, visitors to Nant yr Arian were most likely to rate the area *excellent* with over two thirds (68%) doing so. Aberystwyth had the lowest ratings (although it should be pointed out it still performed positively) with 27% rating the area *excellent*.

Day Visitors were more likely to rate the area as *excellent* (50% did so) compared to Staying Visitors (39%). Interestingly, looking at visitors from the UK and overseas (i.e. excluding those from Wales) 40% of those on a repeat visit rated the area as *excellent* compared to 19% of those on a first time visit.

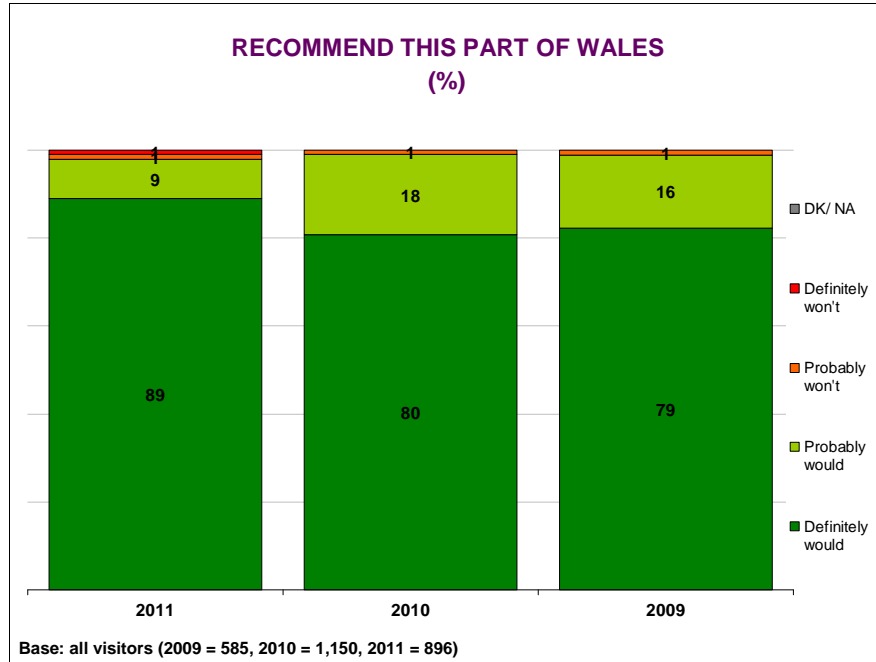
Likelihood to revisit is high (see following chart) with a total of 85% of visitors saying they *definitely will revisit* and 13% saying they *probably will*. This is considerably more positive than previous waves and this is likely to be the result of a greater proportion of Day Visitors in the sample for whom a repeat visit is more convenient.

Figure 4



Likelihood to recommend Ceredigion is also high with 89% saying they *definitely would* and a further 9% saying they *probably would*. Just 2% said they would not.

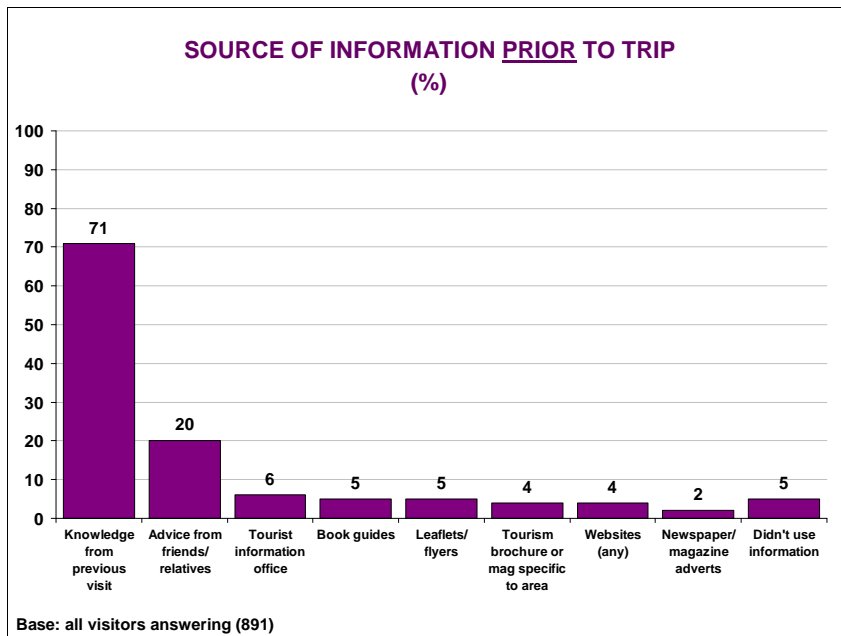
Figure 5



4.3 Sources of information

As part of the boost-specific questions in Ceredigion, visitors were asked what were their sources of information prior to their visit to the region. The results are shown in the following chart.

Figure 6



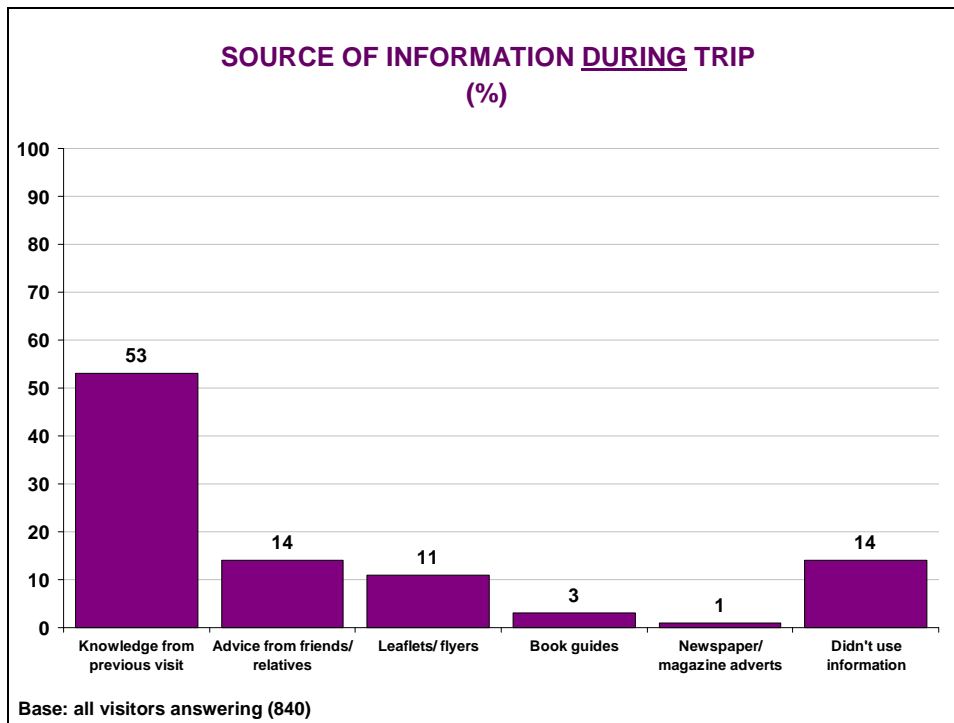
With only 7% of visitors from the UK on a first-time visit to Wales and 6% of visitors from Wales on a first time visit the chart above is perhaps not surprising. It shows or the majority of visitors to the region no 'formal' information was used prior to the trip, with *previous visits* and *word of mouth* informing the vast majority of visitors and for 5% no information was required. When other sources were mentioned the greatest were *tourist information office* (6%), *book guides* (5%) and *leaflets/flyers* (5%).

For those from the UK/ overseas who are on a *first-time visit* to Wales the sources of information were:

- Advice from friends and relatives (14%)
- Book guides (13%)
- Tourist information (12%)
- Tourism brochure or magazine for this specific area (10%)

During the visit the sources of information were as follows:

Figure 7



While previous knowledge and word of mouth still play important roles the mention of *flyers* has more than doubled to 11%. Looking at those who are on a *first trip to Wales* just under a quarter (23%) made use of *flyers* with a similar proportion (22%) using a *tourist information office* to obtain information during the trip.

For the first time in 2011 visitors were asked if they access to the internet during their trip – either personally or via another person in their immediate party. In total just over four in ten visitors did have access, and of all the visitors to the region just under two in ten accessed the internet to find out things during their trip – both slightly below the Wales average.

Table 5: Access to the internet during trip via mobile/ handheld device

	Wales	Ceredig ion total	Aber- ystwyth	Aberaeron	New Quay	Devil's Bridge	Nant-yr- Arian	Cardigan	Llaner- chaeron
Access to internet during trip	53%	41%	34%	37%	50%	29%	53%	49%	27%
Access and used internet to find out things	25%	17%	21%	19%	16%	10%	16%	22%	11%

Base: all visitors (1,054)

Certain groups of visitors to Ceredigion are likely to have access to the internet via a mobile or handheld device during their trip. Looking at the data by lifestage the results are given below for the **% who have access**:

Young independents	75%
Older independents	45%
Families	64%
Empty Nesters	25%

Thus the results show quite considerable differences between lifestages.

4.4 Elements of the trip

Looking firstly at travel, of the 81 visitors to Ceredigion who were from overseas, 55% had arrived to the UK via plane, 30% via a car ferry and 2% via the train (including the Channel Tunnel).

Moving on to look at transport used to get around Wales for the duration of the trip, the majority (83%) were reliant on a private car/ van (the same as in 2010). This slightly less amongst the younger age group: 74% relied on private transport amongst the 16-24 year olds.

Looking specifically at public transport, just 4% used the train during their trip around Wales: rising to 17% amongst those aged 16-34. Public buses/ coaches were used by 1%.

Those who used public transport were asked to rate it and the results are below. The mean score for satisfaction in 2011 stands at 8.41 out of a possible score of 10, where 1 = very dissatisfied and 10 = very satisfied.

Figure 8



Turning to the subject of accommodation, a total of 811 visitors were staying in Wales as part of their trip. The types of accommodation used are shown in the table following, split out by the location of stay.

Table 6: Type of accommodation (top mentions)

	2011	Aberystwyth	Aberaeron	New Quay	Devil's Bridge	Nant-yr-Arian	Cardigan	Llanerchaeron
Self-catering cottage/ house	18%	9%	21%	21%	13%	20%	18%	26%
Owned static caravan	14%	10%	16%	15%	5%	13%	24%	12%
Campsite	9%	7%	8%	12%	13%	8%	8%	4%
Home of relation	9%	6%	8%	4%	9%	7%	3%	7%
Bed and breakfast	7%	8%	6%	6%	11%	8%	5%	9%
Towed caravan	6%	6%	8%	4%	1%	3%	15%	6%
Home of friend	6%	6%	8%	4%	9%	7%	3%	7%
Mid to large hotel	5%	8%	3%	3%	12%	3%	5%	5%
Small hotel	5%	9%	3%	4%	10%	3%	2%	6%

Base: all staying visitors (811)

As in 2010 the category of accommodation *self-catering cottage/ house* is the most-mentioned (18% in 2011 - slightly lower than 21% in 2010). This type of accommodation accounts for over a quarter (26%) of Staying Visitors in Llanerchaeron but only 9% in Aberystwyth.

The second most-mentioned category was *owned static caravan*, accounting for 14% of the mentions: highest in Cardigan (24%).

Amongst those who were in a static caravan over half (53%) owned the caravan themselves, 20% were in a caravan that was owned by family or friends and 12% were in a caravan that was rented from a site owner.

The most-mentioned method of booking accommodation was *direct with the establishment* – mentioned by nearly two thirds (60%) of visitors. This was followed by *other websites/ internet/ email* (17%). Just 2% booked via a Tourist Information Centre.

In terms of the location of the stay, the most mentioned location was *New Quay* with 16% staying in/ near there. Only a quarter (26%) of those in paid accommodation were staying outside the local authority area.

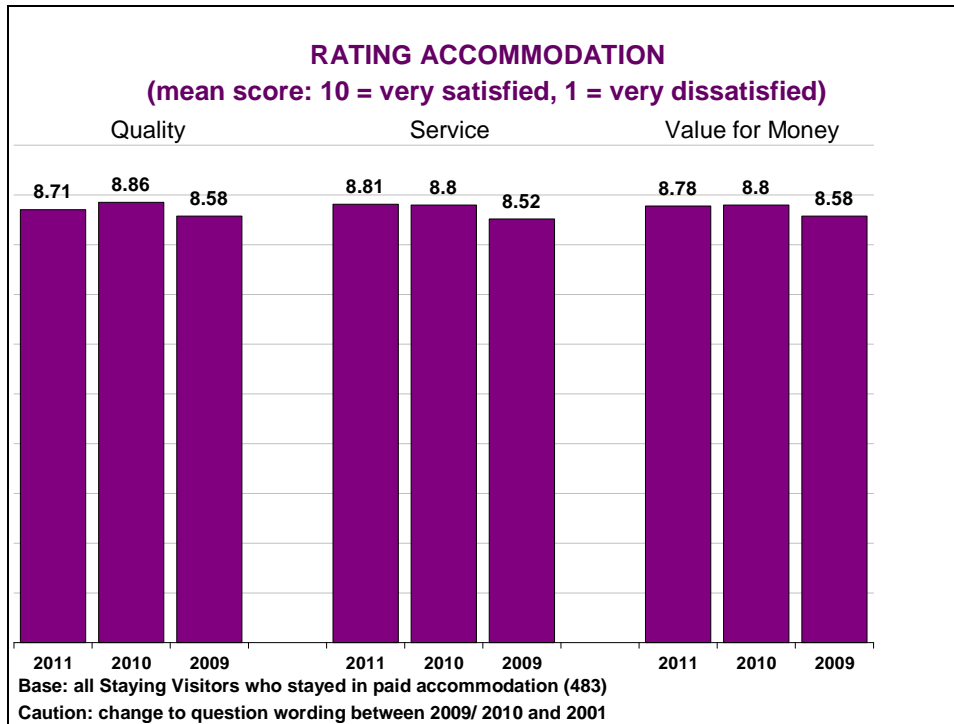
Table 7: location of/ nearest to stay

New Quay	16%
Aberystwyth	13%
Aberaeron	13%
Cardigan	5%
Other Ceredigion	27%
Outside Ceredigion	26%

Base: all respondents staying overnight in paid accommodation (483)

Those staying in paid accommodation were asked to rate it in terms of quality, service and value for money: the results of which are shown in Figure 10.

Figure 9



The overall picture is very positive, with mean scores in the high 8/10 rating, where 1 = very dissatisfied and 10 = very satisfied. This is across all aspects: quality, service and value for money.

APPENDIX - QUESTIONNAIRE

Please note: the questionnaire was also provided in Welsh