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1. Headline Findings

Very high satisfaction in Ceredigion

1.1 Visitors interviewed in Ceredigion rate their trip very highly. Overall trip satisfaction is rated 9.5 out of 10. ‘Quality of the natural environment’ and ‘friendliness of people’ both score an average of 9.7 out of 10. All ratings of visitors’ trips are similar to or higher than the all of Wales averages.

Strong likelihood of returning

1.2 Following on from very high satisfaction ratings, the vast majority of visitors to Ceredigion say they are likely to return. Around nine in ten (91%) UK staying visitors say they ‘definitely will’ return, as do 88% of day visitors.

Dylan Thomas is widely known

1.3 The vast majority (96%) of Welsh visitors and most (84%) UK visitors from outside Wales have heard of Dylan Thomas. The most commonly associated place with the Welsh poet is Laugharne / the Boathouse (48% of those aware). About a third (32%) of those aware of the poet associate him with New Quay.

Wide range of accommodation choices with high satisfaction

1.4 Around a quarter (24%) of staying visitors opt to stay in a self catering house or cottage, and a further 16% stay in an owned static caravan. A significant proportion (22%) of overseas visitors stay with family. Those who stay in paid commercial accommodation rate their overall satisfaction 9.2 out of 10.

1.5 Half (50%) of all staying visitors book their accommodation directly with the provider, and a further 16% book through a tourism website.

The beach and outdoor activities are strong draws for visitors

1.6 Around two thirds (67%) of visitors say that their visit is partly ‘to enjoy the landscape / countryside / beach’. About half (49%) specify the beach as an activity undertaken during their trip.

1.7 A third (33%) of visitors say they plan on taking part in outdoor activities, including 43% of UK staying visitors.

1.8 The very fine weather experienced in the summer of 2013 meant that UK residents did not necessarily need to go abroad to enjoy a beach experience or outdoor activities.
High satisfaction with attractions

1.9 Respondents who have visited an attraction during their trip rate them highly. The overall enjoyment of attractions scores 9.3 out of 10. Satisfaction ratings given to attractions are very similar to the all of Wales results.

Ceredigion attracts older couples and families with young children

1.10 A high proportion (43%) of visitors to Ceredigion are couples. Around a quarter (24%) of visitors comprise families with young children.

1.11 However, it seems like the area is less appealing to families with older children (11%). Only 9% of UK staying visitors are aged under 35 (compared to the 33% of the UK adult population that this group represents), which suggests that Ceredigion is less appealing to young people and is something that could be considered.
2. Background and Methodology

What is the Ceredigion visitor survey?

2.1 In 2013 Visit Wales commissioned Strategic Marketing to conduct a survey of visitors at 55 sampling locations across the whole of Wales. Local marketing areas had the opportunity to boost the sample of interviews conducted in their own area, choose their own questions and commission their own report. The Ceredigion marketing area opted to do this.

2.2 Objectives of the survey were to understand in more detail:

- Profile of visitors to Ceredigion
- Satisfaction with visit
- Motivation for visiting
- Accommodation used
- Awareness of Dylan Thomas and associated places

How was the survey conducted?

2.3 The survey was conducted using face-to-face interviews with visitors during their trip to Ceredigion.

2.4 Filter questions in the questionnaire ensured that respondents met the criteria for either a staying or day visitor to the area:

- Aged 16 or over
- Purpose of visiting not routine shopping, routine appointment, business or study
- Day visitors must have spent three or more hours away from home (including travel)
- Staying visitors must have spent at least two nights in Wales at the point of interview if their total length of intended stay was four or more nights; or at least one night in Wales if the total length of intended stay was fewer than four nights

2.5 All interviews were conducted by trained face-to-face interviews working to MRS and IQCS standards. Interviews were conducted between late March and October 2013 on a mixture of weekdays and weekends, inside and outside of school holidays.

2.6 A total of 379 interviews were conducted at selected sampling locations shown below:
### Sampling by visitor market

2.7 The main Visit Wales survey required set quotas on UK staying visitors, Day visitors and Overseas visitors for each interview shift undertaken.

2.8 In the sample of 379 interviews for Ceredigion, the number of interviews conducted with each market is as follows:

<table>
<thead>
<tr>
<th>Visitor market</th>
<th>No. of interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK Staying visitors</td>
<td>255</td>
</tr>
<tr>
<td>UK Day visitors</td>
<td>96</td>
</tr>
<tr>
<td>Overseas visitors</td>
<td>28</td>
</tr>
</tbody>
</table>

2.9 Differences between the three visitor markets are highlighted throughout this report.

### Questionnaire

2.10 In the booster interviews (i.e. commissioned extras not part of the Wales visitor survey), Ceredigion had the opportunity to add in new questions. The two new questions added are Q26 and Q27 relating to awareness of Dylan Thomas.

### What does this report cover?

2.11 In the interests of keeping this report reasonably concise and reader-friendly, we focus on the most significant findings and differences between respondent groups. A full set of cross-tabulations for each question broken down by visitor market, origin of UK visitors and new/lapsed/repeat visitors is provided separately.
2.12 Comparisons between results for Ceredigion and the whole of Wales are made throughout. Results for the whole of Wales are all taken from the main Wales Visitor Survey 2013.

2.13 A few questions in the questionnaire explored the subject of visitor information needs. Visit Wales commissioned additional qualitative research on this subject, which is covered in a stand-alone report submitted to Visit Wales.
3. Visitor Profile

Origin of visitors – UK staying market

<table>
<thead>
<tr>
<th>Origin of visitors</th>
<th>% of UK staying visitors to Ceredigion</th>
</tr>
</thead>
<tbody>
<tr>
<td>England – Midlands</td>
<td>31%</td>
</tr>
<tr>
<td>England – North</td>
<td>11%</td>
</tr>
<tr>
<td>England – South East</td>
<td>11%</td>
</tr>
<tr>
<td>England – South West</td>
<td>9%</td>
</tr>
<tr>
<td>UK outside Wales – not specified</td>
<td>9%</td>
</tr>
<tr>
<td>Wales – South East</td>
<td>12%</td>
</tr>
<tr>
<td>Wales – South West</td>
<td>9%</td>
</tr>
<tr>
<td>Wales – Mid</td>
<td>5%</td>
</tr>
<tr>
<td>Wales – North</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: 254

Good range of visitors from different parts of England

3.1 Around six in ten (62%) UK staying visitors to Ceredigion are from England. Ceredigion has attracted staying visitors from a good spread of English regions and not just from a short distance away. Visitors from South East and North England have travelled for a good number of hours to get to Ceredigion.

Not many residents from North Wales stay in Ceredigion

3.2 The majority of Welsh staying visitors in the sample are from South Wales. Many parts of North Wales are not far from Ceredigion, but North Wales only makes up 4% of Ceredigion’s UK staying profile.
Origin of visitors – UK Day market

<table>
<thead>
<tr>
<th>Origin of visitors</th>
<th>% of UK day visitors to Ceredigion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Country</strong></td>
<td></td>
</tr>
<tr>
<td>Wales</td>
<td></td>
</tr>
<tr>
<td>Ceredigion</td>
<td>36%</td>
</tr>
<tr>
<td>Powys</td>
<td>21%</td>
</tr>
<tr>
<td>Pembrokeshire</td>
<td>17%</td>
</tr>
<tr>
<td>Carmarthenshire</td>
<td>9%</td>
</tr>
<tr>
<td>Wrexham</td>
<td>1%</td>
</tr>
<tr>
<td>South Wales other</td>
<td>9%</td>
</tr>
<tr>
<td>England</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: 96

Day visitors tend not to travel far at all

3.3 A trend both in Ceredigion and in Wales as a whole is that day visitors mostly travel very short distances. If day visitors come from outside Ceredigion itself, they are likely to originate from a neighbouring local authority area.

North Wales residents not visiting?

3.4 As with staying visitors, North Wales residents appear to feature very thinly in the day visitor profile to Ceredigion. Welsh visitors are coming up from the south or the east, but hardly from the north.
Origin of visitors – Overseas market

<table>
<thead>
<tr>
<th>Origin of visitors</th>
<th>No. of overseas visitors to Ceredigion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>3</td>
</tr>
<tr>
<td>Republic of Ireland</td>
<td>3</td>
</tr>
<tr>
<td>Spain</td>
<td>2</td>
</tr>
<tr>
<td>Other Europe</td>
<td>4</td>
</tr>
<tr>
<td>Australia</td>
<td>5</td>
</tr>
<tr>
<td>USA</td>
<td>4</td>
</tr>
<tr>
<td>China</td>
<td>3</td>
</tr>
<tr>
<td>Canada</td>
<td>3</td>
</tr>
<tr>
<td>Outside Europe other</td>
<td>1</td>
</tr>
</tbody>
</table>

Base: 28

Small sample of overseas visitors

3.5 The overseas visitor sample is small (28) and so the above table shows numbers rather than percents. The overseas sample is not large enough to draw conclusions about.

3.6 Interviews were conducted in English, so this might have resulted in a respondent bias towards those confident enough to converse in the language, as was also the case in the all of Wales survey.
Age profile

### Q41 Age of Respondent

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-24</td>
<td>3%</td>
</tr>
<tr>
<td>25-34</td>
<td>9%</td>
</tr>
<tr>
<td>35-44</td>
<td>14%</td>
</tr>
<tr>
<td>45-54</td>
<td>23%</td>
</tr>
<tr>
<td>55-64</td>
<td>21%</td>
</tr>
<tr>
<td>65+</td>
<td>30%</td>
</tr>
</tbody>
</table>

**Appealing to over 35s but not under 35s**

3.7 The majority (88%) of visitors to Ceredigion are aged over 35, including 30% in the 65+ age band. Nearly half (46%) of day visitors are aged 65 or over.

3.8 Only 12% of visitors are aged under 35 – much lower than the proportion (33%) of the UK adult population that this group represents.
Party profile

Q39 "Which of the following best describes your party on this visit?"

- A couple: 43%
- Family - with young children: 20%
- Visiting alone: 14%
- Friends: 7%
- Family - with older children: 7%
- Family - without children: 5%
- Family - with young and older children: 4%
- Organised group/society: 1%
- Other: 1%

Base: 379

Appealing for couples

3.9 A high proportion (43%) of visitors to Ceredigion are couples, including 49% of UK staying visitors. It appears that the region’s offering is a good match for this market.

Appealing for families with young children but not older children

3.10 Around a quarter (24%) of visitor parties to Ceredigion are families containing young children (20% containing young children + 4% containing young and older children). However a much lower proportion (11%) of visitor parties are families containing older children. The exception is with overseas visitors, of which a quarter (25%) comprise families with older children.

3.11 The overall results might show that the area is less appealing to older children, as it is also less appealing to young adults under 35. However it may be that older children make up a lower proportion of domestic parties taking day trips and breaks as some of them may prefer to spend time with their friends instead.

3.12 The only other significant differences between the visitor markets in the party profile to Ceredigion is that 33% of day visitor parties are lone visitors, compared to an average of 7% for the other two visitor markets.
3.13 Secondly, groups of friends are more likely to visit Ceredigion as a day visitor (16%), compared to a lower proportion (4%) of UK staying visitors.

Socio-economic group

UK staying visitor profile skewed towards ABC1

3.14 Around two thirds (67%) of UK staying visitors to Ceredigion are in the ABC1 socio-economic group, which is the same as the all of Wales result (67%).

3.15 The skew towards ABC1s may reflect the greater affordability among this group to take overnight breaks and holidays.

Day visitor profile is also slightly skewed towards ABC1s

3.16 ABC1s make up around three in five (59%) day visitors, slightly higher than the UK population (55%). As day visitors are mostly not travelling far, this could be a reflection on the local population.

Overseas visitors nearly all ABC1

3.17 The overseas visitor profile is very skewed towards higher income groups. About five in six (82%) are ABC1s, which probably reflects the ABC1 group’s greater ability to afford overseas trips.
Visitor proportions similar to Wales overall

3.18 New, lapsed and repeat visitor proportions are similar to all of Wales. New visitors make up 14% of UK staying visitors, compared to 12% in the all of Wales results.

3.19 The day visitor profile is mostly made up of repeat visitors, as is the case with the day visitor profile to the whole of Wales.
4. Satisfaction Ratings

Overall trip satisfaction ratings

Very high trip satisfaction ratings with Ceredigion

4.1 Overall trip satisfaction among visitors to Ceredigion averages 9.5 out of 10 – a very good level of satisfaction, and similar to all of Wales generally (9.3). Rates across all categories are very strong, and are of a similar rating or higher rating than all of Wales.

“It’s heaven on earth”
Day visitor

“It’s like going home for me - I’ve all over the world and it’s the best place I’ve been”
UK staying visitor

Quality of the natural environment is a key selling point of Ceredigion

4.2 Satisfaction with the natural environment rates highly, and open comments strongly support this.
“It’s a lovely place with beautiful countryside”
UK staying visitor

“Excellent place to visit, green hills fresh air”
UK staying visitor

Great friendliness in Ceredigion

4.3 ‘Friendliness of people’ also rates very highly (9.7) by visitors in Ceredigion, as it also does in Wales generally (9.4).

“Green and friendly and good holiday destination”
UK staying visitor

Commercial aspects stronger than Wales generally

4.4 Commercial ratings of Ceredigion such as shopping (9.0), places to eat and drink (9.2) and value for money (9.1) are higher than the all of Wales results.

Satisfaction is high in both the summer and shoulder season

4.5 Trip satisfaction in the summer is very high (9.7), but it is also high (9.4) in the shoulder season.
Satisfaction ratings with attractions

Q19 (IF VISITED ATTRACTIONS) "Thinking about the attractions you have visited during your trip in Wales, how satisfied are you with the following aspects?"

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Ceredigion</th>
<th>All of Wales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your overall enjoyment</td>
<td>9.3</td>
<td>9.2</td>
</tr>
<tr>
<td>The service you received at them</td>
<td>9.2</td>
<td>9.3</td>
</tr>
<tr>
<td>Value for money</td>
<td>9.0</td>
<td>9.2</td>
</tr>
<tr>
<td>Standard of facilities</td>
<td>9.3</td>
<td>9.3</td>
</tr>
<tr>
<td>Range of attractions</td>
<td>9.1</td>
<td>9.3</td>
</tr>
</tbody>
</table>

High satisfaction with attractions

4.6 Visitors going to attractions during their trip give an average rating of 9.3 out of 10 for their overall enjoyment, which is similar to the score in the all of Wales result.

4.7 All other attributes are rated similarly or slightly higher than the scores out of ten for all of Wales.
5. Motivation for Visit

Type of trip

Q13 (STAYING VISITORS) "What type of trip are you on?"

Types of trip distribution similar to Wales as a whole

5.1 About half (46%) of UK staying visitors to Ceredigion are on a short break, which is lower than the all of Wales result (55%). The proportions visiting for their main holiday (23%) or secondary holiday (28%) are similar to the all of Wales results. The challenge would be to convert more of the short break takers into longer stays.

5.2 Overseas visitors are much more likely than UK visitors to be visiting for their main holiday, for obvious reasons, and the results are similar to the all of Wales results.

Holidays still taken in the shoulder season

5.3 A third (33%) of trips taken in the summer are main holidays. However a good proportion (24%) of visitors in the shoulder season take their main holiday in Ceredigion. Furthermore, 31% of visitors in the shoulder season are on their secondary holiday.
Motivation for visiting – all reasons

Q14a "Which of the following, if any, are your reasons for visiting Wales/this part of Wales for this particular trip?"

- To enjoy the landscape / countryside / beach: 67%
- To take part in outdoor activities: 33%
- To visit places / historical sites / specific attractions / sightseeing: 30%
- To visit friends or relatives: 17%
- To shop: 11%
- To attend an event / concert / performance / sporting match: 2%
- Other: 9%

Respondents could give more than one answer.

Landscape is a big draw to Ceredigion

5.4 About two thirds (67%) of visitors say that the ‘landscape / countryside / beach’ is one of the reasons for their visit to Ceredigion. This is especially true for UK staying visitors, of which 77% have cited the ‘landscape etc’ as a reason for their trip.

“Come and see the beauty”  
Day visitor

“Fantastic freedom in the countryside”  
UK staying visitor

UK staying visitors take part in outdoor activities

5.5 ‘To take part in outdoor activities’ is especially important for UK staying visitors (43%), but less so for day visitors (8%).

Historical sites a draw for overseas visitors

5.6 About two in five (39%) overseas visitors say they visit Ceredigion ‘to visit places / historical sites / specific attractions / sightseeing’. 
Friends and relatives are important for influencing overseas visits

5.7 Visits to friends and relatives are a key feature of visits. About two in five (39%) overseas visitors, 15% of UK staying visitors and 16% of day visitors have visited friends or relatives during their trip.

Shoulder season visitors more likely to visit places / historical sites etc

5.8 Between summer and autumn the motivation to enjoy ‘landscape / countryside / beach’ drops from 79% to 57%. At the same time, the motivation to ‘visit places / historical sites etc’ increases from 22% to 36%.

Motivation for visiting – main reason

### Q14b "And which one, if any, is your main reason for visiting Wales / this part of Wales?"

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To enjoy the landscape / countryside / beach</td>
<td>52%</td>
</tr>
<tr>
<td>To visit friends or relatives</td>
<td>13%</td>
</tr>
<tr>
<td>To take part in outdoor activities</td>
<td>12%</td>
</tr>
<tr>
<td>To visit places / historical sites / specific attractions / sightseeing</td>
<td>10%</td>
</tr>
<tr>
<td>To shop</td>
<td>6%</td>
</tr>
<tr>
<td>To attend an event / concert / performance / sporting match</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
</tbody>
</table>

The question is similar to the previous one except that respondents have been asked to give one answer only.

Landscape / countryside / beach stays on top

5.9 When asked the main reason for their visit, around half (52%) the respondents say it is ‘to enjoy the landscape / countryside / beach’. UK staying visitors are the visitor market most likely (58%) to head to Ceredigion for its natural attributes.

“It’s unappreciated and unspoiled”
UK staying visitor

“It’s beautiful, green and friendly”
UK staying visitor
5.10 This reason is much higher in the summer (67\% of respondents) compared to autumn (39\% of respondents), when the main motivation is spread more across the other reasons on the chart.

Catching up with friends and family

5.11 The second most popular reason (13\% of respondents) for visiting Ceredigion is to visit friends or relatives. This is especially relevant for overseas visitors (32\%).

More detailed reasons for visiting

![Chart showing top 10 specific activities undertaken during trip]

In the questionnaire, respondents have been asked further questions (Q15 – Q18) relating to broad motivation categories answered in Q14. The above chart brings together the top ten specific reasons for the trip. Full details can be viewed in the cross-tabulations.

Beaches are a big draw in Ceredigion

5.12 Visiting the beach is the most frequent activity undertaken among visitors. The UK enjoyed a spell of warm sunny weather in the summer of 2013. UK residents did not necessarily need to go abroad to enjoy a beach experience.

Taking in the sights

5.13 A third (33\%) of overseas visitors and 35\% of UK staying visitors say they enjoy touring as part of their trip to Ceredigion. Walking more than two miles is also a popular activity for 22\% of UK staying visitors.
6. Accommodation

**Q21 (STAYING VISITORS) “During your stay in Wales, what type of accommodation are you using?”**

- **Self catering house / cottage**: 24% (16% for UK staying visitors)
- **Owned static caravan**: 10% (8% for UK staying visitors)
- **Home of relation**: 8% (2% for UK staying visitors)
- **Rented static caravan**: 7% (4% for UK staying visitors)
- **Campsite**: 6% (3% for UK staying visitors)
- **Mid to large hotel**: 5% (2% for UK staying visitors)
- **Small hotel**: 4% (2% for UK staying visitors)
- **Bed & breakfast**: 4% (2% for UK staying visitors)
- **Towed caravan**: 4% (2% for UK staying visitors)
- **Self catering apartment / flat**: 3% (2% for UK staying visitors)
- **Guesthouse**: 3% (1% for UK staying visitors)
- **Home of friend**: 2% (1% for UK staying visitors)
- **Holiday park**: 1% (1% for UK staying visitors)
- **Hostel**: 1% (1% for UK staying visitors)
- **Farmhouse**: 1% (1% for UK staying visitors)
- **Other**: 5% (0% for UK staying visitors)

**Self catering popular in Ceredigion**

6.1 Around a quarter (24%) of staying visitors in Ceredigion opt to stay in a self catering house or cottage during their visit, including 26% of UK staying visitors.

**Keeping it in the family**

6.2 A significant proportion of overseas visitors choose to stay with family (22%) and friends (4%) during their stay in Ceredigion. This is far higher than the UK staying visitor market (family 8% and friends 2%).
Not everyone staying in commercial accommodation has stayed in Ceredigion

6.3 Respondents staying in paid commercial accommodation have been asked where they stayed the previous night. Some (31%) of those staying in commercial accommodation have stayed in a local authority area outside of Ceredigion.

6.4 As the question (of where they stayed) was just asked to those staying in paid commercial accommodation, it is not possible to deduce the locations of friends, relatives and places stayed in owned caravans, and filter out those staying outside Ceredigion from Q21 above.

6.5 However those staying in paid commercial accommodation outside Ceredigion are excluded from the satisfaction ratings below:

Satisfaction with accommodation

![Bar chart showing satisfaction with accommodation]

Ceredigion accommodation marginally ahead of all of Wales

6.6 Visitors staying in Ceredigion rate their accommodation very well – similar, but slightly better to the all of Wales results. Overall satisfaction is rated at 9.2 out of 10. However, overseas visitors rate each aspect of their stay lower than UK staying visitors.
Booking accommodation

Q24 "How did you book your accommodation?"

- Directly with the provider: 50%
- Through a tourism website: 16%
- Just turned up: 13%
- Through a travel agent or tour operator: 5%
- Through a third party accommodation site: 4%
- Through a tourist information centre: 3%
- Through a deals site: 3%
- Don’t know: 6%

Booking directly

6.7 Half (50%) of all staying respondents book their accommodation directly with the provider, either by phone, e-mail or the provider’s website. A further 16% book through a tourism website, and 13% just turn up – including 26% of overseas visitors.
7. Dylan Thomas

Have visitors heard of Dylan Thomas

![Bar Chart](Q26_Have_you Heard of Dylan Thomas.png)

Majority have heard of Dylan Thomas

7.1 The vast majority (96%) of Welsh visitors and most (84%) UK visitors from outside Wales have heard of Dylan Thomas.

7.2 Having visited Ceredigion previously could have an impact on whether people have heard of Dylan Thomas, as 93% of repeat visitors have heard of the poet, compared to a lower proportion (79%) of new visitors.
Dylan Thomas place associations

**Q27 "If yes, which places in Wales would you associate with Dylan Thomas?"**

<table>
<thead>
<tr>
<th>Place</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laugharne / Boathouse</td>
<td>48%</td>
</tr>
<tr>
<td>Swansea</td>
<td>35%</td>
</tr>
<tr>
<td>New Quay</td>
<td>32%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
<tr>
<td>None</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Laugharne tops the Dylan Thomas place association**

7.3 A large proportion (48%) of visitors associate Laugharne and/or the Boathouse with Dylan Thomas, including 65% of day visitors.

7.4 Swansea is also widely associated with the poet by both UK staying visitors (34%) and day visitors (43%).

7.5 Around a third (32%) of visitors say they associate Dylan Thomas with the Ceredigion seaside town of New Quay.
8. Return Visit

Likelihood of returning soon

**Q25 "How likely are you to make another visit to / within Wales in the next few years?"**

<table>
<thead>
<tr>
<th></th>
<th>UK staying visitors</th>
<th>Day visitors</th>
<th>Overseas visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definitely will</td>
<td>91%</td>
<td>88%</td>
<td></td>
</tr>
<tr>
<td>Probably will</td>
<td>9%</td>
<td>11%</td>
<td>37%</td>
</tr>
<tr>
<td>Probably won't</td>
<td>0%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Definitely won't</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Base: 374

Day and UK staying visitors coming back for more

8.1 Following very strong trip satisfaction, intentions to return soon are very high. In the day visitor market, the vast majority (91%) say they will ‘definitely’ make another visit to / within Wales in the next few years, as do 88% of UK staying visitors.

Intentions not to return soon are likely to be linked to circumstances

8.2 Intentions not to return soon seem more likely to be related to circumstances (e.g. geographical distance from Wales and old age) than satisfaction because trip satisfaction ratings among those not intending to return soon are so high.
9. Implications for Marketing and Product Development

9.1 What is the Ceredigion visitor survey telling us? Below we conclude with the main implications for marketing and product development based on the research findings.

Attracting new and lapsed visitors to Ceredigion

Advocacy is a powerful form of influence

9.2 Satisfaction with trips to Ceredigion is extremely high – even higher than the all of Wales average. At the same time, Information Needs Research undertaken by Visit Wales has confirmed that recommendations and shared experiences from friends / relatives / colleagues are one of the most powerful influences on new destination choice, and for some, it is the most powerful influence.

9.3 Anything which can be done to encourage advocacy among visitors will have a significant impact on attracting new and lapsed visitors to Ceredigion.

Ceredigion attracts visitors from England and South Wales, but North Wales residents are not coming

9.4 English residents are very well represented in Ceredigion’s staying visitor profile, and South Wales provides most of the day visitors.

9.5 However residents in neighbouring North Wales appear not to be making the trip down to Ceredigion in great numbers, either for staying or day visits. This may be an issue to address.

Ceredigion appeals to older generation and families but not younger generation

9.6 Ceredigion is an attractive region for the older generation and for families with young children. Promoting the area to these groups is likely to yield good returns.

9.7 The destination seems to appeal much less to young adults and families with older children. Whether to try and attract more visitors from the younger market is a decision for the marketing team, but it may well require substantial investment.
Beaches are a significant draw

9.8 Ceredigion’s beaches stand out as a significant draw for visitors. Quality beaches are a strong attribute of Wales in general, but in Ceredigion the draw of the beach appears to be strong even in comparison to some other areas of Wales that have beaches.

Ceredigion is a good destination for different seasons

9.9 Trip satisfaction in the autumn remains very high. Visitors find alternative things to do compared to the summer (usually more indoors). However, the good proportion of visitors taking holidays outside of the peak summer season is encouraging.

Most staying visitors do actually stay in Ceredigion

9.10 The geographical position of Ceredigion in between North and South Wales makes it susceptible to being a ‘pass through’ destination which people might not necessarily stay in. The results of this visitor survey however suggest that is not really the case, as the majority (69%) of staying visitors have actually stayed in Ceredigion.

High awareness of Dylan Thomas, but weaker association with New Quay

9.11 Most visitors to Ceredigion, including from England and overseas, have heard of Dylan Thomas.

9.12 However if Ceredigion is to take advantage for tourism purposes, the association between Dylan Thomas and New Quay needs to increase. Currently many more of those aware associate the poet with Laugharne and/or the Boathouse.