SPARC VISITOR SURVEY 1999
EXECUTIVE SUMMARY

This report presents the findings of the SPARC 1999 Visitor Survey carried out in South Pembrokeshire in 1999. The first such survey was undertaken in 1997. The survey aims to collect information from a wide cross section of visitors and potential visitors to the area. It explores their needs, attitudes and preferences when planning and visiting the area, in order to better inform the main tourism agencies and small local businesses operating in the area. The survey is based on a large, unstructured, random sample of 1725 respondents, questionnaired by interview. The aim of this report is to present an analysis of the results of the 1999 survey, to compare these with the results of the 1997 and 1998 surveys, and to present the key findings and issues highlighted by the data.

KEY FINDINGS:

Demographic Characteristics

- The majority of visitors in the sample (93.7%) came from the UK, with 3.1% coming from Europe, mainly Germany and The Netherlands.
- A large proportion of the sample (81.3%) were middle to high income earners in socio-economic Groups C1, B and C2. Higher proportions of those in Group C1 were aged 18-44 (57.4%), in Group B were aged 45-54 (29.6%), and in Group D were aged 55+ (35.0%).
- The majority were home owners (84.3%). Over a quarter (26.6%) had access to the Internet at work, and almost one in three (31.2%) had access to it at home.

Visiting Pembrokeshire

- Most respondents (92.0%) were visiting Pembrokeshire for Holiday or Leisure. Over half the sample (51.8%) were not accompanied by children.
- Three quarters of the sample (74.3%) were on Long Holidays (4 nights or more), 16.2% were on Short Breaks (1-3 nights), and 7.2% were on Day Trips – from home. This was the main holiday of the year for over half the sample (54.4%).
- Most respondents found out about Pembrokeshire because people had Been Before (53.0%), seen Advertisements (17.4%), or by Word of Mouth (15.8%).
- The most popular reasons for visiting Pembrokeshire were the Attractive Coast (55.1%), Attractive Countryside (39.9%), and because they'd Been Before (35.5%). Most travelled to the area by car (87.0%), and those who did use public transport were satisfied but some found it inconvenient and unpunctual.
- Tenby and Saundersfoot were the most popular accommodation bases, along with the Inland Borderlands (Narberth, Lawrenny).

Accommodation

- The most popular types of accommodation were Static Caravans (18.1%), Self-Catering Cottages/Flats/Chalets (16.0%), and Guesthouses/B&B/Farmhouses (15.7%). The self-catering sector was generally more popular, while the serviced sector was still important in Tenby (49.5%), and also Haverfordwest & St Brides Bay (41.7%), and Pembroke (36.0%). Hotels were particularly popular in Tenby.
- The largest proportion booked their accommodation In Advance direct with a Proprietor (46.8%). Those booking On Arrival direct with a Proprietor favoured Tents and

Guesthouse/B&B/Farmhouse accommodation, those booking In Advance direct with a Proprietor preferred Static Caravans and Self-Catering Cottages/Flats/Chalets, and those booking In Advance through an Agency also favoured the latter. Hotels and Static Caravans were more popular among older age groups, especially those aged 65+, and younger people preferred Tents and Touring Caravans.

- Quality of accommodation was perceived as high, with 65.1% saying it was Excellent or Good.
- Just under one in five (19.1%) thought Verification by the Wales Tourist Board was an important consideration, with almost a third (30.1%) believing it not to be important. Verification was more important to those staying in the serviced sector (Hotels and Guesthouses/B&B/Farmhouses), and also to a lesser extent to those staying in Self-Catering Cottages/Flats/Chalets.

Activities and Attractions

- The most popular activities were Walking (56.2%), Touring by Car (51.9%), and Swimming (36.7%). Older age groups (55+) preferred Bird Watching and Golf, and younger age groups enjoyed Watersports, Cycling, and Horse Riding.
- The Pembrokeshire Coastal Path was the most popular footpath, with 19.4% saying they would walk footpaths every day during their visit, and 12.3% walking every other day, mostly up to three miles a day.
- The most popular attractions in the area were Castles, Pembrokeshire Islands, Bosherston Lilly Ponds, Oakwood, and Farm Based Attractions. Among older age groups (55+) Spiritual Heritage Centres, Art & Craft Galleries, and Gardens and Garden Centres were favourites, while younger age groups (25-34) were drawn more to Farm Based Attractions and Oakwood.
- Half the sample (50.4%) said they were likely to visit a Tourist Information Centre somewhere in the area, with Tenby, Kilgetty, Saundersfoot, and Pembroke being the ones most likely to be visited. Those unlikely to use TICs either knew the area well, or had picked up leaflets/information at their accommodation/other sites. Least likely to use TICs were older age groups (55+) as well as the younger group (18-25), and those in socio-economic Group D. Most likely to use TICs were those in Groups B and C1.
- The largest proportions were spending under £10 (22.7%) and £11-£20 (20.6%) on Accommodation, and £11-£20 (43.2%) on Other Goods. Spending on Accommodation increased with increasing age, but no clear pattern emerged for spending on Other Goods.
- Type of accommodation clearly affected expenditure, with those staying in Hotels spending larger amounts more often on both their room and Other Goods. Those staying in Tents and Touring Caravans were spending less on Accommodation.
- The most popular goods and services respondents spent on were Food & Drink in cafés and restaurants (68.8%), Petrol (in Pembrokeshire) (60.0%), Food & Drink in shops (56.9%), and Admission Fees (52.7%)

Future Plans and Possible Improvements

- An Attractive Coast (69.3%), Peace and Tranquillity (57.4%), and Attractive Countryside (47.0%) were the most appealing features of the area. Peace and Tranquillity, a Friendly Welcome, Quality Accommodation, and Local Food were increasingly important with increasing age (especially for those 55+). The Coast and Countryside were more appealing features to younger age groups.

- Suggestions for improvements needed most in the area focused on Toilets, Parking, Sign Posting, and Traffic Problems.
- Less than half the sample (47.0%) intended to visit Pembrokeshire again in the next 12 months. This was mostly for Long Holidays (4 nights or more) (59.6%), with a significant proportions intending to come on Short Breaks (28.1%), and 10.9% were planning Day Trips – from home. This was mainly in the self-catering sector. Over a quarter (27.0%) did not intend to return in the next year, in most cases this was because they wanted to visit somewhere different, and 23.8% were undecided.

Changes over Time

- The 1999 sample had a higher and more realistic proportion of elderly represented than in the 1998 or 1997 samples. The proportion of visitors to the area from Wales had increased noticeable from 18.7% in 1998 to 23.5% in 1999.
- Internet access at work had increased from 23.5% to 26.6%, while those having access to the Internet at home had risen from 9.4% in 1997 to 31.2% in 1999.
- Long Holidays (4 nights or more) had decreased slightly from 79.1% in 1998 to 74.3% in 1999, Short Breaks had also declined though less so, from 17.0% in 1997 to 16.2% in 1999, while Day Trips had shown an increase from 2.5% in 1998 to 7.2% in 1999.
- Residents were still finding out about Pembrokeshire because they had been before and because of word of mouth, but those who had found out because of advertising had risen significantly from 6.4% in 1998 to 17.4% in 1999. The attractive coast and countryside were still important reasons for visiting the area, while the fact that respondents had been before was less important.
- Tenby had decreased slightly in popularity as a base where people stayed, from 29.3% in 1998 to 25.1% in 1999. On the other hand, the Inland Borderlands and Haverfordwest & St Brides Bay had increased in popularity.
- The serviced sector had declined in popularity in 1999, while Touring, Tenting and Static Caravans were showing an increase. There was also a slight decrease in the percentage staying in Tenby in Hotels and Guesthouses/B&B/Farmhouses, while the largest decrease was in those staying in Saundersfoot in Guesthouses/B&B/Farmhouses which fell from 26.4% in 1998 to 9.9% in 1999.
- There was a continued increase in those booking their visit In Advance direct with a Proprietor, from 48.6% in 1997 to 59.1% in 1999. Booking In Advance through an Agency decreased from 27.0% in 1997 to 8.8% in 1999.
- Perceptions of excellence in the quality of accommodation had declined somewhat, with 54.9% saying this was Excellent in 1998 compared with 38.1% in 1999, and this was across all accommodation types with the exception of Hostels which showed an increase or improvement.
- Verification of accommodation by the Wales Tourist Board continued to decline in importance, from 34.5% who considered it an important factor in 1997 to 19.1% in 1999. It was least important to those staying in Tents and Guesthouses /B&B /Farmhouses, and showed a slight increase in importance for those in Static and Touring Caravans.
- The Pembrokeshire Coastal Path was the most popular footpath in all three samples. An increased number participated over time with 34.2% saying they walked a footpath every day in 1997 and 41.6% doing this in 1999.

- Kilgetty Tourist Information Centre increased in popularity between 1998 and 1999, while Tenby TIC remained the most popular, with Saundersfoot and Pembroke TICs being less so.
- More were spending on Food and Drink in cafés and restaurants in 1999 than in 1998, with slightly fewer spending on Petrol (in Pembrokeshire), and more on Food and Drink in Shops.
- Features appealing most to visitors were similar across all three samples, namely the Coast, Peace and Tranquillity, and the Countryside. The area's Heritage, and Visitor Attractions had gained in popularity in 1999.
- The proportion of respondents intending to return to the area in the next 12 months showed a decrease, from 54.5% in 1998 to 47.0% in 1999. Fewer were planning Long Holidays in the 1999 sample (59.6% compared with 70.6% in 1998), and Day Trips from home showed a increase from 2.0% intending to take them as part of the 1998 sample to 10.9% in the 1999 survey. Static Caravans and the self-catering sector were drawing more people back to the area.

KEY ISSUES:

- There is a potential to develop both the European and Overseas market for visitors to Pembrokeshire, and also to increase the numbers of those visiting from Scotland and Northern Ireland, while the proportion visiting from Wales has shown an increase.
- Given the importance of an ageing population within the UK and into this century, then any investment in exploring and addressing the different needs and preferences of these older age groups would be worthwhile. The results of this survey highlight some of these differences which need further development.
- Internet access is clearly increasing, with one in three respondents in this survey having access to it from their homes, as well as access at work for many. This is an important way of reaching potential visitors to the area, in their homes as well as at work, at a global level, and a trend likely to continue increasing.
- There is still scope for increased and improved advertising of Pembrokeshire, leading to a potential increase in visitors to the area, and this also links well with Internet access. A significant increase has already occurred between 1998 and 1999 in those influenced by advertisements about Pembrokeshire, and this trend could be developed further.
- A trend has established of those booking their visits to the area In Advance direct with Proprietors, and this suggests a focus which could be developed further to the benefit of the proprietors and local businesses in Pembrokeshire.
- Verification is an issue that the Wales Tourist Board, and proprietors of local tourism properties, may wish to explore in the area, given the continued decline of its importance as a consideration in selecting somewhere to stay. Unfortunately no details are available from this survey as to why this trend should be occurring.
- The proportion of respondents visiting and making use of Tourist Information Centres was stable between 1998 and 1999, though not increased. Understandably, less use may be made of these by people returning to the area and being familiar with it, but given that older age groups are less likely to use TICs then this could be a fruitful area to explore and address in more detail in the immediate future.
- There is a clear potential to develop the attraction of the Short Break Holiday in Pembrokeshire, as well as encourage an interest in Long Holidays, and develop the increased interest in Day Trips from home to the area.

- There was an increased interest in eating out in the area, and in spending on Food and Drink both in cafés and restaurants and in shops, but the frequency of spending had decreased. There clearly exists an important link between the tourist sector and the area's local economy, highlighting the potential to develop aspects of visitor spending, in frequency and amount, which would ultimately benefit and expand the local economy.

SPARC VISITOR SURVEY 1999

I. INTRODUCTION

This report presents the findings of the SPARC 1999 Visitor Survey carried out in South Pembrokeshire in 1999. This is the third such survey to be completed, the first being in 1997, and the second in 1998. The aim of the survey is to collect information from as wide a cross section of visitors and potential visitors to the area as possible, and to investigate their needs, attitudes, and preferences when planning and visiting the area.

The tourism market is a fluctuating one, and it is important that tourism groups and small businesses operating in the local area are well informed about this changing market and can react quickly and effectively to these trends and changes. It is hoped that the results in this report can help them do this.

The methodology of the survey was based on a large random unstructured sample of 1725 completed questionnaires. The majority of these were done by interview at locations covering the SPARC area of South Pembrokeshire, with a small percentage being self completed and having been distributed by tourism businesses and at Kilgetty Tourist Information Centre.

The aim of this report is to present the results of the questionnaire survey, to analyse some aspects of the findings in more detail where appropriate in order to develop a more meaningful narrative of these issues and changes, and to also compare the findings with those of the two surveys done to date. To this end, the report begins with an Executive Summary of these key findings and issues. The main body of the text contains 6 sections, the first five of which take the reader through the survey results for 1999, and the final section presents a comparison of changes over time between all the three surveys. A summary of the key results follows, along with conclusions relating to the key issues which have been highlighted by the results. A copy of the original questionnaires used are included in the Appendix.

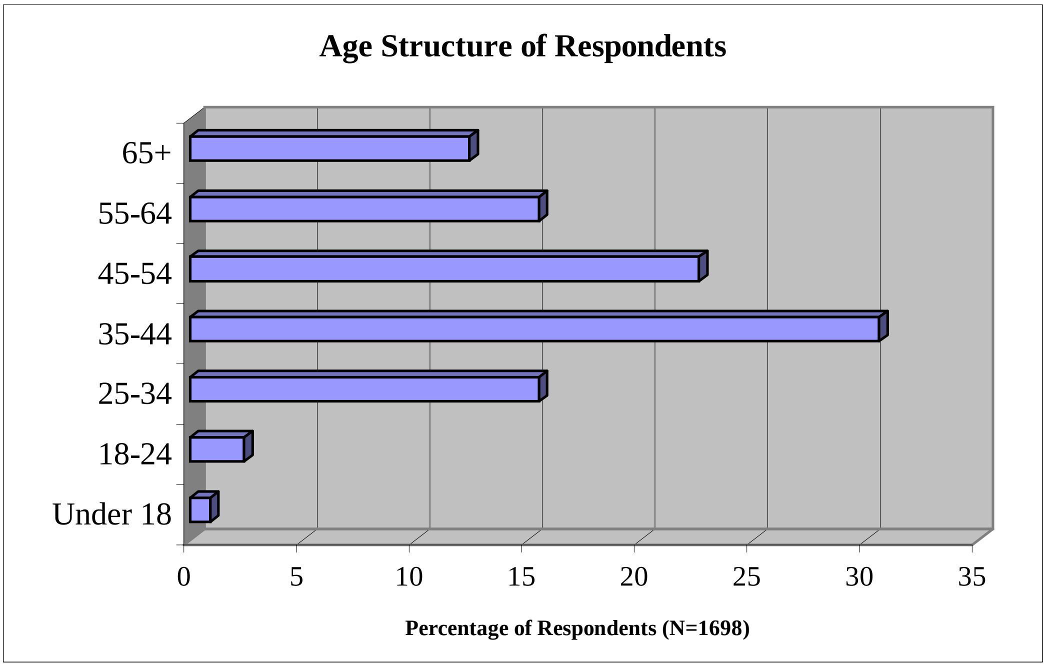
The data has been analysed and interpreted, and this report has been written by an independent consultant, Dr Lyneth M. Davies.

II. SPARC VISITOR SURVEY 1999

1. DEMOGRAPHIC CHARACTERISTICS

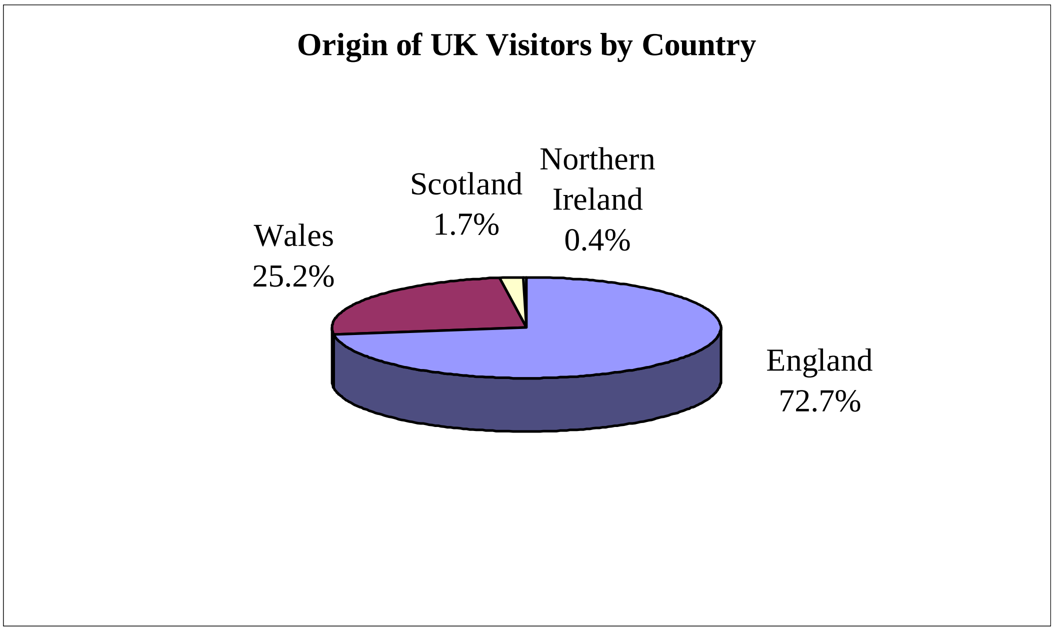
A total of 1725 visitors to the SPARC area were interviewed and form the sample for the SPARC Visitor Survey. The three key months for interviewing were July, August, and September and 93.0% of interviews were done during this period. Of these, two thirds of the sample (66.9%) were interviewed in August, 18.0% were interviewed in July, and 15.1% interviewed in September. As can be seen in Figure 1, of this sample of visitors over half (53.1%) were aged between 35 and 54, with 30.5% aged 35-44 and 22.6% aged 45-54. A further 15.5% were aged 25-34, along with 15.5% in the 55-64 cohort, and followed by 12.4% aged over 65 years old.

Figure 1: Age Structure of Respondents.



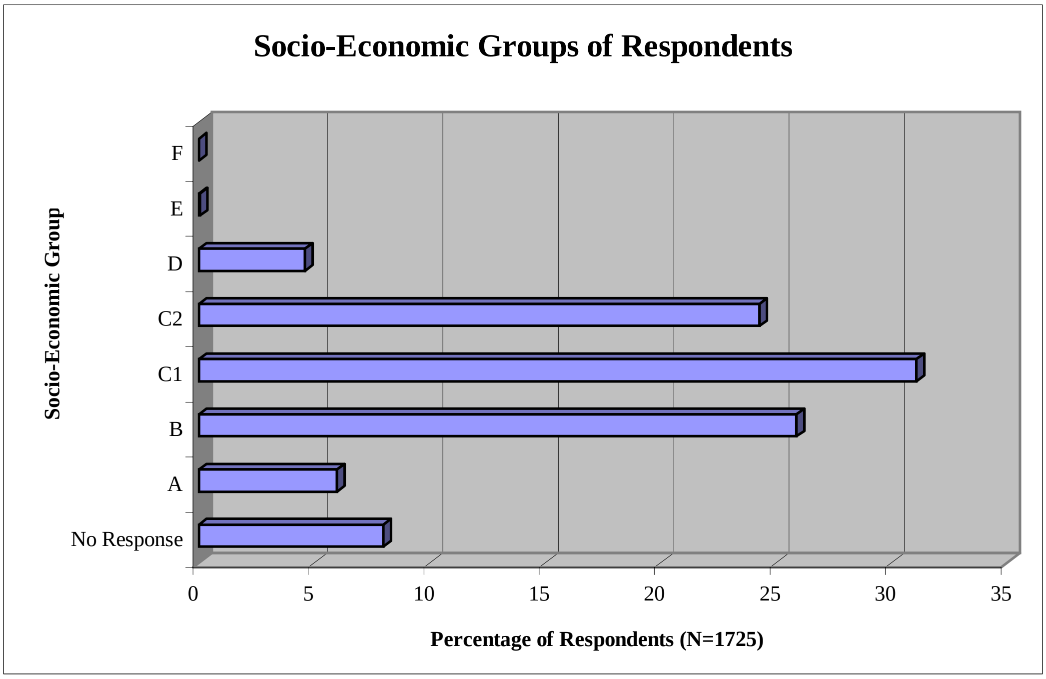
Very few of the visitors in the sample came from outside the UK, with 3.1% coming from Europe (most popularly Germany and Holland), and 1.7% being overseas visitors from outside Europe (USA, Australia and Canada). Nearly seventy percent (68.1%) of the respondents came from England, with 23.5% coming from Wales, 1.7% from Scotland, 0.4% from Northern Ireland, and 0.6% coming from Southern Ireland. Figure 2 (page 8) shows these results in a UK context, with 72.7% coming from England, 25.2% from Wales, 1.7% from Scotland, and 0.4% coming from Northern Ireland.

Figure 2: Origin of UK Visitors to the SPARC Area.



Respondents were asked what their occupation was, or the occupation of the principal wage earner, or if they were retired what their previous occupation had been. These occupations were then coded according to seven grades or socio-economic groups from Group A to F (with Group C divided into C1 and C2). These results are shown in Figure 3.

Figure 3: Socio-Economic Groups of Respondents.



Of those who responded, the highest proportions were found among Group C1 (31.1%) which include Supervisory or Clerical workers, Junior Managerial, Administrative or Professional workers, as shown overleaf in Figure 3 (page 8). Next came Group B (25.9%), made up of Intermediate Managerial, Administrative or Professional individuals; and Group C2 (24.3%) which include Skilled Manual Workers. Fewer were Group A workers (6.0%) made up of Higher Managerial, Administrative or Professional occupations, or Group D (4.6%) Semi-skilled and Unskilled Manual Workers, and only one individual (0.05%) was in Group E which include State Pensioners or Widows (no other earners), Casual or Lowest Grade Workers or Long Term Unemployed. Group E may be under-represented if those retired and on state pensions gave their earlier occupations as answers, as directed on the questionnaire. No group F responses were given which covers Students, and the remaining 8.0% did not respond to the question.

When age is compared with socio-economic group, as shown in the cross tabulation below in Table 1, the overall results reflect the demographic patterns of Figures 1 and 3. In other words, because a large proportion of the sample is aged between 35-54 this is also reflected across the socio-economic groups. Similarly, looking across the table by age group, socio-economic groups C1, B, and C2 stand out for the same reason. The most interesting trends shown in the cross-tab are that the highest level of 18-44 year olds is found in Group C1 (57.4%) (Supervisory, Clerical, Junior Managerial, Administrative or Professional), while the largest percentage aged 45-54 is found in Group B (29.6%) (Intermediate Managerial, Administrative or Professional). The age profile of Group D workers in the sample (Semi and Unskilled Manual) shows a significant proportion aged 55 and over (35.0%), followed by Group A (31.7%) and Group C1 (31.7%).

Table 1: Age Structure by Socio-Economic Group.

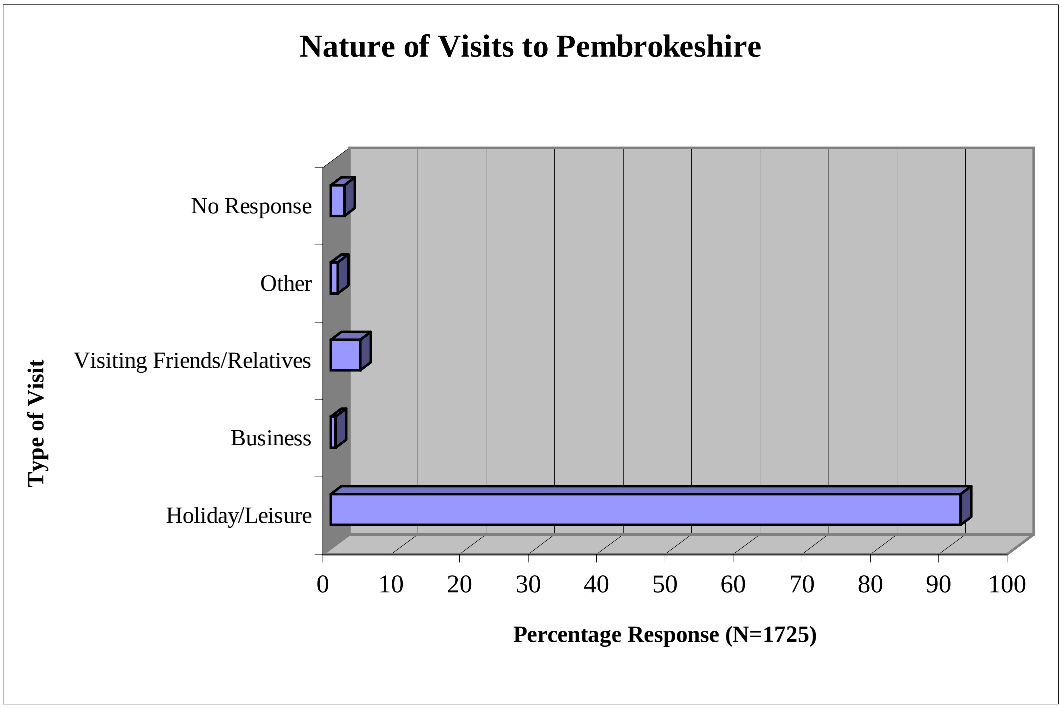
Age Group			Socio-	Economic	Groups			
	A	B	C1	C2	D	E	No response	Total
Under 18	1	4	3	1	0	0	7	16
(%)	6.0	25.0	29.0	6.0	0.0	0.0	44.0	100.0
18-24	2	0	28	8	1	0	2	41
(%)	5.0	0.0	68.0	20.0	2.0	0.0	5.0	100.0
25-34	2	38	128	61	14	0	21	264
(%)	1.0	14.0	48.0	23.0	5.0	0.0	8.0	100.0
35-44	43	161	152	120	19	0	23	518
(%)	8.0	31.0	29.0	23.0	4.0	0.0	4.0	100.0
45-54	23	132	94	89	16	1	29	384
(%)	6.0	34.0	24.0	23.0	4.0	0.0	8.0	100.0
55-64	21	64	67	79	10	0	23	264
(%)	8.0	24.0	25.0	30.0	4.0	0.0	9.0	100.0
65+	12	44	62	54	18	0	21	211
(%)	6.0	21.0	29.0	26.0	9.0	0.0	10.0	100.0
No response	0	3	3	7	2	0	12	27
Total	104	446	537	419	80	1	138	1725

The majority of respondents to the questionnaire were home owners (84.3%), with 14.5% replying that they did not own their home, and only 1.2% did not answer the question. When asked if they had access to the Internet either at home or at work, 26.6% said they had access at work, and 31.2% had access at home. The remaining 42.2% did not answer this question.

2. VISITING PEMBROKESHIRE

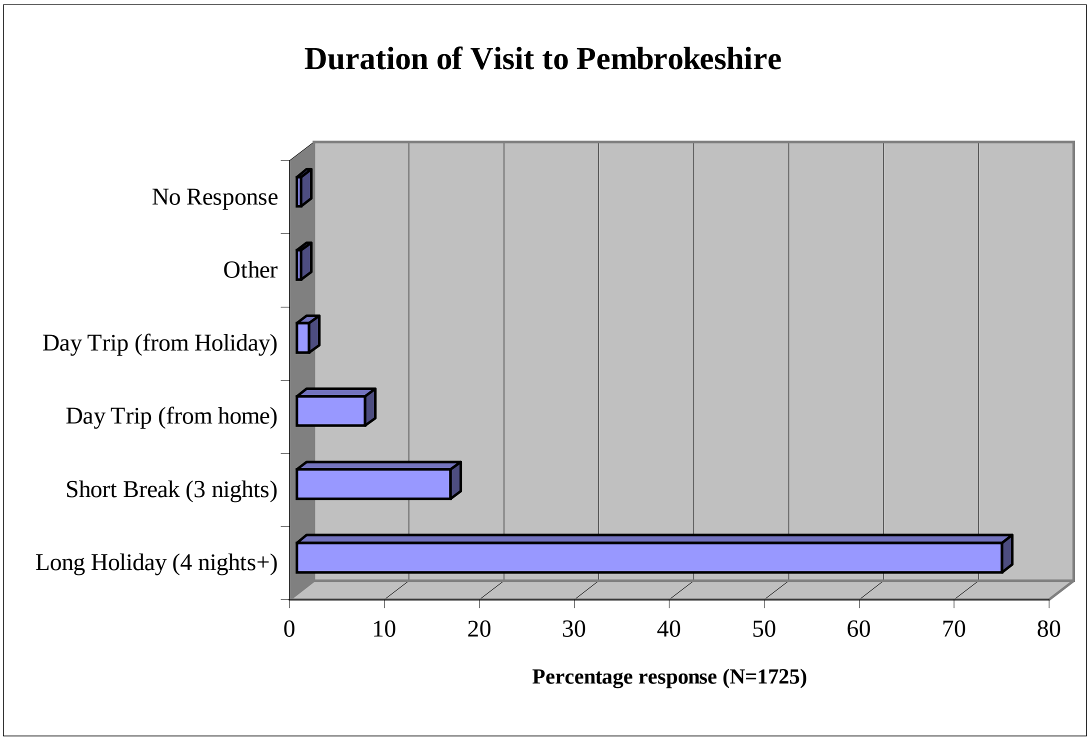
In this section respondents were asked about visiting Pembrokeshire, the nature and duration of their visit, why and how they decided to come to the area, how they had travelled, and in which part of the area they stayed. The vast majority of respondents (92.0%) were visiting Pembrokeshire for a ***'Holiday or Leisure'***. A small number were ***'Visiting friends and relatives'*** (4.3%), with only 12 cases (0.7%) there on ***'Business'***. Other reasons for visiting included *'School trips', and a 'Duke of Edinburgh Award event'*, and 2.0% did not respond. These results are illustrated in Figure 4 below. The majority of adults responding to the questionnaire travelled in groups of less than 10 adults (97.2%); less than half the sample (48.2%) had children with them, and the majority (97.6%) of those who did had less than five children.

Figure 4: The Nature of Visits to Pembrokeshire.



When asked about the duration of their visit to Pembrokeshire nearly three quarters of the sample (74.3%) said they were on a ***'Long Holiday'*** (of 4 nights or more). A further 16.2% were on a ***'Short Break'*** (1-3 nights), 7.2% were on a ***'Day Trip – from home'***, and as shown in Figure 5 (below) only small numbers were on a ***'Day Trip – from holiday'*** (1.3%). Other responses given (0.5%) included *'Passing through'* and *'On tour'*, and only 0.5% did not respond. It was the main holiday of the year for 54.4% of the sample, with 38.9% saying No, and 2.8% answering Don't Know, and the remaining 3.9% did not respond.

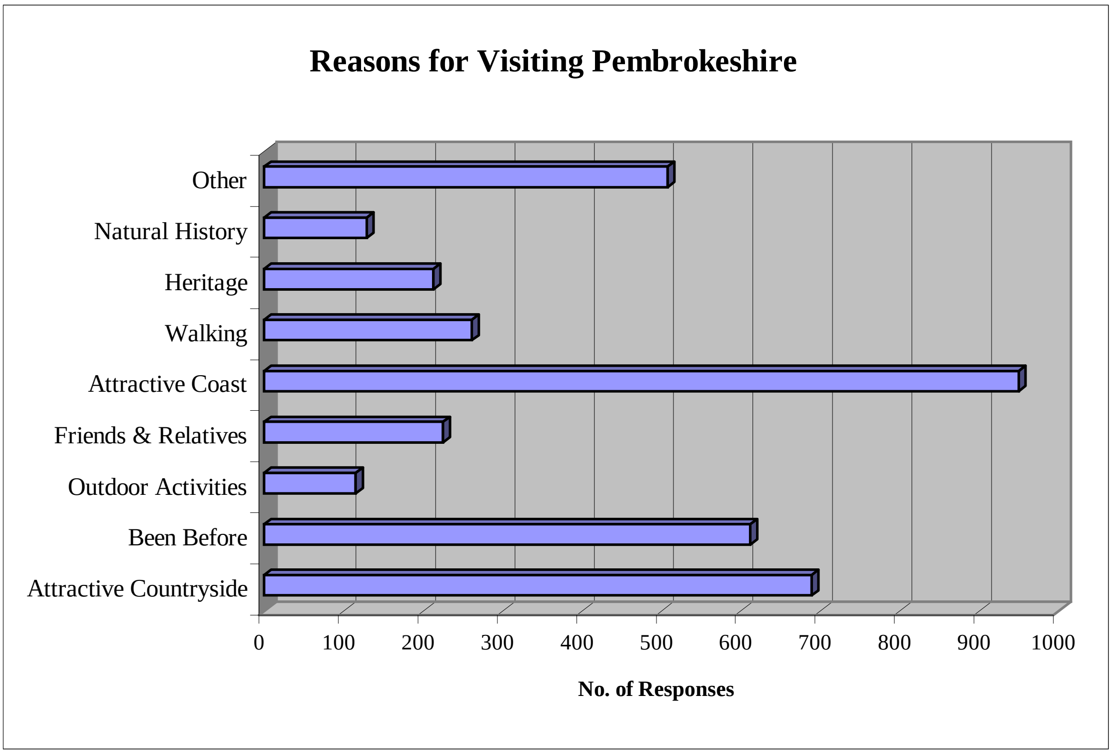
Figure 5: Duration of Visits.



Several different sources were mentioned when respondents were asked how they found out about Pembrokeshire, but of the categories offered in the questionnaire the most popular by far was ***'They'd been to the area before'*** (913 responses). This was followed by ***'Advertisement'*** (300), and ***'Word of Mouth/Recommendation'*** (273). Only 22 respondents had found out about Pembrokeshire through ***'Television'***, or through the ***'Radio'*** (2), or ***'Exhibitions'*** (1). A total of 284 replied that they found out through 'Other' ways but no details were recorded.

Reasons for choosing to visit Pembrokeshire were many and varied, and the most popular were ***'Attractive Coast'*** (950 responses), ***'Attractive Countryside'*** (689), and ***'Been Before'*** (612). Figure 6 (page 12) illustrating this also shows that a significant number decided to visit because of the ***'Walking'*** (261), ***'Friends and Relatives'*** (225), and the area's ***'Heritage'*** (213). Fewer came for the area's ***'Natural History'*** (129), and ***'Outdoor Activities'*** (115). A further 508 replied 'Other' but no details were given.

Figure 6: Reasons for Choosing to Visit Pembrokeshire.



Three questions related to travel, and respondents were asked a) how did they travel to Pembrokeshire, b) once in Pembrokeshire how did they travel, and c) if they used public transport was it efficient. The majority of the sample travelled to the area by ***'Car'*** (87.0%), with only 4.8% travelling by ***'Bus (organised trip)'***, 3.4% by ***'Train'***, and 1.8% by ***'Bus (public transport)'***. In a small number of cases people travelled by ***'Motorcycle'*** (0.7%), ***'Ferry'*** (0.3%), and ***'Minibus'*** (0.2%), and 1.8% replied ***'Other'***. These alternatives included a *'Motorhome/Campervan'* (19 responses), and three had travelled by plane (to Cardiff).

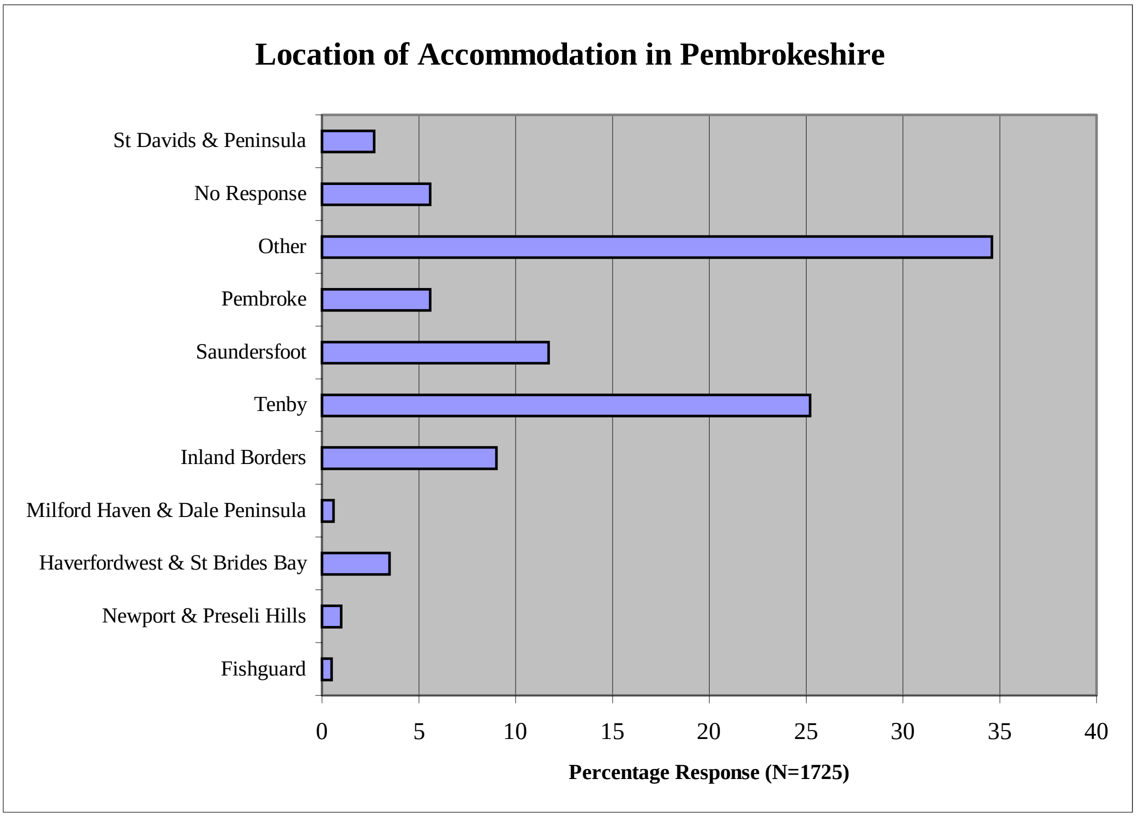
Once in Pembrokeshire again the majority travelled by ***'Car'*** (81.3%). Only small proportions travelled ***'On Foot'*** (4.2%), ***'Bus – public transport'*** (2.0%), ***'Hire Car'*** (1.9%), ***'Motorcycle'*** (0.8%), ***'Train'*** (0.3%), ***'Bicycle'*** (0.3%), or ***'Taxi'*** (0.2%). A further 3.7% travelled by ***'Coach Trip/Tour'*** as an 'Other' means of travelling.

Most of those who used public transport thought it was ***'Comfortable'*** (82.7%), ***'Clean'*** (82.7%), ***'Punctual'*** (66.3%), and ***'Convenient'*** (64.2%), while only some dissatisfaction was expressed about ***'Convenience'*** (29.5%) and ***'Punctuality'*** (26.7%).

Finally in this section, respondents were asked in what area of Pembrokeshire was their accommodation based, and they were given ten options to choose from. As Figure 7 (page 13) shows, the most popular location selected was ***'Tenby'*** (25.1%), followed by ***'Saundersfoot'*** (11.7%), the ***'Inland Borders (Narberth, Lawrenny)*** (9.0%), ***'Pembroke'*** (5.6%), ***'Haverfordwest and St Brides Bay'*** (3.5%), and ***'St David's & Peninsula'*** (2.7%).

The highest proportion of responses to this question answered ***'Other'*** (34.6%), and the most popular locations mentioned by these included ***'Freshwater East'*** (53 responses), ***'Manorbier'*** (49), ***'Penally'*** (40), ***'Amroth'*** (30), ***'Angle'*** (29), ***'Kilgetty'*** (27), ***'Carmarthen'*** (22), ***'Lydstep'*** (21), ***'New Hedges'*** (16), ***'St Florence'*** (14), ***'Cardigan'*** (13), ***'Pendine'*** (13), ***'Broad Haven'*** (12), ***'Wisemans Bridge'*** (10), and ***'Swansea'*** (9). Only 5.6% did not respond to the question.

Figure7: Location of Accommodation.



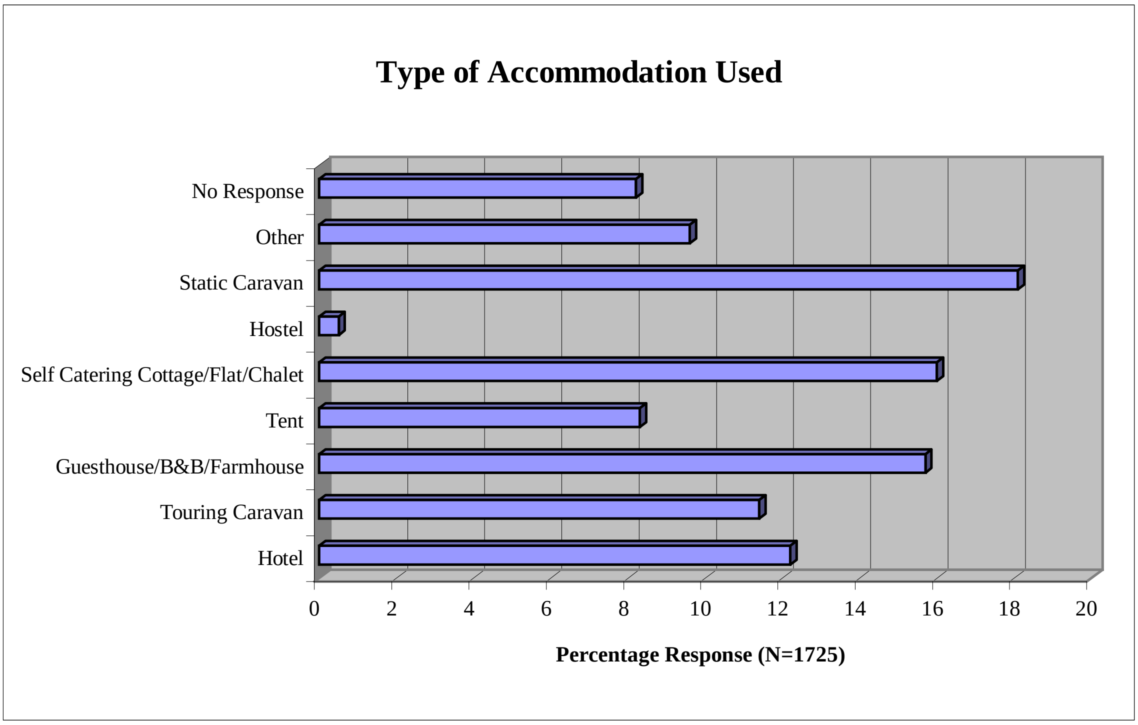
3. ACCOMMODATION

Respondents were asked about the accommodation they used during their visit, its type, how they had booked, how they rated the quality of their accommodation, and how important it was to them that the accommodation was verified by the Wales Tourist Board.

The first of these four issues relating to accommodation was its type, and the most popular stayed in by the respondents were ***'Static Caravans'*** (18.1%), ***'Self Catering Cottage /Flat /Chalet'*** (16.0%), and ***'Guesthouse/B&B/Farmhouse'*** (15.7%). Fewer stayed in a ***'Hotel'*** (12.2%), ***'Touring Caravan'*** (11.4%), ***'Tent'*** (8.3%), and only 0.4% stayed in a ***'Hostel'***. These results are shown in Figure 8 (Page 14). A further 9.6% mentioned ***'Other'*** types of accommodation, the most popular of which was staying at ***'Relatives/friends house/***

cottage' (112 responses), while some used ***'Mobile/Motor Homes'*** (19), and some stayed at ***'Field Study Centres'*** (4). A total of 8.2% did not reply.

Figure 8: Type of Accommodation Used.



These results also indicate the popularity of two accommodation sectors, namely the serviced and self-catering sector. In general terms the data suggests that the self-catering sector is more popular than the serviced sector in the southern area of Pembrokeshire. A more detailed analysis of the data shows interesting trends and attitudes among respondents, and highlights particular areas of demand and preference. Table 2 (page 15) shows a comparison of accommodation type by location, suggesting the way this varies geographically across the area. Clearly Tenby and Saundersfoot are the most popular centres used by visitors in the sample for accommodation, as established earlier, and the serviced sector is more popular in both these centres. Together Hotels and Guesthouse/ B&B/Farmhouse accommodation account for 49.5% of those staying in Tenby and 32.8% of those staying in Saundersfoot, compared with the self-catering sector. The serviced sector was also popular in Haverfordwest & St Brides Bay (41.7%), Pembroke (36.0%), St David's (32.6%), and the Inland Borderlands (Narberth, Lawrenny) (30.6%), although the majority of these figures for Haverfordwest and the Borderlands were made up of those staying in Guesthouse/B&B/Farmhouse accommodation. The self-catering sector was more popular in all other locations.

Taking each accommodation type, it can also be seen from Table 2 that Hotels were most popular in Tenby (63.2%) and to a much lesser extent Saundersfoot (18.1%). It must also be pointed out that Self-Catering/Flat/Chalet accommodation was the most popular in Saundersfoot (16.3%), followed by Tenby (15.4%), and the Inland Borderlands (12.1%), with the same pattern emerging for Static Caravans, Tenting, and Touring Caravans. Guesthouse/B&B/Farmhouse type accommodation was most popular again in Tenby (28.4%) and the Inland Borderlands (16.6%).

Table 2: Accommodation Type by Location.

	Hotel	Tent	G'house/B&B/ F'house	Hostel	Self-Catering	Static Caravan	Touring Caravan	Other (friends/ relatives)
St Davids	1.4%	4.7%	4.3%	14.3%	2.9%	1.0%	5.3%	1.3%
Fishguard	-	-	1.1%	-	0.7%	0.6%	0.5%	-
Newport/ Preseli	-	2.0%	1.8%	28.6%	1.1%	0.3%	0.5%	3.1%
HavWest/ St Brides	2.3%	2.7%	7.1%	-	3.7%	-	1.6%	11.2%
Milford Haven/Dale	-	1.3%	0.7%	14.3%	0.4%	-	-	3.1%
Inland Borderlands	0.9%	7.4%	16.6%	-	12.1%	8.7%	13.2%	9.4%
Tenby	63.2%	24.8%	28.4%	-	15.4%	29.7%	18.0%	9.4%
Saundersfoot	18.1%	16.1%	9.9%	-	16.3%	12.3%	12.7%	4.4%
Pembroke	4.7%	4.7%	7.4%	14.3%	4.0%	0.6%	3.2%	17.5%
Other	9.4%	36.3%	22.7%	28.6%	43.4%	46.8%	45.0%	40.6%
Total	**211**	**144**	**271**	**7**	**276**	**313**	**196**	**166**

When asked how they had booked their accommodation, nearly half the sample (46.8%) said they had booked ***'In Advance – direct with Proprietor'***. The second most popular methods were ***'In Advance – through an Agency'*** (12.5%) and ***'On Arrival – direct with Proprietor'*** (12.5%). Some booked ***'In Advance – through a Tourist Information Centre'*** (1.2%), ***'On Arrival – through a Tourist Information Centre'*** (0.6%), or ***'On Arrival – through an Agency'*** (0.3%), as shown in Figure 9 (page 16). A further 5.3% replied that they booked through 'Other' means, and the most popular of these were *'Through Friends or Family'*, or the *'Caravan Club'*. A total of 20.8% did not respond to the question. This suggests that more people are taking their time to plan and book their holidays and visits in advance (60.5%) and are leaving less to chance, compared with those arriving at their destination without having booked (13.4%).

A comparison between type of accommodation and method of booking, for the three predominant methods of booking – In Advance direct with a Proprietor, On Arrival direct with a Proprietor, and In Advance through an Agency, shows some differences in attitude between booking self-catering and service sector accommodation. This is seen in Table 3 (page 16), with those booking speculatively On Arrival direct with a Proprietor showing higher levels Tenting (34.4%) or staying in Guesthouses/B&B/Farmhouses (28.1%). The highest proportions booking In Advance direct with a Proprietor used Static Caravans (22.1%), Self Catering Cottages/Flats/Chalets (20.2%) and Guesthouses/B&B/Farmhouses (18.8%). Those booking In Advance through an Agency showed a preference for Self Catering Cottages/Flats/Chalets (39.2%) and Hotels (25.8%).

Figure 9: Methods of Booking Accommodation.

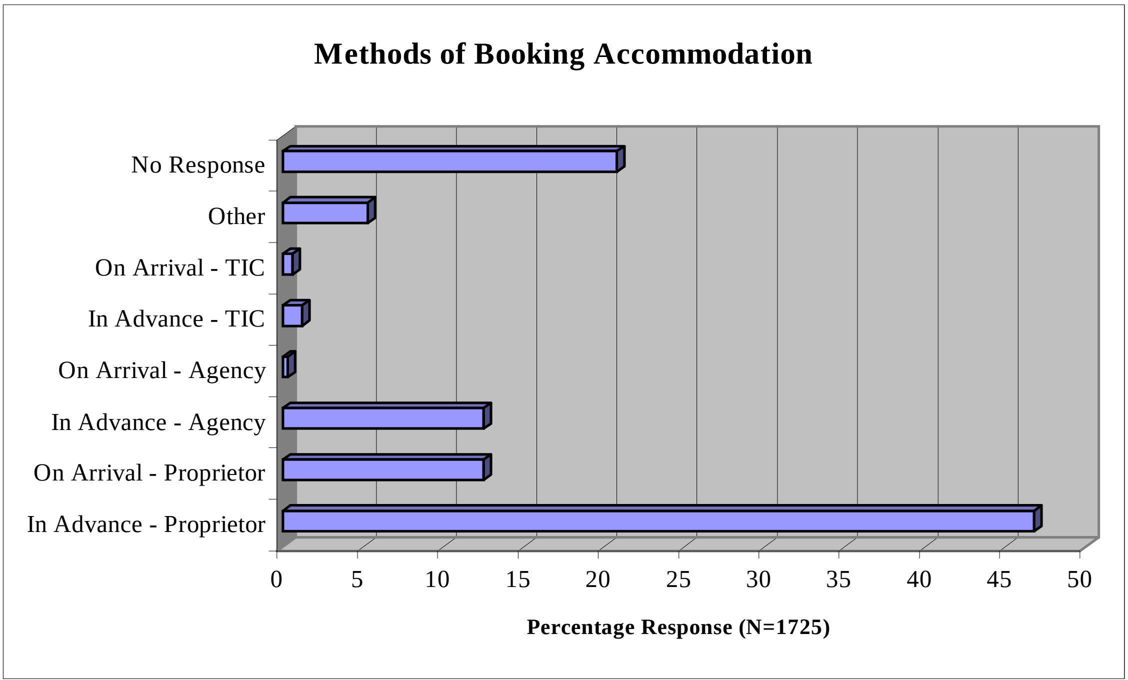


Table 3: Method of Booking by Accommodation Type.

	Hotel	Tent	Hostel	GtH/B&B/ Fmh	Self Catering	Static Caravan	Touring Caravan	Other	Total
In Advance –Proprietor (%)	15.4	6.6	0.6	18.8	20.2	22.1	14.8	1.5	**100.0**
On Arrival –Proprietor (%)	9.4	34.4	0.9	28.1	1.8	8.9	11.6	4.9	**100.0**
In Advance –Agency (%)	25.8	0.5	-	13.8	39.2	8.8	11.9	-	**100.0**

A sub sample of those interviewed by street survey (1040 respondents) were also asked, if they had booked prior to their arrival, and how much in advance had they booked their accommodation. Of this sub sample, nearly a third (31.0%) had booked ***'Between 1-3 months in advance'***. Significant proportions had booked even further in advance, with 19.5% having done this ***'Between 3-6 months in advance'***, and 19.3% having booked ***'More than 6 months in advance'***, or nearly one in five respondents in both cases. Fewer had made their reservations ***'Less than 1 month in advance'*** (16.5%), and only 13.7% had booked ***'Less than 1 week in advance'***.

When age and socio-economic groups are compared with the type of accommodation respondents preferred to use, some interesting features were highlighted. As well as reflecting the sample characteristics already established, namely that most of the sample falls into socio-economic Groups C1, B, and C2, and that the age structure is fairly representative of the general population (with the exception that the under 25s are under-represented), the results also indicate different attitudes towards the self-catering and serviced accommodation sector.

The main differences in the accommodation types used by the different socio-economic groups are shown in Table 4 below. From this it can be seen that proportionally, Groups D, A and B used the serviced sector to a slightly higher degree than Groups C1 and C2. Group D also showed a preference for Static Caravans and Self-Catering Cottages /Flats /Chalets. Group A also had a high proportion staying in Self-Catering Cottages, and also Hotels, and this tendency was also apparent among Group B. Group C2 had the highest percentage of those staying in Static Caravans and Touring Caravans, and Tenting was most popular in Group C1.

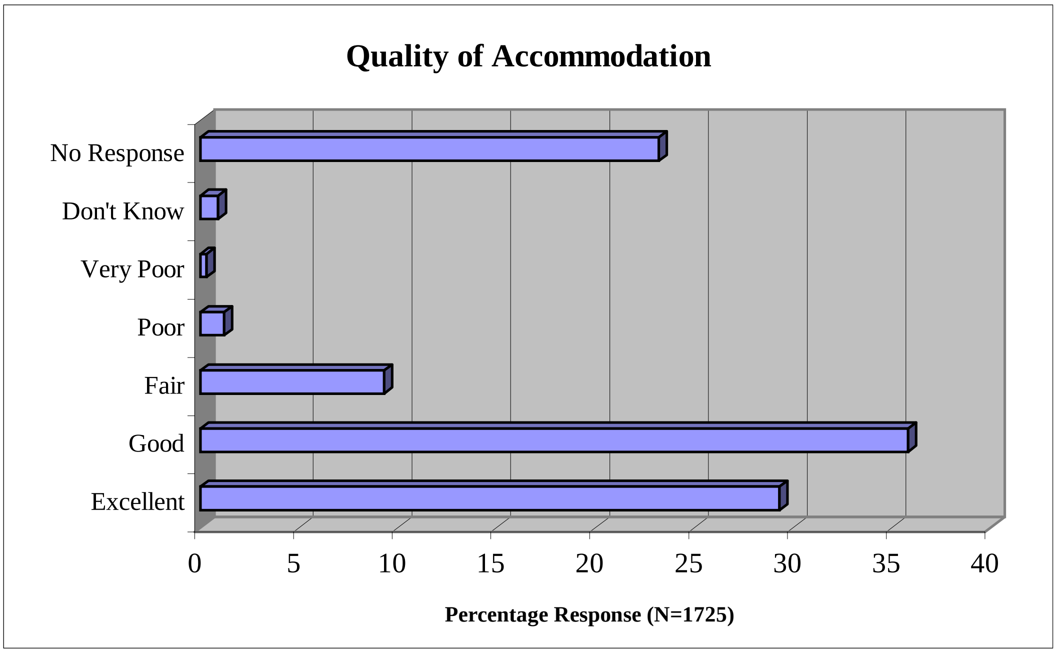
When age groups were considered by accommodation type, the most interesting features include the fact that Hotel accommodation is more popular amongst older people, and this increases with age with 6.4% of those aged 35-44 staying in Hotels compared with 31.8% of those aged 65+. As would be expected perhaps, more young people stay in tents, this is true for 36.6% of those aged 18-24, and is noticeably higher for those aged under 45. Older people show a slightly greater preference for Static Caravans as opposed to Touring Caravans.

Table 4: Accommodation Type by Socio-Economic Group.

Group→	A	B	C1	C2	D	E
Hotel	16.3%	14.6%	11.7%	9.3%	13.8%	-
Tent	6.7%	8.7%	10.8%	6.7%	7.5%	100.0%
Hostel	-	0.4%	0.8%	-	-	-
GH/B&B/FH	11.5%	13.2%	13.4%	12.9%	15.0%	-
Self Catering	27.9%	20.4%	14.7%	12.6%	15.0%	-
Static Caravan	13.5%	16.1%	16.9%	26.3%	18.8%	-
Touring Caravan	6.7%	11.2%	11.2%	15.0%	12.5%	-
Other	11.5%	10.2%	11.2%	7.2%	6.2%	-
No response	5.9%	5.2%	9.3%	10.0%	11.2%	-
TOTAL	**100.0 (104)**	**100.0 (446)**	**100.0 (537)**	**100.0 (419)**	**100.0 (80)**	**100.0 (1)**

Respondents were given five categories of quality by which to rate their accommodation, as shown in Figure 10 (page 18). Two thirds of the sample (65.1%) thought their accommodation was either ***'Excellent'*** (29.3%) or ***'Good'*** (35.8%), with 9.3% replying that they thought it was ***'Fair'***. Very little dissatisfaction was expressed, with only 1.2% saying their accommodation was ***'Poor'***, and 0.3% answering ***'Very Poor'***. A further 0.9% said they ***'Didn't Know'***, and a total of 23.3% or over one in five did not reply.

Figure 10: Quality of the Accommodation.



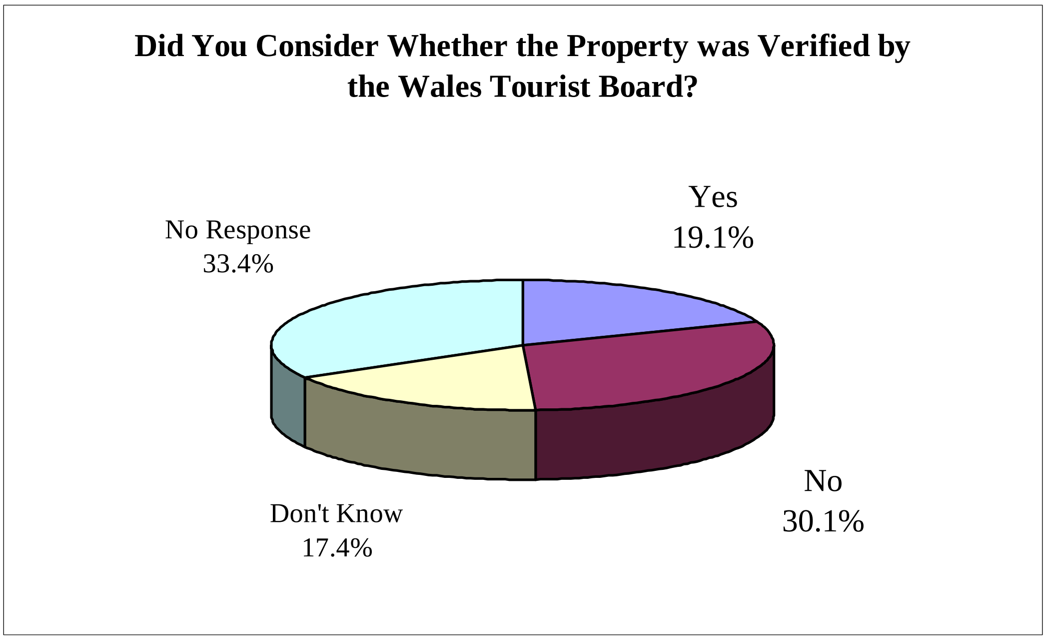
Having established that the majority of the sample felt the accommodation available to them in Pembrokeshire was of a high quality, Table 5 (page 20) presents the results of comparing that perceived standard of excellence with the type of accommodation. The most noticeable features of the table were that Touring Caravans (91.4%) were held in the highest esteem in terms of being either excellent or of good quality, followed by Guesthouse/B&B/Farmhouse accommodation (89.3%), Static Caravans (88.9%), Self-Catering Cottages/Flats/Chalets (87.4%), and Hotels (86.4%). The highest levels of dissatisfaction was expressed for Hostels (42.8%) and Tents (37.6%). Those staying in 'Other' accommodation – predominantly with family/friends thought this was also of a very high standard (84.0%), although there may be some natural bias in their opinions in this instance.

The importance of verification by the Wales Tourist Board was also explored, and respondents were asked if they had considered whether the property they had booked had been verified before making the booking. Nearly a third of the sample said No they had not considered this (30.1%), as shown in Figure 11 (page 19). Fewer said Yes (19.1%) they had considered whether the property was verified, 17.4% said they Didn't Know, and a further third of the sample (33.4%) did not respond.

Table 5: Perception of Quality by Type of Accommodation.

Quality →	Excellent	Good	Fair	Poor	Very Poor	Total
Hotel	39.8% (82)	46.6% (96)	8.7% (18)	4.4% (9)	0.5% (1)	**100.0 (206)**
Tent	17.3% (23)	45.1% (60)	33.8% (45)	2.3% (3)	1.5% (2)	**100.0 (133)**
Hostel	28.6% (2)	28.6% (2)	42.8% (3)	-	-	**100.0 (7)**
GuestH/B&B /FmHouse	45.2% (119)	44.1% (116)	9.5% (25)	0.8% (2)	0.4% (1)	**100.0 (263)**
Self-Catering	46.6% (122)	40.8% (107)	11.5% (30)	1.1% (3)	-	**100.0 (262)**
Static Caravan	39.9% (97)	49.0% (119)	10.3% (25)	0.8% (2)	-	**100.0 (243)**
Touring Caravan	26.3% (46)	65.1% (114)	7.4% (13)	0.6% (1)	0.6% (1)	**100.0 (175)**
Other	59.4% (19)	25.0% (8)	9.4% (3)	3.1% (1)	3.1% (1)	**100.0 (32)**

Figure 11: Importance of Verification by the Wales Tourist.



Given that generally respondents did not think verification of accommodation was important, significant proportions felt it was important in the case of Hotels (30.3%) as shown in Table 6 below, and to a smaller degree in the case of Guesthouse/B&B/ Farmhouse (26.2%) and Self-Catering Cottage/Flat/Chalets accommodation (26.2%). Verification seemed least important for those staying in Guesthouse/B&B/Farmhouse (49.5%) and Self-Catering Cottage/Flat/ Chalets (35.8%), Hotels (35.5%), and Tents (35.4%).

Table 6: Importance of Verification by Accommodation Type.

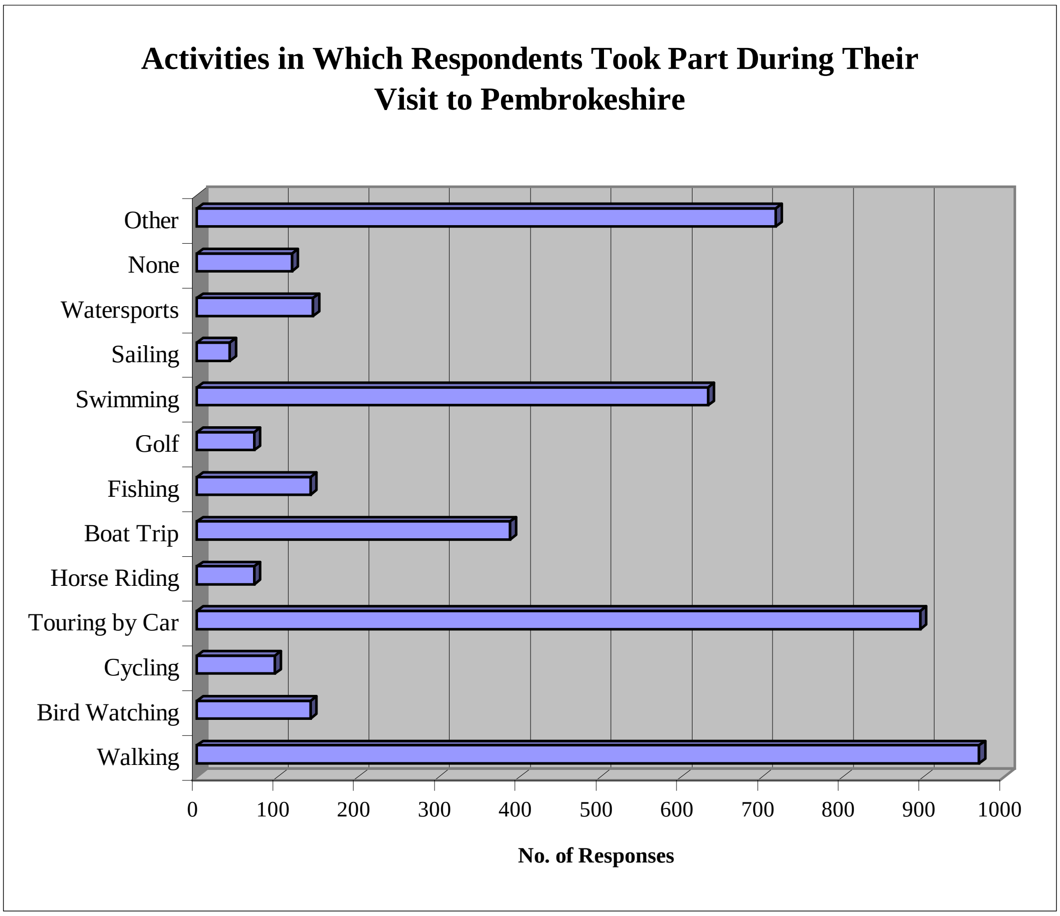
	Yes	No	Don't Know	No Reply	Total
Hotel	30.3% (64)	35.6% (75)	15.6% (33)	18.5% (39)	**100.0 (211)**
Tent	11.8% (17)	35.4% (51)	30.6% (44)	22.2% (32)	**100.0 (144)**
Hostel	28.6% (2)	28.6% (2)	14.2% (1)	28.6% (2)	**100.0 (7)**
GuestHs/B&B/ FarmHs	26.2% (71)	49.5% (134)	14.0% (38)	10.3% (28)	**100.0 (271)**
Self Catering	25.0% (69)	35.8% (99)	23.6% (65)	15.6% (43)	**100.0 (276)**
Static Caravan	21.4% (67)	27.8% (87)	21.4% (67)	29.4% (92)	**100.0 (313)**
Touring Caravan	19.9% (39)	29.1% (57)	24.0% (47)	27.0% (53)	**100.0 (196)**
Other	1.8% (3)	12.0% (20)	4.2% (7)	82.0% (136)	**100.0 (166)**

4. ACTIVITIES AND ATTRACTIONS

In this section of the questionnaire respondents were asked about the attractions and activities in which they took part or visited during their stay in Pembrokeshire, as well as their use of Tourist Information Centres in the area, and their expenditure both on accommodation and on other goods and services.

The most popular activities in which people in the sample participated were ***'Walking'*** (969 responses), ***'Touring by Car'*** (896), ***'Swimming'*** (633), and ***'Boat Trips'*** (388). These results are illustrated in Figure 12 (page 21). Several, though fewer by comparison, took part in ***'Watersports'*** (144), ***'Fishing'*** (141), ***'Bird Watching'*** (141), ***'Cycling'*** (97), ***'Horse Riding'*** (71), ***'Golfing'*** (71), and ***'Sailing'*** (41). A total of 118 said they did not take part in any of the listed activities, and several mentioned ***'Other'*** activities. The most popular of these were *'Beaches'* (412 responses), *'Sightseeing'* (98), *'Relaxing'* (88), *'Shopping'* (14), *'Sunbathing'* (11), *'Painting'* (6), and *'Climbing'* (4).

Figure 12: Activities in Which Respondents Participated.



'Walking', ***'Touring by Car'***, ***'Swimming'***, and ***'Boat Trips'*** were the top four activities in each age group of the sample population, and most of the activities were popular across all age groups. The small numbers of under 25s in the sample means it is not possible to expand meaningfully on the trends in these two age groups. Appendix 1 shows the cross tabulated data of activities by age, and the most important features include the higher levels among the older age cohorts (45 and over) of those not engaged in any activities, compared with the higher proportions of participation in ***'Watersports'***, ***Cycling'***, and ***'Horse Riding'*** among those aged 25-44. Fewer aged 45 and over took part in ***'Swimming'***, but ***'Bird Watching'*** and ***'Golf'*** were popular. The most noticeable differences between the two largest age groups, 35-44 and 45-55, were the greater popularity of ***'Swimming'*** in particular, and also ***'Touring by Car'***, and ***'Boat Trips'*** among the younger age group 35-44, while ***'Walking'*** appealed slightly more to those aged 45-54.

A comparison of the popularity of activities across the socio-economic groups showed that the four key activities were popular across all of the Groups, and Appendix 2 shows these results in detail. As well as the four main activities, Group A were also drawn to ***'Cycling'*** and ***'Watersports'***, while ***'Golfing'*** was most popular in Group B. Group C1 also enjoyed ***'Watersports'*** along with ***'Bird Watching'***, and both Groups C2 and D enjoyed ***'Fishing'*** and also ***'Watersports'***.

Walking was explored in more detail by asking respondents who might spend time walking during their visit where they might walk, how often, and how far. The most popular footpath to walk, of the six listed in the questionnaire, and by far the most popular, was the ***'Pembrokeshire Coast National Park'*** (718 responses), with very few by comparison to this walking the other footpaths. A total of 52 responses said they walked the ***'Landsker Borderlands Trail'***, and 38 said they walked the ***'Preseli Hills'***. Smaller numbers walked the ***'South of Landsker Trail'*** (18), ***'Gwaun Valley'*** (12), and ***'Daugleddau/Milford Haven Waterway'*** (12). 'Other' places walked tended to be the surrounding area generally, beaches in the area, and included centres such as Tenby, Bosherston Lakes, and St David's.

When asked how often they went walking while staying in the area, the highest percentage said ***'Frequently – (every day)'*** (19.4%), followed by ***'Often – (every other day)'*** (12.3%), ***'Quite often'*** (7.9%), and ***'Infrequently'*** (6.3%). Over half the sample (54.1%) did not reply to this question, as shown in Table 7.

Table 7: Respondents' Use of Footpaths During Their Visits.

Frequency	Responses (%)
Frequently – (every day)	334 (19.4%)
Often – (every other day)	213 (12.3%)
Quite Often	136 (7.9%)
Infrequently	108 (6.3%)
No Response	934 (54.1%)

Of those who responded when asked how far they walked each day (N=829), the largest proportion walked ***'Up to 3 miles'*** (57.9% or 480 responses), with over a quarter (26.7%) walking ***'4-6 miles'***. Far fewer walked longer distances, with 8.9% walking ***'7-9 miles'***, 5.3% walking ***'10-12 miles'***, and only 1.2% (10 responses) walked ***'13 miles or more'***.

Respondents were given a list of twenty two attractions in the area, and asked to indicate which they had or would be visiting during their stay. The most popular included ***'Castles'*** (846 responses), ***'Pembrokeshire Islands'*** (449), ***'Bosherston Lilly Ponds'*** (436), ***'Oakwood'*** (351), ***'Farm Based Attractions'*** (345), ***'Caldey Island'*** (340), ***'Spiritual Heritage Attractions'*** (324), ***'Art and Craft Galleries'*** (321), and ***'Country Parks'*** (318). Many also visited ***'Gardens and Garden Centres'*** (256), ***'Swimming Pools and Leisure Centres'*** (180), and ***'Local Food Producers'*** (105). As shown in Table 8 (page 23), the remaining attractions listed were less popular, including ***'Skomer Island'*** (64), ***'Ramsey Island'*** (39), ***'Ocean Lab'*** (38), ***'Castell Henllys'*** (35), ***'Skokholm'*** (10), and ***'Grassholm'*** (5). Many respondents (497) also mentioned 'Other' attractions in the area, and the most popular of these by far was *'Beaches'* (287 responses). Other places included *'Tenby'* (33), *'Dinosaur Park (16)/Heatherton (12)'*, and *'Saundersfoot'* (5).

Table 8: Attractions in Pembrokeshire Visited by Respondents.

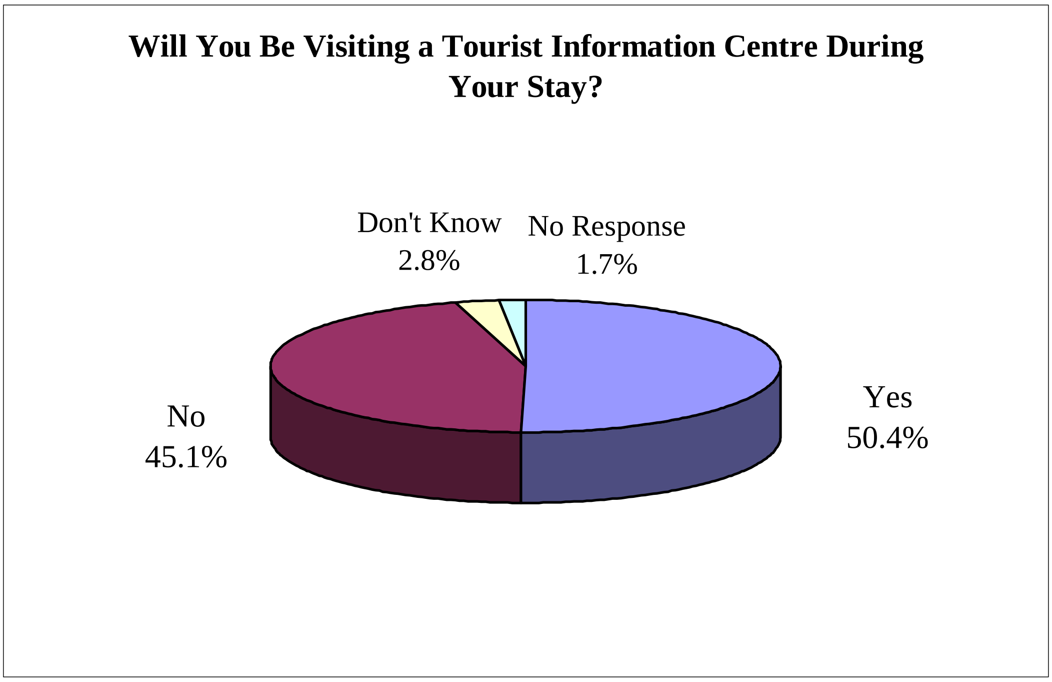
Attraction	No. of Responses	Percentage (N=1725)
Spiritual Heritage Attractions	324	18.8
Castles	846	49.0
Pembrokeshire Islands	449	26.0
Caldy	340	19.7
Skomer	64	3.7
Skokholm	10	0.6
Grassholm	5	0.3
Ramsey	39	2.3
Castell Henllys	35	2.0
Oakwood	351	20.3
Farm Based Attractions	345	20.0
Bosherston Lilly Ponds	436	25.3
Country Parks	318	18.4
Ocean Lab	38	2.2
Gardens/Garden Centres	256	14.8
Art & Craft Galleries	321	18.6
Swimming Pools/Leisure Centres	180	10.4
Local Food Producers	105	6.1
None	202	11.7
Don't Know	95	5.5
Other	497	28.8

When these attractions are analysed by age structure and socio-economic group, the results tended to show a fairly even spread of interest across these groups in keeping with the most popular attractions in the sample pattern generally. The results are shown in detail in Appendices 3 and 4, and it is worth noting some trends and differences that were apparent. Interest in ***'Spiritual Heritage Attractions'*** increased with age, this was also true of ***'Art and Craft Galleries'***, and ***'Gardens and Garden Centres'*** were particularly popular among those aged 55+. The younger age groups of between 25-34 showed an interest in ***'Farm Based Attraction'*** and ***'Oakwood'.*** The 45-54 age group were interested in ***'Spiritual Heritage Attractions'***, and ***'Art and Craft Galleries'***, while the 35-44 year olds tended more towards ***'Caldey Island'***, ***'Country Parks'***, and ***'Art and Craft Galleries'***.

By socio-economic group, again the most popular attraction held across the groups, with a particular interest in ***'Bosherston Lilly Ponds'*** among Group A along with ***'Country Parks'***. Those in Group B were interested in ***'Spiritual Heritage Attractions'***, ***'Caldey Islands'***, and ***'Art and Craft Galleries'***, and those in Group C1 were attracted to ***'Country Parks'*** and ***'Swimming and Leisure Centres'***. Those in Group C2 showed an interest in ***Caldey Island'*** and in ***Farm Based Attractions'***, and Group D were particularly drawn to ***'Oakwood'*** and also to ***'Caldey Island'***.

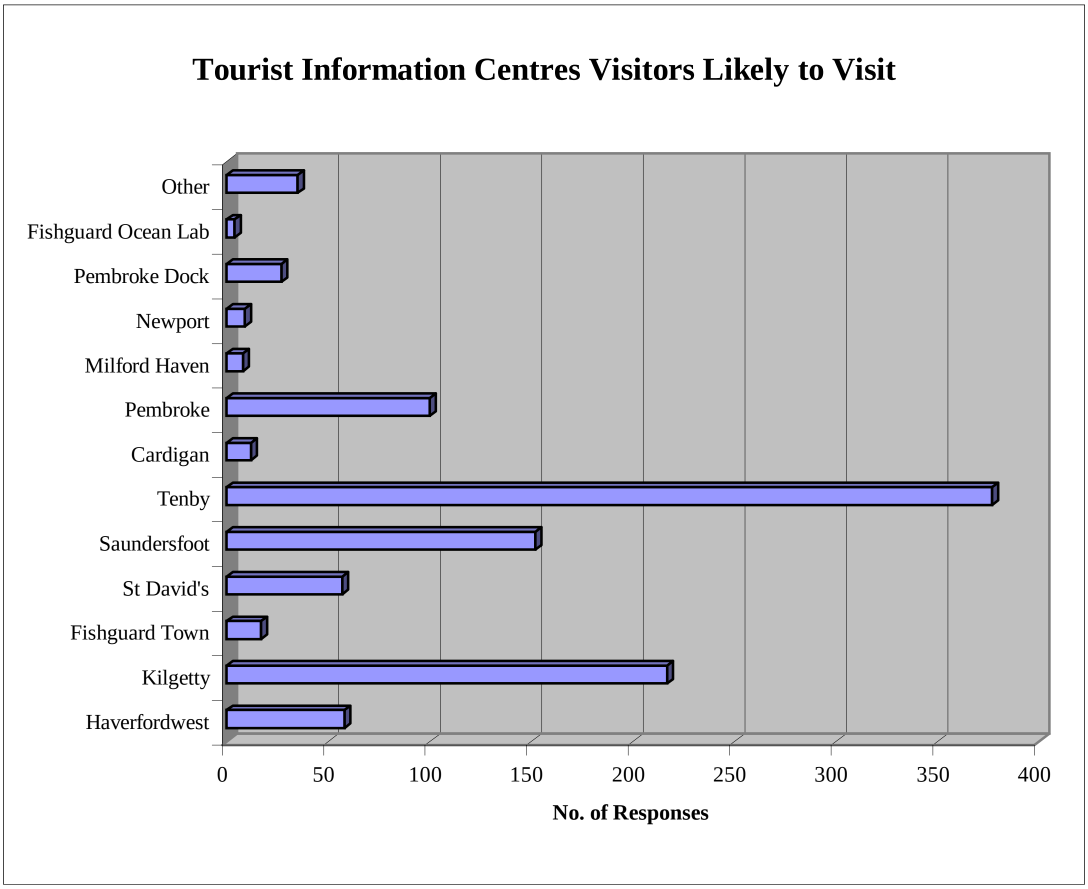
The next sequence of questions explored the use made by visitors of local Tourist Information Centres. When asked if they, or any members of their party, had or would be visiting a Tourist Information Centre during their stay, half the sample (50.4%) said Yes they would, 45.1% said No they would not, 2.8% said they Didn't Know, and the remaining 2.8% did not respond. These results are illustrated clearly in Figure 13.

Figure 13: Visiting Tourist Information Centres.



Those who thought they might be visiting a TIC were asked to indicate from a list of thirteen which Centres they might be. The most likely Centres to be visited were ***'Tenby'*** (377 responses), ***'Kilgetty'*** (217), ***'Saundersfoot'*** (152), and ***'Pembroke'*** (100). As shown in Figure 14 (page 25), some selected ***'Haverfordwest'*** (58), ***'St David's'*** (57), ***'Pembroke Dock'*** (27), ***'Fishguard Town'*** (17), and ***Cardigan'*** (12). Only very small numbers visited the remaining three Tourist Information Centres on the list, and of those who suggested 'Other' TIC locations *'Carmarthen'* (7 responses), and *'Narberth'* (2) were the most popular. Those who said they would not visit a Tourist Information Centre while staying in the area were also asked why, and the majority answered that this was because they either *'Knew the area well'* (279 responses), or had picked up *'Leaflets/Information at their accommodation/at other sites' (188).*

Figure 14: Tourist Information Centres Most Likely to be Visited.



Over half of the respondents aged between 25-54 intended to visit or had visited a Tourist Information Centre, with the highest percentage either visited or intending to aged 35-44 (59.7%). Those least likely to visit TICs were older, with the higher percentages replying No they had not or did not intend to use TICs aged 55 and over, as shown in Table 9 (page 26). This was also true of the 18-24 age group, although with such a small sample in this age group it would be misleading to generalise from such figures. By socio-economic group, TICs were used or likely to be used most by those in Group B and C1, and least likely to be used by those in Group D, as shown in Table 10 (page 26), but the margins of difference between those who would or would not use TICs are so small here as to suggest that socio-economic grouping is far less important than age in influencing this trend.

Table 9: Use of Tourist Information Centres by Age Group.

Age →	<18	18-24	25-34	35-44	45-54	55-64	65+	Total
Yes	3	16	138	309	202	127	66	861
(%)	(21.4)	(39.0)	(52.3)	(60.1)	(53.4)	(49.4)	(31.3)	(51.3)
No	11	25	112	193	167	124	140	772
(%)	(78.6)	(61.0)	(42.4)	(37.5)	(44.2)	(49.3)	(66.4)	(46.0)
Don't Know	0	0	14	12	9	6	5	46
(%)	-	-	(5.3)	(2.4)	(2.4)	(2.3)	(2.3)	(2.7)
Total	14	41	264	514	378	257	211	1679

Table 10: Use of Tourist Information Centres by Socio-Economic Group.

	Group A	Group B	Group C1	Group C2	Group D	Group E
Yes	52	236	297	199	37	1
(%)	(50.5)	(54.0)	(55.6)	(47.7)	(47.4)	(100.0)
No	49	190	216	204	41	0
(%)	(47.6)	(43.5)	(40.4)	(48.9)	(52.6)	-
Don't Know	2	11	21	14	0	0
(%)	(1.9)	(2.5)	(4.0)	(3.4)	-	-
Total	103	437	534	417	78	1

Respondents were asked about their average daily spend, per person during their visit, firstly on 'Accommodation', and secondly on 'Other' things (see Table 11 below). In the case of 'Accommodation', 22.7% were spending ***'Under £10'*** per person per day, and 20.6% were spending ***'£11-£20'***. Far fewer (15.1%) were spending ***'£21-£40'*** on 'Accommodation', and only 4.0% were spending ***'£41 and over'***. While in the case of 'Other' expenditure, over forty percent of the sample (43.2%) were spending ***'£11-£20',*** and over a quarter (28.3%) were spending ***'Under £10'***; and again far fewer were spending at a higher level, with16.8% spending ***'£21-£40'***, and only 3.3% spending ***'£41 and over'*** on 'Other' items.

Table 11: Average Daily Spend Per Person Per Day On Accommodation and Other Goods and Services.

Amount/day/person	Accommodation		Other	Goods
	Number	Percent	Number	Percent
Under £10	391	22.7%	488	28.3%
£11-£20	355	20.6%	746	43.2%
£21-£40	261	15.1%	289	16.8%
£41 and Over	69	4.0%	57	3.3%
No Response	649	37.6%	145	8.4%

Expenditure was also explored in more detail by analysing expenditure on accommodation and goods by age and socio-economic group to see what this revealed, and also by looking at expenditure relative to the type of accommodation in which people were staying, as shown in the following tables.

Table 12 (below) shows a comparison of expenditure both on accommodation and goods by age structure. Interestingly, expenditure on Accommodation increases with age, with higher percentages among those aged 45 and over spending in the ***'£21-£40'*** and ***'£41 and over'*** brackets. In the younger 18-24 age group, a very high proportion was spending ***'under £10''*** while the 24-34 age group had the highest proportion spending ***'£11-£20'***. On the other hand, a different pattern emerged, though less conclusive, in terms of spending on Other Goods and Services by age. A higher proportion of those aged 65+ were spending ***'under £10'***, and this was also high for the 18-24 age group. This decreased as the amount of money being spent increased. Those aged 25-34 and 45-54 showed the highest proportions spending ***'£21-40'*** on Other Goods and Services.

Table 12: Expenditure on Accommodation and Goods by Age Group.

	Under 18	18-24	25-34	35-44	45-54	55-64	65+
Accommodation							
No Response	4	8	72	176	144	113	112
	(25.0)	(19.5)	(27.3)	(34.0)	(37.5)	(42.8)	(53.1)
<£10	7	21	71	129	72	54	36
	(43.8)	(51.2)	(26.9)	(24.9)	(18.7)	(20.5)	(17.1)
£11-£20	3	5	69	128	79	49	19
	(18.8)	(12.2)	(26.1)	(24.7)	(20.6)	(18.6)	(9.0)
£21-£40	1	4	44	68	68	37	37
	(6.2)	(9.8)	(16.7)	(13.1)	(17.7)	(14.0)	(17.5)
£41+	1	3	8	17	21	11	7
	(6.2)	(7.3)	(3.0)	(3.3)	(5.5)	(4.1)	(3.3)
Total	16	41	264	518	384	264	211
	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)
Goods	**<18**	**18-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65+**
No Response	0	1	19	29	35	25	21
	-	(2.4)	(7.2)	(5.6)	(9.1)	(9.5)	(9.9)
<£10	8	17	51	167	98	61	82
	(50.0)	(41.5)	(19.3)	(32.2)	(25.5)	(23.1)	(38.9)
£11-£20	5	17	127	225	162	126	81
	(31.3)	(41.5)	(48.1)	(43.4)	(42.2)	(47.7)	(38.4)
£21-£40	2	4	58	79	83	39	20
	(12.5)	(9.8)	(22.0)	(15.3)	(21.6)	(14.8)	(9.5)
£41+	1	2	9	18	6	13	7
	(6.2)	(4.8)	(3.4)	(3.5)	(1.6)	(4.9)	(3.3)
Total	16	41	264	518	384	264	211
	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)

Table 13: Expenditure on Accommodation and Goods by Socio-Economic Group.

	Group A	Group B	Group C1	Group C2	Group D	Group E
Accommodation						
No Response	38	162	194	173	37	1
	(36.5)	(36.3)	(36.1)	(41.3)	(46.3)	(100.0)
<£10	20	82	139	116	19	-
	(19.2)	(18.4)	(25.9)	(27.7)	(23.7)	
£11-£20	16	94	114	82	19	-
	(15.5)	(21.1)	(21.2)	(19.6)	(23.7)	
£21-£40	15	86	76	38	4	-
	(14.4)	(19.3)	(14.2)	(9.1)	(5.0)	
£41+	15	22	14	10	1	-
	(14.4)	(4.9)	(2.6)	(2.3)	(1.3)	
Total	104	446	537	419	80	1
	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)

When expenditure on Accommodation was analysed by socio-economic groups, as shown above in Table 13, the most noticeable features included the highest proportion spending ***'£41 and over'*** per person per day on Accommodation was found in Group A, while the highest proportion spending ***'under £10'*** was shown to be in Groups C2 and C1. More in Group B were spending ***'£21-£40',*** and the highest proportion spending ***'£11-£20'*** on accommodation were in Group D.

The amount of money spent per person per day on Accommodation by type of accommodation was also an interesting comparison, as was the difference between this and money spent on Other Goods. Table 14 (page 29) shows these results. Those staying in Hotels were spending larger amounts in greater numbers on Accommodation and on Other Goods, with nearly half this group (47.9%) spending ***'£21-£40'*** on their Hotel room per person per day. This group also showed the highest proportion spending ***'£41 or over'*** on Accommodation (15.6%). High proportions staying in Tents were spending ***'under £10'*** (72.9%) on Accommodation, and this was also true of those in Touring Caravans (55.1%). Those spending least on Other Goods included those staying in Tents, with 37.5% spending ***'under £10'***, and those in Static Caravans (30.4%). Those staying in Guesthouse/B&B/ Farmhouse accommodation were spending in high numbers in the ***'£11-£20'*** bracket on their room (57.2%), and a quarter of this group (25.8%) were spending ***'£21-£40'***. High spending on Other Goods was found among those staying in Touring and Static Caravans, with 48.0% and 47.9%, respectively, spending ***'£11-£21'***. This figure was highest among those staying with Family and Friends, as would be expected.

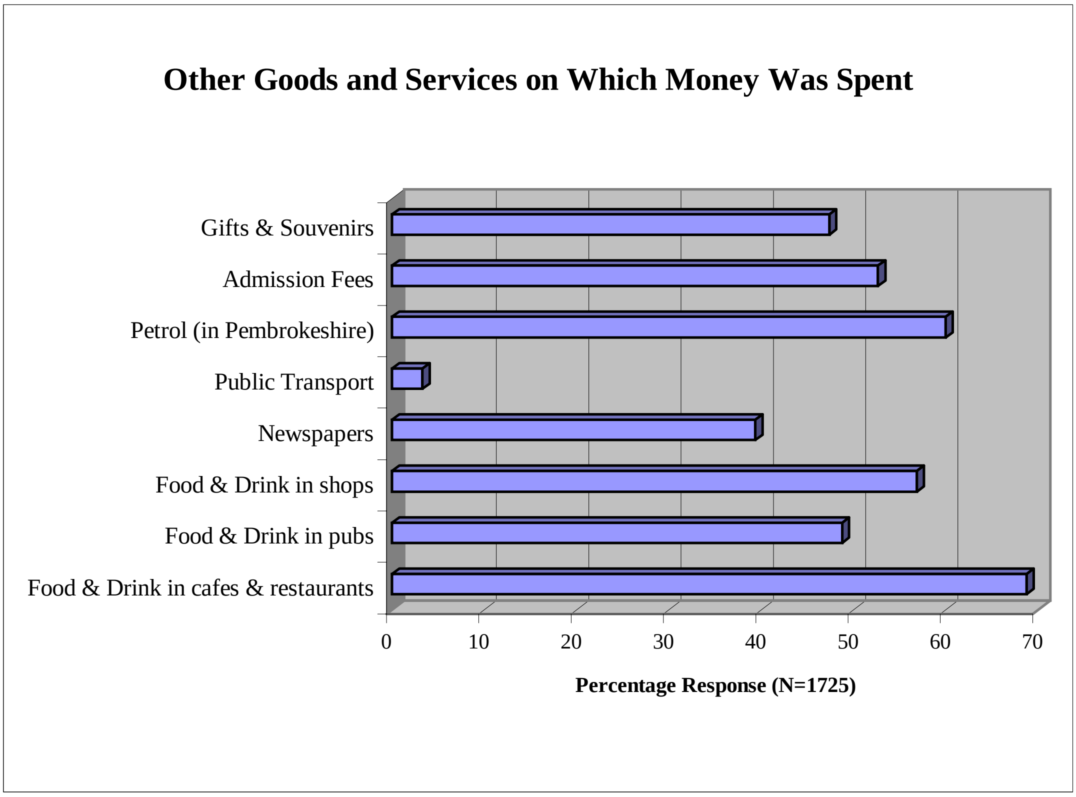
Table 14: Expenditure on Accommodation and Goods by Accommodation Type.

	Hotel	Tent	GH/B&B FH	Hostel	Self Catering	Static Caravan	Touring Caravan	Others/ Family
Accommodation								
No Response	63	16	27	2	116	172	40	100
	(29.9)	(11.1)	(10.0)	(28.6)	(42.0)	(55.0)	(20.4)	(60.2)
<£10	0	105	7	3	34	47	108	56
	-	(72.9)	(2.6)	(42.8)	(12.3)	(15.0)	(55.1)	(33.8)
£11-£20	14	19	155	2	60	59	45	4
	(6.6)	(13.2)	(57.2)	(28.6)	(21.7)	(18.8)	(23.0)	(2.4)
£21-£40	101	2	70	-	51	29	3	4
	(47.9)	(1.4)	(25.8)		(18.6)	(9.3)	(1.5)	(2.4)
£41+	33	2	12	-	15	6	-	2
	(15.6)	(1.4)	(4.4)		(5.4)	(1.9)		(1.2)
Total	211	144	271	7	276	313	196	166
	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)
Goods	**Hotel**	**Tent**	**GH/B&B FH**	**Hostel**	**Self Catering**	**Static Caravan**	**Touring Caravan**	**Others/ Family**
No Response	27	8	32	0	21	22	17	8
	(12.8)	(5.6)	(11.8)	-	(7.6)	(7.0)	(8.7)	(4.8)
<£10	50	54	42	5	67	95	57	54
	(23.7)	(37.5)	(15.5)	(71.4)	(24.3)	(30.4)	(29.1)	(32.5)
£11-£20	69	56	126	2	113	150	94	81
	(32.7)	(38.9)	(46.5)	(28.6)	(41.0)	(47.9)	(48.0)	(48.9)
£21-£40	48	24	62	0	60	44	25	18
	(22.7)	(16.7)	(22.9)	-	(21.7)	(14.1)	(12.7)	(10.8)
£41+	17	2	9	0	15	2	3	5
	(8.1)	(1.3)	(3.3)	-	(5.4)	(0.6)	(1.5)	(3.0)
Total	211	144	271	7	276	313	196	166
	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)	(100.0)

In relation to other goods and services, respondents were asked on what they spent their money, and given a list of eight categories of goods and services to select. The most popular of these, as shown in Figure 15 (page 30), were ***'Food & Drink in caf□s & restaurants'*** (68.8%), ***'Petrol (in Pembrokeshire)'*** (60.0%), ***'Food & Drink in shops'*** (56.9%), and ***'Admission Fees'*** (52.7%). Fewer spent their money on ***'Food & Drink in pubs'*** (48.8%), ***'Gifts & Souvenirs'*** (47.4%), and ***'Newspapers'*** (39.4%), and only 3.3% spent any on ***'Public Transport'***. Additional items on which money was spent included *'Clothes'*, *'Boat Trips'*, *'Parking'*, and *'Shopping'*. The money spent on other goods and services was then analysed against accommodation type, and the results are shown in detail in Appendix 5. More of those staying in Touring Caravans, Hotels, Static Caravans, and Self Catering accommodation were spending money on ***'Food & Drink in caf□s and restaurants'***. Fewer staying in Tents were doing this; these instead were spending more often on ***'Food & Drink in shops, and pubs'***. This was true of all the self-catering options. More of those staying in Self-Catering Cottages or Touring Caravans were buying ***'Newspapers'***, with those staying in Hotels doing this least often. More of those staying in

Self-Catering Cottages were also spending on ***'Public Transport'***. Those spending most frequently on ***'Petrol – in Pembrokeshire'*** included those in Touring Caravans, Static Caravans, and Tents. Both ***'Admission Fees'*** and ***'Gifts and Souvenirs'*** were most popular among those in Touring Caravans and Self-Catering Cottages/Flats/Chalets.

Figure 15: Other Goods and Services on Which Money Was Spent.



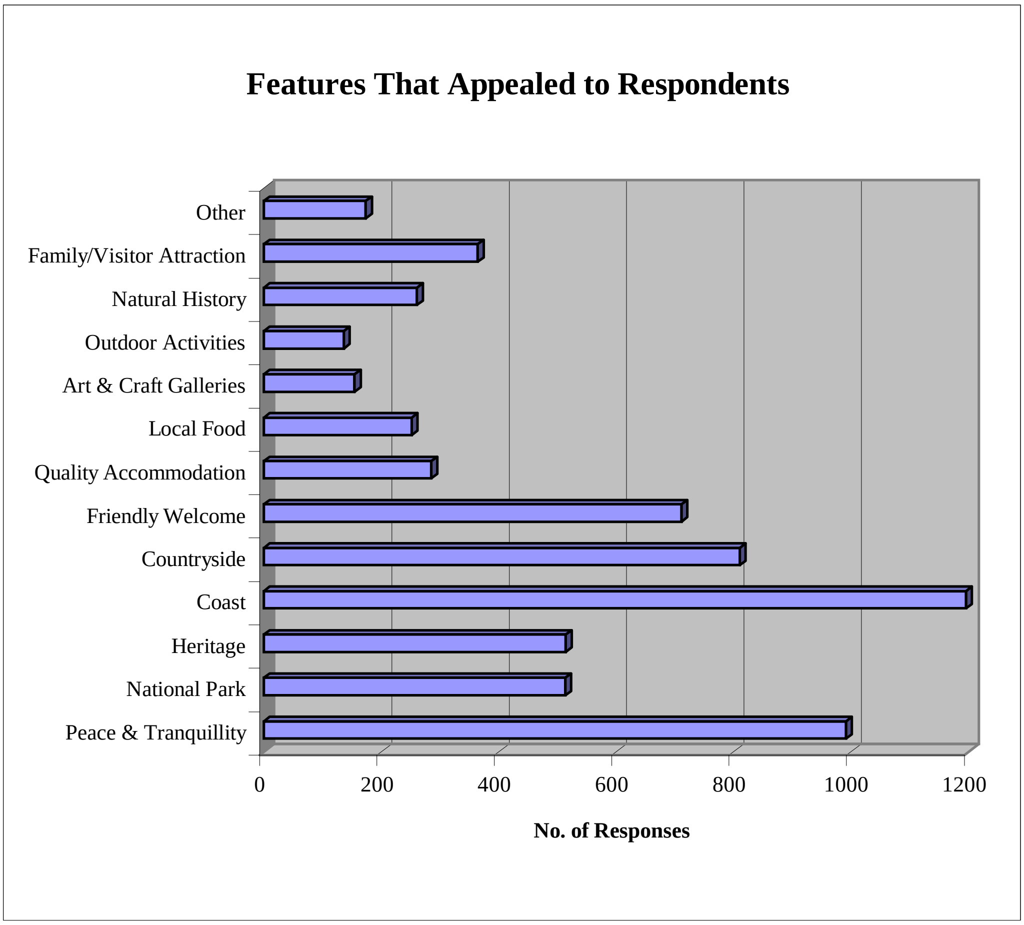
5: FUTURE PLANS AND POSSIBLE IMPROVEMENTS

In this final section relating to the questionnaire itself, visitors' attitudes to the area were investigated, and respondents were asked which features in the area appealed to them most, what they felt could be improved, and what future plans they had to visit the area again.

A list of twelve features of the area was given to respondents, and they were asked which appealed to them and their party. The most popular feature was the ***'Coast'*** (1195 responses), followed by ***'Peace and Tranquillity'*** (991), the ***'Countryside'*** (810), and a ***'Friendly Welcome'*** (711). Fewer favoured the area's ***'Heritage'*** (514), or the ***'National Park'*** (513), ***'Family/Visitor Attractions'*** (364), ***'Quality Accommodation'*** (285), ***'Natural History'*** (261), or ***'Local Food'*** (252). Less popular, as shown in Figure 16 (page

31), were ***'Art & Craft Galleries'*** (155), and ***'Outdoor Activities'*** (136). *'Other'* features mentioned included the area's '*Beaches'* (38 responses), and *'Cleanliness' (28).*

Figure 16: Features of the Area that Appealed to Respondents.



The majority of respondents across all age groups and socio-economic groups agreed on the five most popular features that appealed to them, and these have already been identified. The tables holding the data for a comparison of features which appealed by age and socio-economic groups are shown in Appendix 6 and 7. The most interesting aspect of a comparison by age group seen in Appendix 6 is the increasing importance of ***'Peace and Tranquillity'***, a ***'Friendly Welcome'***, ***'Quality Accommodation'***, and ***'Local Food'*** with increasing age – especially among those aged 45 and over, and particularly in the case of ***'Peace and Tranquillity'*** among those aged 55+. The ***'Coast'*** and ***'Countryside'*** were more popular among younger visitors, especially those aged 18-24, while ***'Outdoor Activities'*** were favoured by those aged 25-44, and ***'Family Attractions'*** were popular among those aged 35-44.

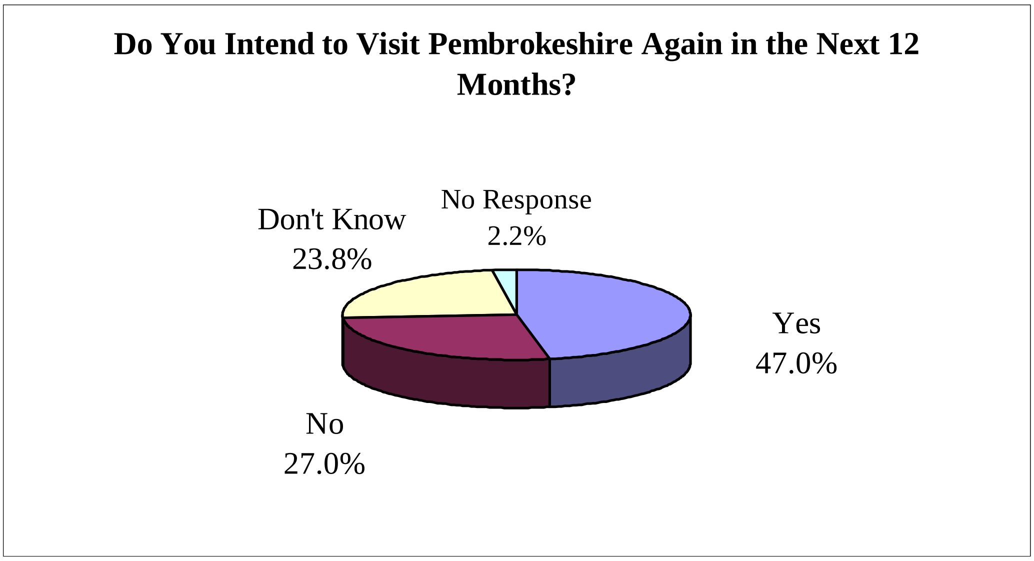
By socio-economic group, it is worth noting that Group A seemed to answer this question with greater enthusiasm, and a slightly higher response rate than the other groups. Hence, as shown in the data in Appendix 7, the have higher percentage responses generally to most of the features. This is particularly noticeable in the case of ***'The Coast'*** (74.0%), and ***'Peace and Tranquillity'*** (66.3%). ***'The Coast'*** was also popular among group C1 and Group B, while a ***'Friendly Welcome'*** was important to Group B and C2. ***'Quality Accommodation'*** was proportionally important to many in Group D.

Respondents were then asked what features of the area they felt could be improved, and invited to make suggestions and comments. The most popular response was undoubtedly *'None'* (673 responses). Other comments concerned with more problematic aspects of the area included *'Toilets'* (46), *'Parking'* (45), *'Sign Posting'* (24), *'Traffic'* (19), *'Unclean Beaches'* (17), *'Dog Mess'* (15), *Public Transport'* (13), *'Litter Bins'* (10), and *'Unhelpful Tourist Information Centres'* (7).

Nearly half the sample (47.0%) said they intended to visit Pembrokeshire again within the next 12 months, over a quarter (27.0%) said No they did not, 23.8% answered 'Don't Know', and only 2.2% did not respond, as shown below in Figure 17. The largest percentage of those who intended to visit again within the next 12 months said they would return for a ***'Long Holiday (4 nights or more)'*** (59.6%). Over a quarter (28.1%) said they would come for a ***'Short Break (1-3 nights)'*** , and 10.9% intended to come back on ***'Day Trips – from home'***. Only 0.2% intended to return for ***'Day Trips – from holiday'***, and 1.2% replied *'Other'*, with Business being the main reason.

The most popular types of accommodation they hoped to be using were ***'Static Caravans'*** (179 responses), ***'Self Catering Cottage/Flat/Chalet'*** (119), and ***'Guesthouse/ B&B/ Farmhouse'*** accommodation (99). Fewer thought they would stay in ***'Hotels'*** (77), ***'Touring Caravans'*** (72), or ***'Tents'*** (71). Only 2 thought they would stay in ***'Hostels'***. Several said they would use *'Other'* types of accommodation, and in most cases this meant staying with *'Family'* (46 responses), or *'Friends'* (32). Some said they would be staying in *'Their own property'* (12), and others answered *Campervans/Motorhomes'* (9).

Figure 17: Intention to Visit Pembrokeshire Again Within the Next 12 Months.



Those who had replied they would not be visiting Pembrokeshire in the next 12 months were asked why not. The majority who replied made positive comments and very few complaints were given as reasons for not returning to the area. A large number said they would *'Try somewhere else'* next year (171 responses), that it was *'Too Far'* to return next year (50), but that they *'Will Come Again'* (47). Others had *'No Time'* to return next year (33), and a few thought it was *'Too expensive'* (5).

6: CHANGES OVER TIME

This section of the report specifically compares the results of this 1999 Visitor Survey with the results of the first and second such surveys carried out in 1997 and 1998. These three sets of results have been compared, and the main differences and changes over time – a relatively short time period of two years - are presented and discussed here, section by section. It must be stated, however, that it is difficult to predict whether some of the changes over time described here will develop into trends or are due more to incidental differences.

6a: Demographic Characteristics

The characteristics of all three samples were quite similar, with the younger age groups (under 25) under-represented in all three surveys. Under 25s ranged slightly from making up 4.0% of the 1997 sample, 2.9% in 1998, and 3.3% in 1999. More significant has been the increase in these three years in the proportion of older people represented. Those aged 55-64 increased from 22.7% in 1997 to 27.9% in 1999, and the same trend has occurred among those age 65+, with these making up 8.6% of the 1997 sample, 11.3% in 1998, and 12.4% in 1999.

In terms of the origin of visitors to the area the percentages were again similar. Visitors from Europe made up 3.1% in 1998 and 1999, having decreased slightly from 4.6% in 1997. Visitors from Scotland increased slightly from 1.7% in 1997 to 2.3% in 1998, but then decreased again in 1999 to 1.7%. More significant has been an increase in the percentage of visitors from Wales to the area, with 18.7% making up the 1998 sample compared with 23.5% in 1999.

The socio-economic structure of the sample also shows some changes. The greatest difference between 1997 and 1998 was the decrease in Group C2 from 35.4% to 28.0%, and this continued to decrease to 24.3% in 1999. The largest changes, however, are in the decrease in Group C1 from 38.3% in 1998 to 31.1% in 1999, and the increase in Group B from 17.4% in 1998 to 25.9% in 1999. Also worth noting is the difference in comparison by age with socio-economic group. Groups A, C1 and C2 made up larger percentages of those aged 55+ in 1999, with C1 increasing from 22.6% aged 55+ n 1998 to 31.7% in 1999, while Group D showed a significant decrease in this age group from 58.9% in 1998 to 35.0% in 1999.

Similar proportions were home owners in all three samples, with a small decrease from 88.9% in 1998 to 84.3% in 1999. The proportion of those with access to the Internet at work rose slightly from 23.5% in 1998 to 26.6% in 1999, while access to this at home continued to increase annually, from 9.4% in 1997, to 20.0% in 1998, and 31.2% in 1999.

6b: Visiting Pembrokeshire

Similar proportions in the 1999 sample were on Holiday (92.0%) compared with 1998 (93.0%), and this was higher than in 1997 (86.6%). The same proportion were visiting Family and Friends in 1999 (4.3%) and 1998 (4.0%), and this was much lower than the 12.4% visiting family and friends in 1997. It was a main holiday for similar proportions in all three samples, accounting for between 52%-53% of the samples.

Those staying on Long Holidays were slightly fewer in 1999 (74.3%) than 1998 (79.1%), those staying for Short Breaks had decreased slightly from 17.0% in 1998 to 16.2% in 1999. This also represented a continuing decrease from 23.9% in 1997. On the other hand Day Trips from home showed a noticeable increase from 2.5% in 1998 to 7.2% in 1999.

Generally, the most common reasons people found out about Pembrokeshire were the same, mainly because they'd Been Before (64% - 65% in 1997/98 but down to 52.9% in 1999), Word of Mouth which accounted for 22.9% in 1998 and this decreased to 15.8% in 1999, and Advertisement. This showed a significant increase in informing people about the area, rising from 6.4% in 1998 to 17.4% in 1999. Their decision to visit Pembrokeshire was also based on the same factors across all three samples. However, whereas the fact that they'd Been Before was most important to 61.0% of the 1998 sample, this had decreased to 35.5% by 1999, and the Coast was a more significant factor to the 1999 sample (55.1%), followed by the Countryside (55.1%).

The geography of peoples' accommodation was similar for all three years, with Tenby and Saundersfoot remaining the most popular locations, although the proportions staying at these centres decreased slightly with 29.3% staying in Tenby in 1998 compared with 25.1% in 1999, and the same figures for Saundersfoot being 15.9% and 11.7% respectively. Interestingly, the popularity of the Inland Borders and Haverfordwest & St Brides Bay had increased. In the case of the Inland Borders this went up from 4.7% in 1998 to 9.0% in 1999, with a smaller increase from 2.7% to 3.5% in the case of Haverfordwest & St Brides Bay.

6c: Accommodation

The popularity of the serviced accommodation sector declined between the 1998 and 1999 survey. Lower percentages were staying in Guesthouses/B&B/Farmhouses in 1999 (15.7%) than either 1998 (23.2%) or 1997 (20.2%). A slight increase occurred among those staying in Static Caravans, continuing the slowly increasing trend from 16.9% in 1997, 17.4% in 1998, to 18.1% in 1999. More noticeable was the increase in those staying in Tents between 1999 (8.3%) and 1998 (5.2%), and Touring Caravans (11.4% in 1999 and 9.0% in 1998).

A comparison of accommodation type by location showed more significant differences. Those staying in the serviced sector in Tenby had decreased, especially for Guesthouse/B&B/Farmhouse accommodation which declined from 36.4% in 1998 to 28.4% in 1999, while the equivalent drop for Hotel accommodation was from 67.0% in 1998 to 63.2% in 1999. While Hotel accommodation rose slightly in Saundersfoot from 15.4% in 1998 to 18.1% in 1999, the percentage staying in Guesthouses/B&B/Farmhouses showed a large decrease to only 9.9% in 1999 (from 26.4% in 1998). The corresponding figures for 1997, however, differed sufficiently so as not to indicate a trend over the three years. Other changes between 1998 and 1999 included a decrease in the popularity of Touring Caravans in Tenby (27.5% in 1998 and 18.0% in 1999), and an increase in Tenting in St David's from being absent in 1998 to making up 4.7% of the sample in 1999. Interesting changes were also evident in Pembroke with a decrease in Touring Caravans from 7.7% in 1998 to 3.2% in 1999, and a much larger drop in those Tenting from 18.0% in 1998 to 4.7% in 1999.

Methods of booking showed slight changes, with a continued increase across the three samples in those booking In Advance direct with a Proprietor, increasing from 48.6% in 1997, to 56.3% in 1998, and 59.1% in 1999. This does suggest a trend in people planning their holidays in advance.

By accommodation type, fewer were booking In Advance direct with a Proprietor for Guesthouses/B&B/Farmhouses, with 30.0% doing this in 1997, 26.% in 1998, and 18.8% in 1999. On the other hand, the same figures for Static Caravans showed an increase from 17.0% in 1997 to 22.1% in 1999. This also reflects the increased popularity of the self-catering sector occurring across the samples. Booking In Advance using an Agency showed a decline, with those staying in Static Caravans clearly favouring booking through a proprietor, with a decrease in Agency bookings from 27.0% in 1997 to 8.8% in 1999.

Differences by socio-economic group were focused on shifts between favouring the serviced and self-catering sectors. The changes found between 1997 and 1998 for Groups C1 and C2 – with C1 using the serviced sector more in 1998 and C2 using it less – were reversed for C1 by 1999 while C2 showed a continued decrease in this area, with both groups favouring self-catering. Groups D, A and B were using the serviced sector to a higher degree by 1999.

While high levels of satisfaction were still expressed about the quality of the accommodation in Pembrokeshire, some changes were detectable. Fewer were describing their accommodation as excellent in 1999 (38.1%) than in 1998 (54.9%) or 1997 (46.4%), while more were describing it as Good (46.6% in 1999 and 35.8% in 1998). Across the accommodation types the same decrease in those describing accommodation as Excellent continued, with the exception of those staying in Hostels.

The trend continued for the decrease in importance of Verification of property by the Wales Tourist Board, with only 19.1% believing it to be important in 1999, having decreased continuously from 34.5% in 1997. It was least important for Tenting and Guesthouses/B&B/Farmhouses in 1999, but Verification did show a slight increase in importance for Static and Touring Caravans in 1999 than 1998.

6d: Activities and Attractions

The same activities were popular in all three samples, but with a slight change in their order of popularity by 1999, along with a drop in participation levels. Touring by Car was the most popular in 1997 and 1998, followed by Walking and Swimming. By 1999 Walking had become more popular than Touring by Car, the increased cost of fuel perhaps having an effect. Watersports had increased in popularity by 1999. The same trends were apparent when activities were compared with age group, younger people favouring more active events such as Watersports, Horse Riding, Cycling and Swimming, while older age groups preferred Sailing and increasingly also Golf and Bird Watching. Similar trends prevailed across the socio-economic groups, with the addition of Golfing appealing to Group B, Group D extending their interests to include Watersports and Cycling, Bird Watching being popular in Group C1, and Fishing and Watersports appealing to C2.

The Pembrokeshire Coastal Path remained the most popular walk used by all three sets of visitors, while increased numbers participated with 34.2% walking every day in 1997, 38.6% in 1998, and 41.6% in 1999.

The same attractions were popular in 1999, however, the options listed in the questionnaire had changed, making it difficult to make a direct comparison with the earlier survey results. Pembroke Castle, St David’s, and Bosherston Lilly Ponds were the most popular attractions in 1997 and 1998, and this had changed in 1999 to Castles (generally), Pembrokeshire Islands, and Bosherston Lilly Ponds.

Similar proportions were visiting Tourist Information Centres in 1998 and 1999 (51.8% and 51.2%), and while Tenby was still the most popular Centre, the popularity of Kilgetty TIC had risen significantly, followed by Saundersfoot and Pembroke. By 1999 the least likely to visit TICs were still the older age groups, and also those aged 18-25. By socio-economic group, Group D remained the least likely to use TICs as it had been according to the 1998 results.

Average daily spending on Accommodation and Other Goods had changed over the three samples, although trend or consensus was hard to find. By 1999, fewer were spending in the £11-£20 bracket on accommodation – 33.0% compared with 44.0% in 1997 and 1998. The percentage spending on Other Goods in this bracket was 59.1% in 1997, 41.4% in 1998 and 44.7% in 1999. Although this showed a slight increase in 1999, there occurred a decrease in numbers spending on Other Goods in the £21-£40 bracket (17.3% in 1999 and 26.1% in 1998). By age group, the older age cohorts were spending in larger numbers in the lower price bracket of under £10 on Accommodation in all three samples, and by 1999 this also applied to the youngest age group 18-25. By socio-economic group, spending on Accommodation had changes slightly, with Groups C1 and C2 spending under £10 more often on their room, whereas Group D had done this most often in 1997 and Group C2 in 1998. Spending in the £21-£40 bracket was most common among Group A in 1997 and 1998, but Group B did this most often in 1999, while spending on Accommodation in the highest bracket of £41+ was done by Group A in 1999 and 1998.

The three samples were spending most popularly on the same goods, although their frequency of spending was less in 1999. The order of popularity had changed from Petrol (in Pembrokeshire), Food & Drink in Cafés and Restaurants, and Admission Fees in 1997 and 1998, to Food & Drink in Cafés and Restaurants being the most popular in 1999, followed by Petrol, and Food & Drink in Shops. Again the same trend held by accommodation type, with those staying in Hotels, Guesthouses/B&B/Farmhouses, and also Static Caravans spending less often in 1999 than the previous two years.

6e: Future Plans and Possible Improvements

The same five features that appealed to visitors were popular among all three samples, with the most popular being the Coast, Peace & Tranquillity, the Countryside, a Friendly Welcome, and the National Park. Peace & Tranquillity was the second most important in 1999 compared with the third most in 1998. Heritage has also risen in popularity to fifth position by 1999, along with the importance of Family/Visitor Attractions. By age, older people were more drawn to a Friendly Welcome, Quality Accommodation, and Local Food in all three surveys, while Peace & Tranquillity was also very important to those ages 55+ in the 1999 sample. Among younger age groups, Outdoor Activities were consistently more popular, and in 1999 Coast and Countryside were more evident as factors appealing to under 25s. By socio-economic groups any consistent trends or patterns seemed less apparent.

High levels of satisfaction were expressed with the area, and when asked for ways to improve the area 23.0% answered None in 1998, while 39.0% answered the same in 1999. Improvements called for were similar in all three samples, with Toilets, Parking, Sign Posting and Traffic issues being the main concerns.

In terms of returning to the area in 12 months time, the percentage saying Yes they would return was 47.9% in 1997, rose to 54.5% in 1998, and fell to 47.0% in 1999 which also had the highest percentage answering No (27.0%) they would not return the following year. The most significant change here was in the nature of the holiday people were intending to take on returning. Those planning Long Holidays (4 nights or more) decreased from 70.6% in 1998 to 59.6% in 1999. Percentages intending to take Short Breaks showed a small increase from 24.8% in 1998 and 28.1% in 1999, while those planning Day Trips - from home was only around 2.0% in both 1997 and 1998, but this rose to 10.9% in 1999. More intended to stay in Static Caravans in 1999, compared with Self-Catering Cottages /Flats/Chalets in 1998, and Guesthouse/B&B/Farmhouse accommodation was also popular in each sample.

SUMMARY AND CONCLUSIONS

1. SUMMARY POINTS

Demographic Characteristics

- The majority of visitors in the sample (93.7%) came from the UK, with 3.1% coming from Europe, mainly Germany and The Netherlands.

- A large proportion of the sample (81.3%) were middle to high income earners in socio-economic Groups C1, B and C2. Higher proportions of those in Group C1 were aged 18-44 (57.4%), in Group B were aged 45-54 (29.6%), and in Group D were aged 55+ (35.0%).

- The majority were home owners (84.3%). Over a quarter (26.6%) had access to the Internet at work, and almost one in three (31.2%) had access to it at home.

Visiting Pembrokeshire

- Most respondents (92.0%) were visiting Pembrokeshire for Holiday or Leisure. Over half the sample (51.8%) were not accompanied by children.

- Three quarters of the sample (74.3%) were on Long Holidays (4 nights or more), 16.2% were on Short Breaks (1-3 nights), and 7.2% were on Day Trips – from home. This was the main holiday of the year for over half the sample (54.4%).

- Most respondents found out about Pembrokeshire because people had Been Before (53.0%), seen Advertisements (17.4%), or by Word of Mouth (15.8%).

- The most popular reasons for visiting Pembrokeshire were the Attractive Coast (55.1%), Attractive Countryside (39.9%), and because they'd Been Before (35.5%). Most travelled to the area by car (87.0%), and those who did use public transport were satisfied but some found it inconvenient and unpunctual.

- Tenby and Saundersfoot were the most popular accommodation bases, along with the Inland Borderlands (Narberth, Lawrenny).

Accommodation

- The most popular types of accommodation were Static Caravans (18.1%), Self-Catering Cottages/Flats/Chalets (16.0%), and Guesthouses/B&B/Farmhouses (15.7%). The self-catering sector was generally more popular, while the serviced sector was still important in Tenby (49.5%), and also Haverfordwest & St Brides Bay (41.7%), and Pembroke (36.0%). Hotels were particularly popular in Tenby.

- The largest proportion booked their accommodation In Advance direct with a Proprietor (46.8%). Those booking On Arrival direct with a Proprietor favoured Tents and Guesthouse/B&B/Farmhouse accommodation, those booking In Advance direct with a Proprietor preferred Static Caravans and Self-Catering Cottages/Flats/Chalets, and those booking In Advance through an Agency also favoured the latter. Hotels and Static Caravans were more popular among older age groups, especially those aged 65+, and younger people preferred Tents and Touring Caravans.

- Quality of accommodation was perceived as high, with 65.1% saying it was Excellent or Good.

- Just under one in five (19.1%) thought Verification by the Wales Tourist Board was an important consideration, with almost a third (30.1%) believing it not to be important. Verification was more important to those staying in the serviced sector (Hotels and Guesthouses/B&B/Farmhouses), and also to a lesser extent to those staying in Self-Catering Cottages/Flats/Chalets.

Activities and Attractions

- The most popular activities were Walking (56.2%), Touring by Car (51.9%), and Swimming (36.7%). Older age groups (55+) preferred Bird Watching and Golf, and younger age groups enjoyed Watersports, Cycling, and Horse Riding.

- The Pembrokeshire Coastal Path was the most popular footpath, with 19.4% saying they would walk footpaths every day during their visit, and 12.3% walking every other day, mostly up to three miles a day.

- The most popular attractions in the area were Castles, Pembrokeshire Islands, Bosherston Lilly Ponds, Oakwood, and Farm Based Attractions. Among older age groups (55+) Spiritual Heritage Centres, Art & Craft Galleries, and Gardens and Garden Centres were favourites, while younger age groups (25-34) were drawn more to Farm Based Attractions and Oakwood.

- Half the sample (50.4%) said they were likely to visit a Tourist Information Centre somewhere in the area, with Tenby, Kilgetty, Saundersfoot, and Pembroke being the ones most likely to be visited. Those unlikely to use TICs either knew the area well, or had picked up leaflets/information at their accommodation/other sites. Least likely to use TICs were older age groups (55+) as well as the younger group (18-25), and those in socio-economic Group D. Most likely to use TICs were those in Groups B and C1.

- The largest proportions were spending under £10 (22.7%) and £11-£20 (20.6%) on Accommodation, and £11-£20 (43.2%) on Other Goods. Spending on Accommodation increased with increasing age, but no clear pattern emerged for spending on Other Goods.

- Type of accommodation clearly affected expenditure, with those staying in Hotels spending larger amounts more often on both their room and Other Goods. Those staying in Tents and Touring Caravans were spending less on Accommodation.

- The most popular goods and services respondents spent on were Food & Drink in caf□s and restaurants (68.8%), Petrol (in Pembrokeshire) (60.0%), Food & Drink in shops (56.9%), and Admission Fees (52.7%)

Future Plans and Possible Improvements

- An Attractive Coast (69.3%), Peace and Tranquillity (57.4%), and Attractive Countryside (47.0%) were the most appealing features of the area. Peace and Tranquillity, a Friendly Welcome, Quality Accommodation, and Local Food were increasingly important with increasing age (especially for those 55+). The Coast and Countryside were more appealing features to younger age groups.

- Suggestions for improvements needed most in the area focused on Toilets, Parking, Sign Posting, and Traffic Problems.

- Less than half the sample (47.0%) intended to visit Pembrokeshire again in the next 12 months. This was mostly for Long Holidays (4 nights or more) (59.6%), with a significant proportion intending to come on Short Breaks (28.1%), and 10.9% were planning Day Trips – from home. This was mainly in the self-catering sector. Over a quarter (27.0%) did not intend to return in the next year, in most cases this was because they wanted to visit somewhere different, and 23.8% were undecided.

Changes over Time

- The 1999 sample had a higher and more realistic proportion of elderly represented than in the 1998 or 1997 samples. The proportion of visitors to the area from Wales had increased noticeable from 18.7% in 1998 to 23.5% in 1999.

- Internet access at work had increased from 23.5% to 26.6%, while those having access to the Internet at home had risen from 9.4% in 1997 to 31.2% in 1999.

- Long Holidays (4 nights or more) had decreased slightly from 79.1% in 1998 to 74.3% in 1999, Short Breaks had also declined though less so, from 17.0% in 1997 to 16.2% in 1999, while Day Trips had shown an increase from 2.5% in 1998 to 7.2% in 1999.

- Residents were still finding out about Pembrokeshire because they had been before and because of word of mouth, but those who had found out because of advertising had risen significantly from 6.4% in 1998 to 17.4% in 1999. The attractive coast and countryside were still important reasons for visiting the area, while the fact that respondents had been before was less important.

- Tenby had decreased slightly in popularity as a base where people stayed, from 29.3% in 1998 to 25.1% in 1999. On the other hand, the Inland Borderlands and Haverfordwest & St Brides Bay had increased in popularity.

- The serviced sector had declined in popularity in 1999, while Touring, Tenting and Static Caravans were showing an increase. There was also a slight decrease in the percentage staying in Tenby in Hotels and Guesthouses/B&B/Farmhouses, while the largest decrease was in those staying in Saundersfoot in Guesthouses/B&B/Farmhouses which fell from 26.4% in 1998 to 9.9% in 1999.

- There was a continued increase in those booking their visit In Advance direct with a Proprietor, from 48.6% in 1997 to 59.1% in 1999. Booking In Advance through an Agency decreased from 27.0% in 1997 to 8.8% in 1999.

- Perceptions of excellence in the quality of accommodation had declined somewhat, with 54.9% saying this was Excellent in 1998 compared with 38.1% in 1999, and this was across all accommodation types with the exception of Hostels which showed an increase or improvement.

- Verification of accommodation by the Wales Tourist Board continued to decline in importance, from 34.5% who considered it an important factor in 1997 to 19.1% in 1999. It was least important to those staying in Tents and Guesthouses /B&B /Farmhouses, and showed a slight increase in importance for those in Static and Touring Caravans.

- The Pembrokeshire Coastal Path was the most popular footpath in all three samples. An increased number participated over time with 34.2% saying they walked a footpath every day in 1997 and 41.6% doing this in 1999.

- Kilgetty Tourist Information Centre increased in popularity between 1998 and 1999, while Tenby TIC remained the most popular, with Saundersfoot and Pembroke TICs being less so.

- More were spending on Food and Drink in cafés and restaurants in 1999 than in 1998, with slightly fewer spending on Petrol (in Pembrokeshire), and more on Food and Drink in Shops.

- Features appealing most to visitors were similar across all three samples, namely the Coast, Peace and Tranquillity, and the Countryside. The area’s Heritage, and Visitor Attractions had gained in popularity in 1999.

- The proportion of respondents intending to return to the area in the next 12 months showed a decrease, from 54.5% in 1998 to 47.0% in 1999. Fewer were planning Long Holidays in the 1999 sample (59.6% compared with 70.6% in 1998), and Day Trips from home showed an increase from 2.0% intending to take them as part of the 1998 sample to 10.9% in the 1999 survey. Static Caravans and the self-catering sector were drawing more people back to the area.

2. CONCLUSIONS

- There is a potential to develop both the European and Overseas market for visitors to Pembrokeshire, and also to increase the numbers of those visiting from Scotland and Northern Ireland, while the proportion visiting from Wales has shown an increase.

- Given the importance of an ageing population within the UK and into this century, then any investment in exploring and addressing the different needs and preferences of these older age groups would be worthwhile. The results of this survey highlight some of these differences which need further development.

- Internet access is clearly increasing, with one in three respondents in this survey having access to it from their homes, as well as access at work for many. This is an important way of reaching potential visitors to the area, in their homes as well as at work, at a global level, and a trend likely to continue increasing.

- There is still scope for increased and improved advertising of Pembrokeshire, leading to a potential increase in visitors to the area, and this also links well with Internet access. A significant increase has already occurred between 1998 and 1999 in those influenced by advertisements about Pembrokeshire, and this trend could be developed further.

- A trend has established of those booking their visits to the area In Advance direct with Proprietors, and this suggests a focus which could be developed further to the benefit of the proprietors and local businesses in Pembrokeshire.

- Verification is an issue that the Wales Tourist Board, and proprietors of local tourism properties, may wish to explore in the area, given the continued decline of its importance as a consideration in selecting somewhere to stay. Unfortunately no details are available from this survey as to why this trend should be occurring.

- The proportion of respondents visiting and making use of Tourist Information Centres was stable between 1998 and 1999, though not increased. Understandably, less use may be made of these by people returning to the area and being familiar with it, but given that older age groups are less likely to use TICs then this could be a fruitful area to explore and address in more detail in the immediate future.

- There is a clear potential to develop the attraction of the Short Break Holiday in Pembrokeshire, as well as encourage an interest in Long Holidays, and develop the increased interest in Day Trips from home to the area.

- There was an increased interest in eating out in the area, and in spending on Food and Drink both in cafés and restaurants and in shops, but the frequency of spending had decreased. There clearly exists an important link between the tourist sector and the area's local economy, highlighting the potential to develop aspects of visitor spending, in frequency and amount, which would ultimately benefit and expand the local economy.