



Hot Spot Visitor Survey

Carmarthenshire County Council

June 2021

Strategic Research and Insight Ltd
4 Park Court Mews
Park Place
Cardiff, Wales
CF10 3DQ
Tel: +44 (0)29 2030 3100

www.strategic-research.co.uk



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1. Background and Method

Why was this research commissioned?

With Covid restrictions reducing, it was inevitable Carmarthenshire would see a rise in visitor numbers, especially in its hot spot areas.

Carmarthenshire County Council commissioned Strategic Research and Insight (SRI) to conduct a survey of visitors in five hot spot areas.

This research will inform the Council about the overall visitor needs to these popular areas of Carmarthenshire. This will aid their understanding of the profile of visitors, their spend in the areas, motivation for visiting, and overall perceptions of the area as a place to visit.

Face-to-face interviews

For a representative approach, face-to-face bilingual interviewing was deemed suitable to understand the demographic makeup of overnight and day visitors, excluding 'local' residents (of up to 5 miles of the interviewing areas) from the research.

We have conducted 400 interviews (accurate to $\pm 4.9\%$ at the 95% confidence level) during Whitsun holidays between 31 May and 7 June 2021.

Sample composition by area:

Area	Interviews	%
Pendine Sands	119	30%
Pembrey Country Park	115	29%
Burry Port	106	27%
Llansteffan	33	8%
Laugharne	27	7%

Understanding the results

Not all questions have been asked to all respondents. Therefore, it is important when reading percentages to note what base the percentage is taken from. We make this clear throughout the report.

What is included in this report?

In the interest of keeping this report a readable length, we focus on the key findings and implications for Carmarthenshire County Council. Caution should be taken when interpreting results where small sample sizes are involved as the results are not statistically robust at this level.

A full breakdown of results by area and visitor type can be viewed in the accompanying crosstabs. Where results are significant by area or visitor type this has been highlighted in the report.

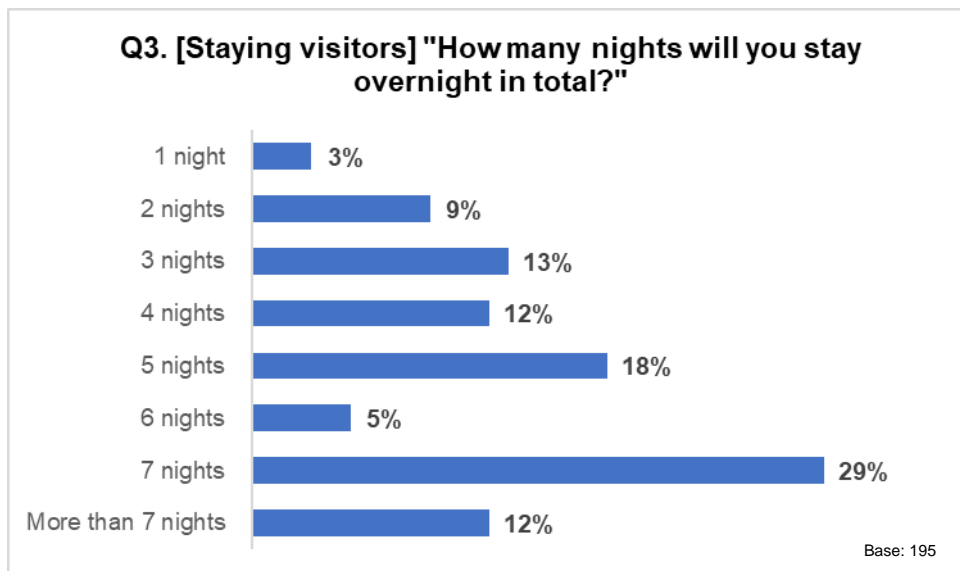
2. Visitor Profile

Day and staying visitors

The profile of day and staying visitors in the sample is as follows:

Visitor type	Interviews	%
Day visitor	205	51%
Staying visitor	195	49%

Those who were staying overnight were asked how many nights they would be staying overall; this is displayed in the below chart:



Seven nights or more, a more popular overnight stay duration

A 'holiday' is often defined in the tourism industry as seven or more nights; in this case 41% of staying visitors.

The overall average length of stay among staying visitors (excluding outliers) was 5.7 nights. Among party types with a large enough sample for this question, the average length of stay among overnight visitors was:

- Couples – 6.5 nights
- Families with older children – 5.5 nights
- Families with young children – 4.9 nights

Among origins with a large enough sample size for this question, the average length of stay among overnight visitors was:

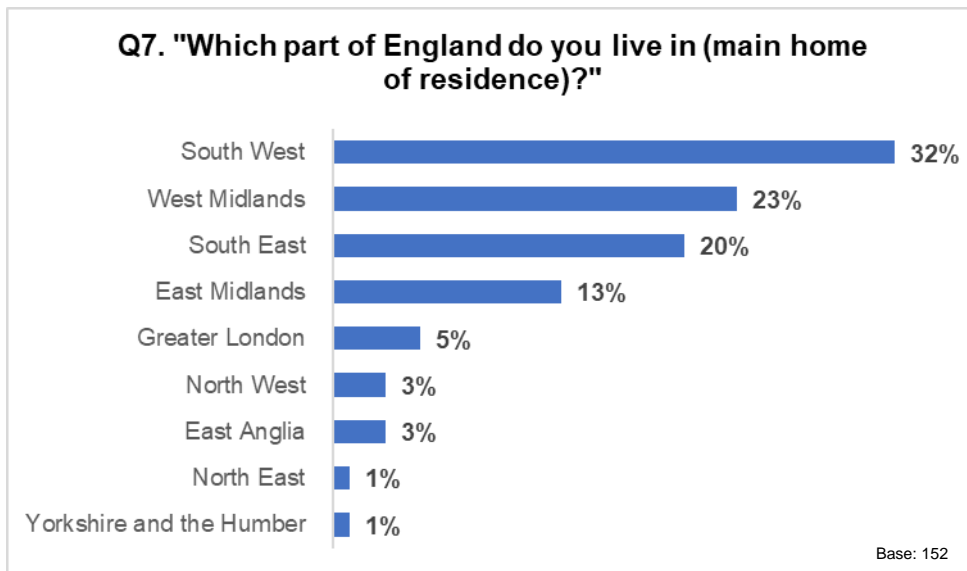
- South West England – 6.4 nights
- London & South East England – 5.7 nights
- West Midlands – 5.3 nights
- South Wales (outside local Carmarthenshire) – 5.0 nights

Origin of visitors



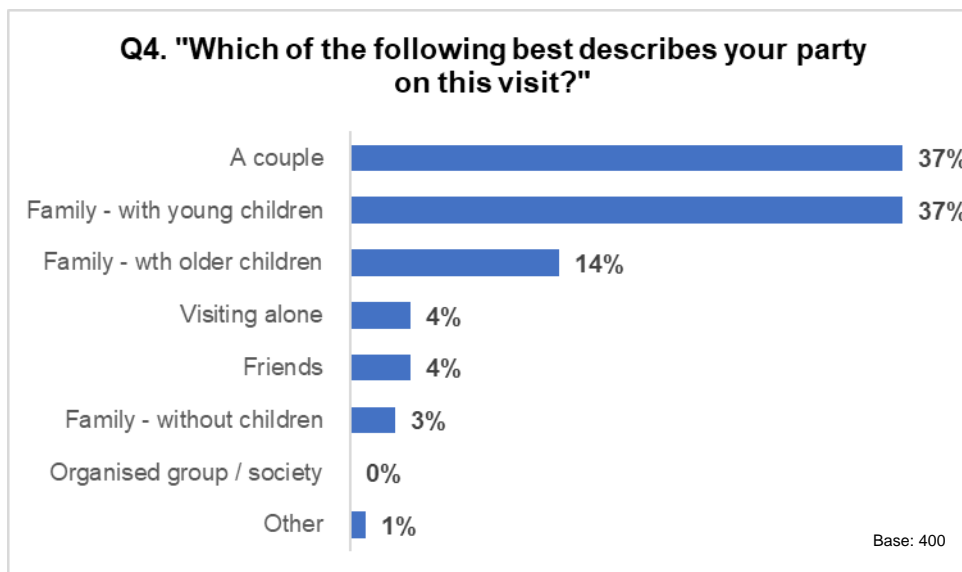
Base: 241

The above map shows where visitors in Wales were travelling from. Most (60%) are visiting from the south, with 14% being inherently local and have come in from Carmarthenshire. Looking outside of Wales, 7 respondents (2%) travelled from Scotland, but the remainder (38%) came from England.



People living in the M4 and M5 corridors have easier access to Carmarthenshire, and this is reflected in the profile of English visitors.

Party profile



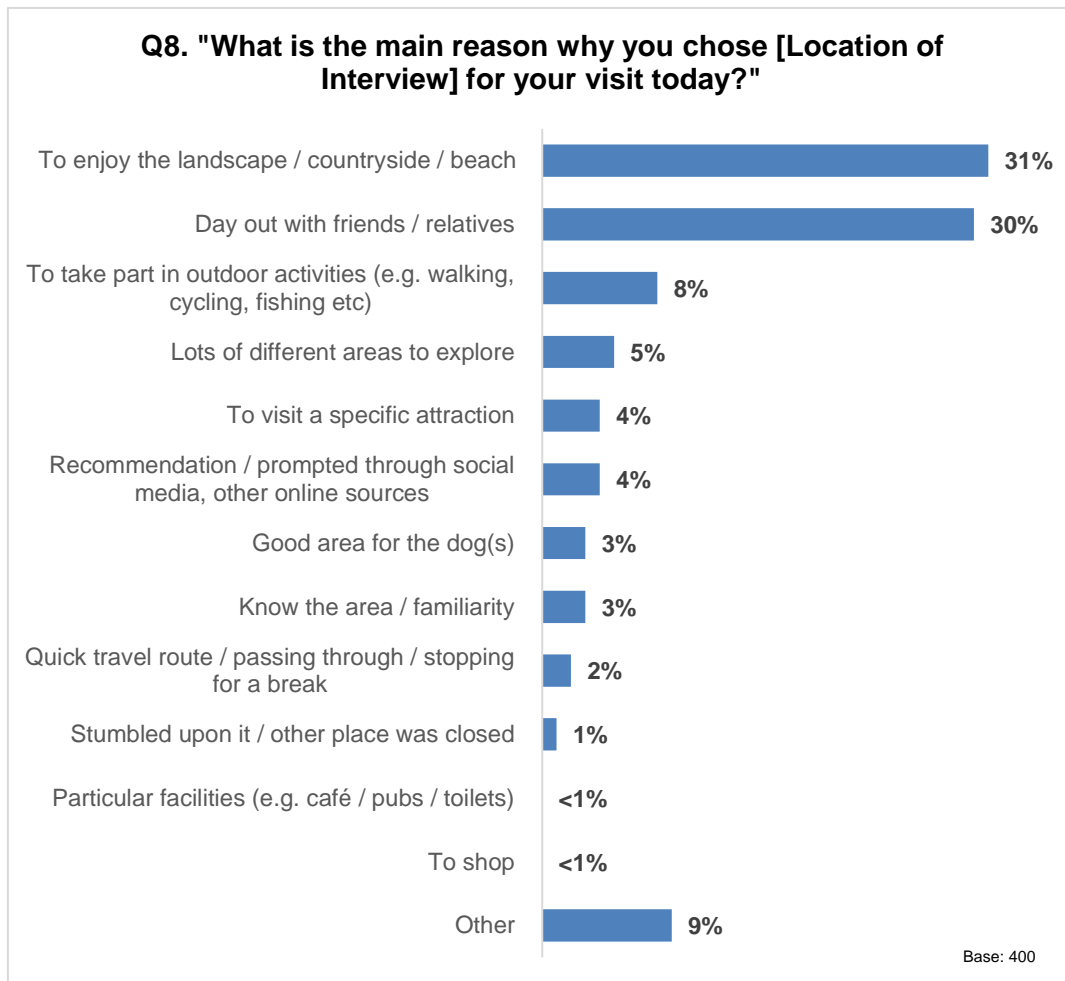
Appealing to couples and families with young children

Couples (37%) and families with young children (37%) dominate the overall visitor profile. There is a noticeable drop-off when the children are older.

50% of those interviewed at Pendine Sands were couples, whereas 56% of those interviewed at Pembrey Country Park were families with young children. Llansteffan and Laugharne saw more couples, and Burry Port had a mix.

3. Main Findings

Main purpose of visit

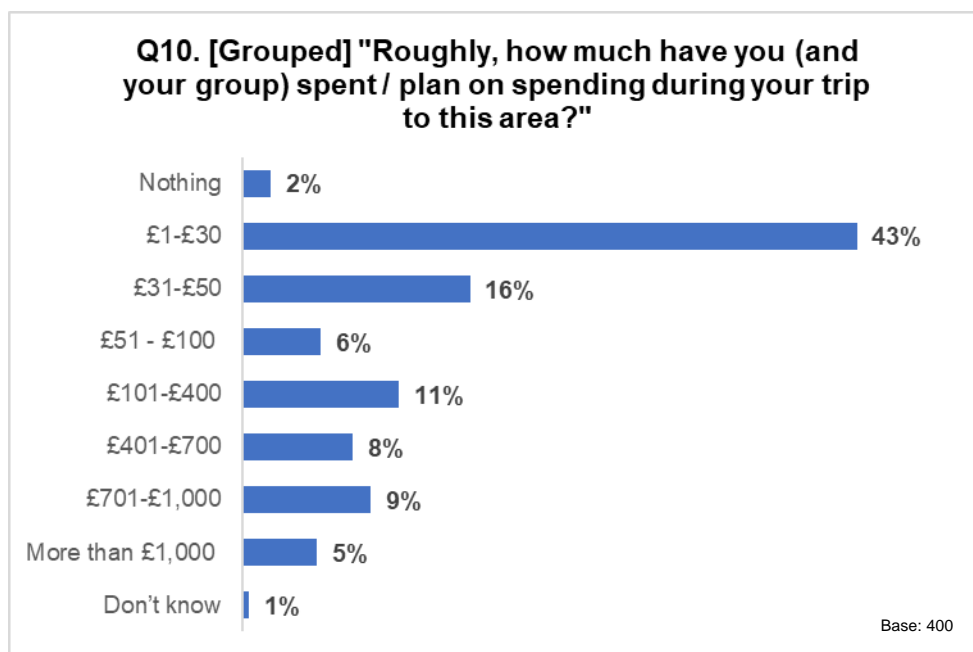


Staying visitors likely to visit because of the scenery

Respondents surveyed were asked for their main reason for visiting the hot spot areas. 31% visit to enjoy the landscape, countryside, or beach, and 30% mainly go for a day out with friends or relatives. Primarily 42% of staying visitors came to also enjoy the landscape, countryside, and beach. Unsurprisingly, day visitors tend to have a 'day out with their friends or relatives'.

A large majority (89%) of visitors travelled to the area by car/van, but 7% travelled on foot from their overnight accommodation.

Estimated expenditure



Average spend differs greatly by respondent type

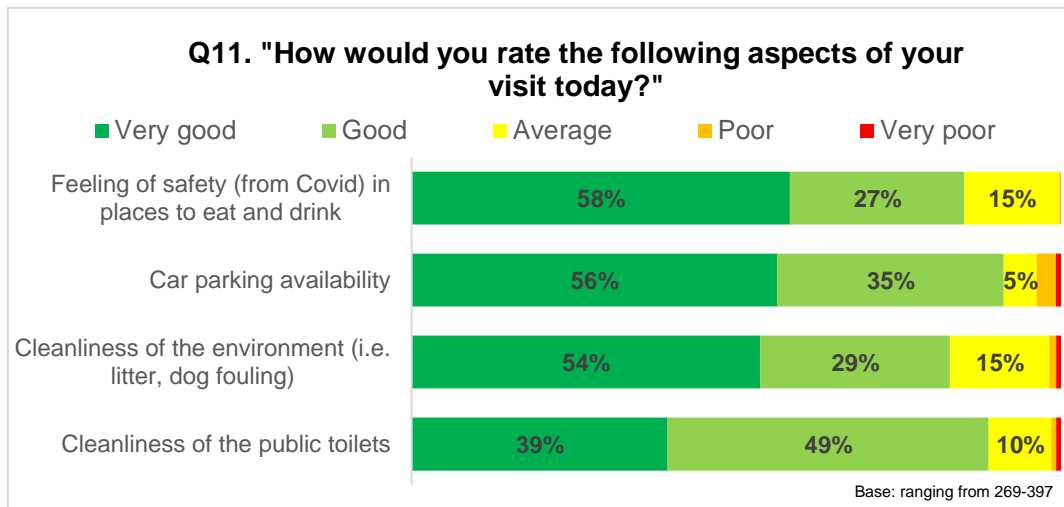
Day visitors spent an average of £33 per party, whereas overnight visitors spent an average of £474. This highlights the importance of attracting overnight stays in the region.

Within the overnight visitors group, those visiting friends and relatives spent a lot less - £185 per party, compared to £501 per party not visiting friends and relatives.

Also within overnight visitors, the group spend becomes significantly larger as the children become older. Average spend per party staying overnight was:

- Couples – £369 *on average*
- Families with young children – £485 *on average*
- Families with older children – £634 *on average*

General upkeep



We have excluded any 'not applicable' answers from the above results

Mostly positive rating of specific services

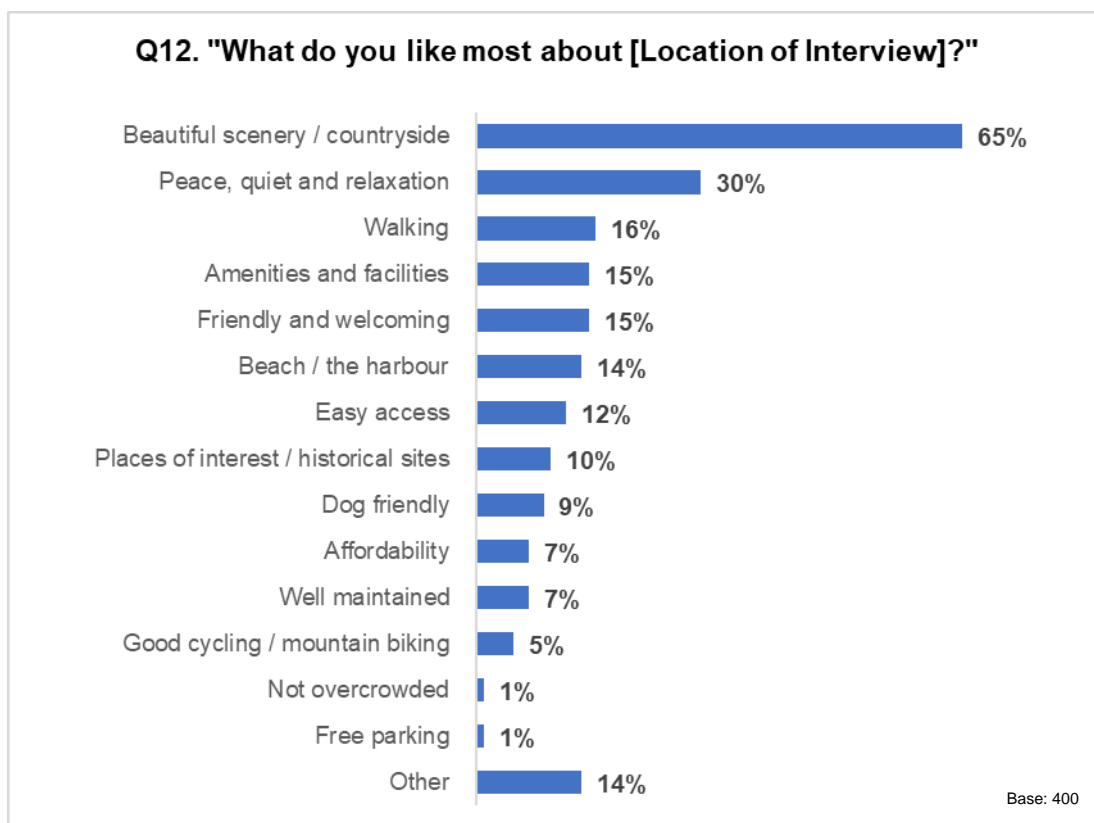
At the time of being interviewed not all respondents had used the public toilets to form an opinion on its cleanliness. Of those that had, most (88%) rated them of good hygiene.

Combining the ratings 'very good' and 'good', the availability of car parking was a top aspect that rated highly with the majority (91%).

Cleanliness of the environment was rated favourably by the majority (83%). However, 15% of visitors rated the cleanliness of the area as being 'average'.

With the impact of the Covid-19 pandemic on the tourism industry, particularly the food and drink sector, it is promising to see most (85%) have a feeling safety (from Covid) in places to eat and drink in Carmarthenshire.

Appeal of hot spot areas



Most appealing feature – beautiful scenery / countryside

The natural landscape of the hot spot areas appeals to most (65%) respondents. When looking at the responses by interviewing area, the natural appeal is quite evenly spread across all hot spot areas.

The next most popular aspect visitors are drawn to is the peace, quiet and relaxation (30%) of the area. Again this appeal is spread across all areas but more obvious with staying visitors (37%).

"Quieter and more peaceful than the Gower"
Burry Port, day visitor

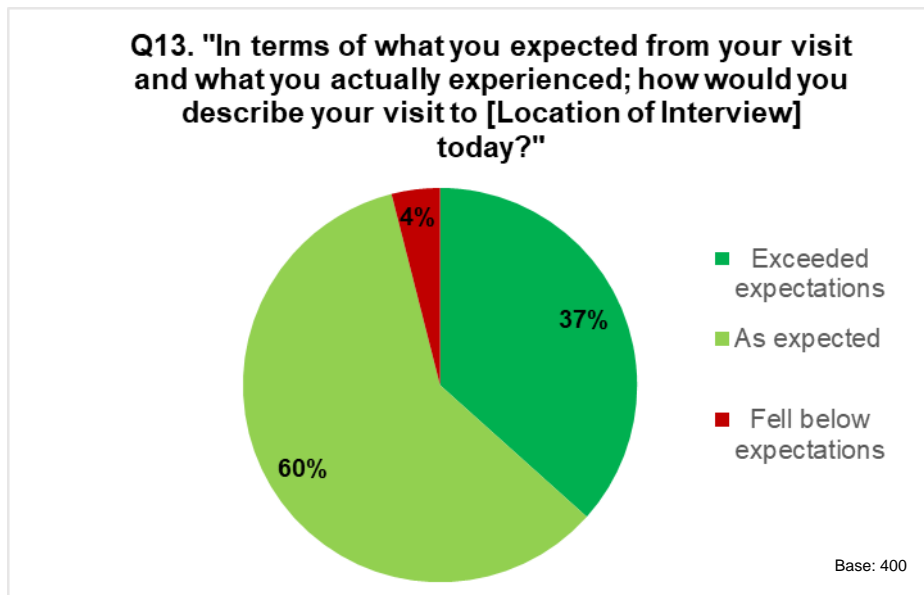
"Such a variety can walk, go to the beach, and have a picnic, all in a safe environment"
Pembrey Country Park, staying visitor

"Enjoy this part of West Wales, you can sit and look at the castle"
Laugharne, day visitor

"Not over commercialised and it's lovely and quiet"
Burry Port, staying visitor

"Open space and you can social distance"
Pembrey Country Park, day visitor

Expectations of Carmarthenshire



Most visitors see no change in their expectations

With 60% of visitors saying their visit to the hot spot areas is as expected, over a third (37%) say their visit exceeded their expectations. This also came from 48% of staying visitors.

There is no real difference in which area had exceeded expectations, but a common theme in the open comments is that the natural landscapes and scenery of the hot spot areas is a strong influence, especially in good weather.

"Great beach, fab weather"
Pendine Sands, staying visitor

"We did not expect the weather to be as nice which makes the coastline look spectacular"
Burry Port, day visitor

"Fab beach, lovely rural countryside"
Pendine Sands, staying visitor

"The beautiful view from the coast path. You can see for miles"
Burry Port, staying visitor

"Probably the weather helps everything seem better"
Burry Port, day visitor

"By far exceeded. The beaches are hidden but on first view they took my breath away"
Burry Port, staying visitor

"The scenery is astonishing"
Pembrey Country Park, staying visitor

Those who say their visit is as expected seem to be regular visitors and are therefore familiar with the hot spot areas already.

“Came here on holiday once and loved it, now we’re back for the day”
Pendine Sands, day visitor

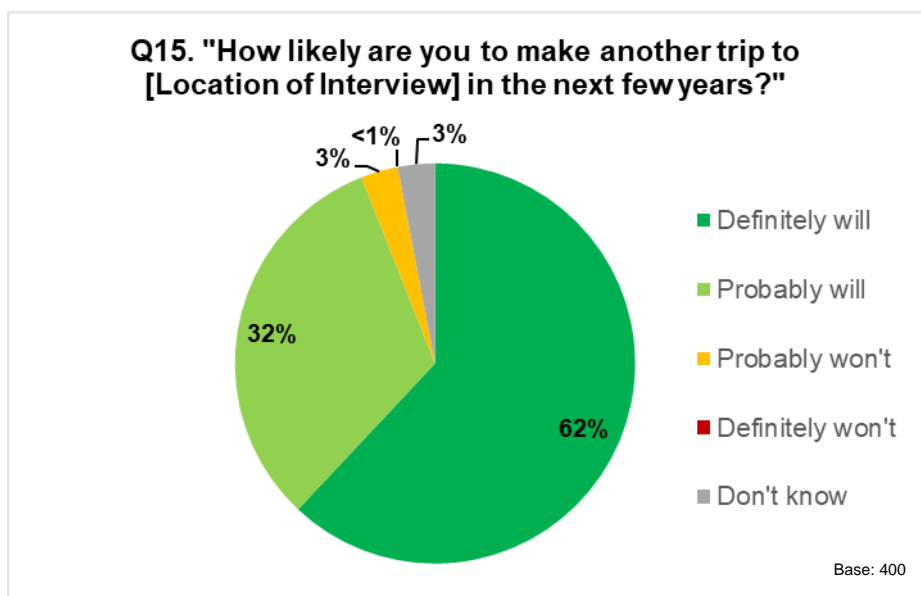
“We’ve been before but like it because it’s not overcrowded”
Burry Port, staying visitor

“Often visit here and love it”
Pendine Sands, day visitor

*“Had a vague idea of what to expect and good access to coast paths for wheelchairs
etc”*
Burry Port, staying visitor

“Been here so many times, it’s our favourite place”
Burry Port, staying visitor

Likelihood of returning



Intentions of returning are very high

The vast majority (94%) of visitors will 'definitely' or 'probably' be returning for another trip in the next few years.

"Reasonably local, 89 miles but the best beach"
Pendine Sands, staying visitor

"Nice unspoilt scenery good beach coastal walks"
Burry Port, day visitor

"We love the open scenery and it's not overcrowded"
Burry Port, staying visitor

"We are looking to come back in August to the same site so we will do another day trip to Burry Port"
Burry Port, staying visitor

"Like it here and there is not anywhere else like it"
Pendine Sands, staying visitor

"Wide space, lots to do and coastal walks"
Pembrey Country Park, staying visitor

Conversely, only 3% who say they either 'definitely' or 'probably' won't visit again are generally staying visitors who have travelled some distance to get to these hot spot areas, and it depends on their next holiday booking, or they only prefer one-off visits.

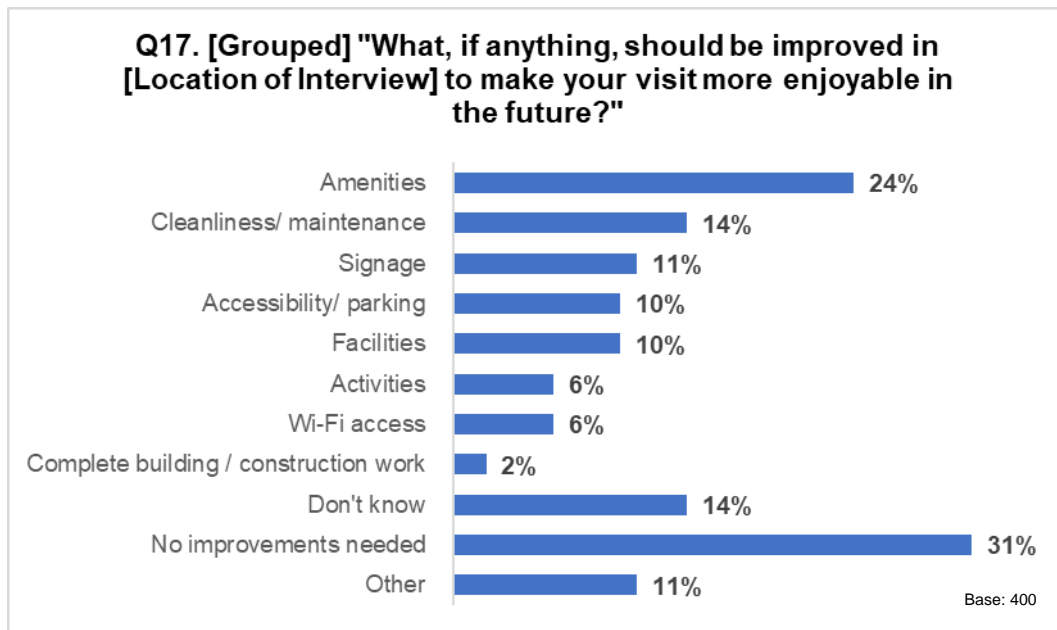
"A long way away from home"
Pendine Sands, staying visitor

"Go to different places every year. If we are ever in the area, we will visit again. We tend to go to different places."
Laugharne, staying visitor

“Depends on my holidays”
Pendine Sands, staying visitor

“Too far to travel, only visit places once”
Laugharne, staying visitor

Improvements to the area



Some do not feel improvements are needed, others have ideas

Respondents were asked what would make their visit more enjoyable in the future, and around a third (31%) do not think improvements are required.

However, here we have grouped their responses into a concise list of aspects that would make their visit more appealing. Those that have some suggestions tend to be around the amenities (24%) provided. Amenities includes anything from better cafés / restaurant opening times, more shopping (non-grocery), picnic areas and generally more places to eat.

"Thought eating and drinking places would be open later"

Burry Port, staying visitor

"Maybe a better choice of places to eat"

Burry Port, day visitor

Next, the suggestions surround the cleanliness and maintenance (14%) of the areas. This includes better maintenance and upkeep of paths, better cleanliness, litter and dog fouling management, and also better maintenance and cleanliness of the toilets.

Another concern visitors feel would improve their perception of future visits would be better signage and interpretation and information boards (11%).

"Better signage for the toilets"

Burry Port, day visitor

"More accessible information needed"

Pembrey Country Park, day visitor

"More signs suggesting payment for vehicle on entry to avoid later queues"

Pembrey Country Park, staying visitor

“Signage on far car park to tell what’s here”

Llansteffan, day visitor

“Signage was misleading on the length of the walk”

Burry Port, staying visitor

“Signs in Welsh”

Pembrey Country Park, staying visitor

Other (11%) open comments covered more specific issues visitors have experienced:

“More electric charging points for vehicles”

Burry Port, staying visitor

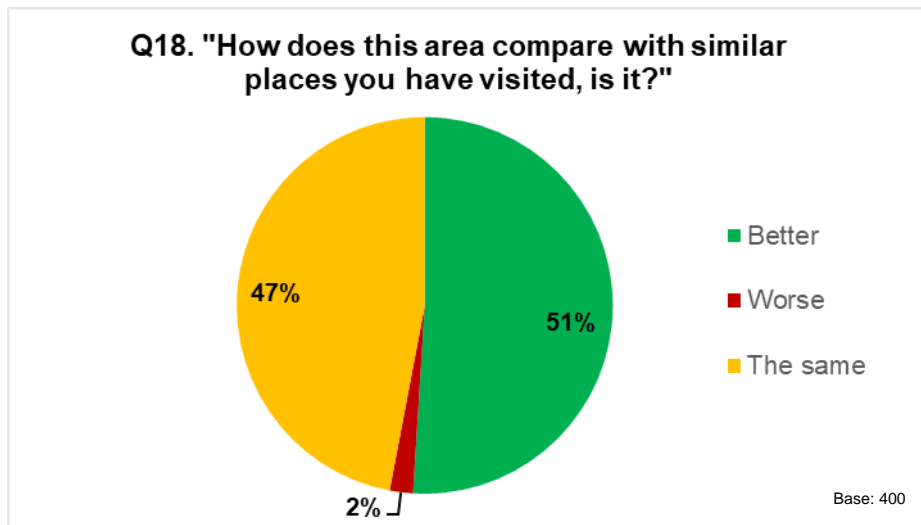
“Accommodation with lifts”

Laugharne, staying visitor

“Maybe a shelter area as it is exposed to the elements”

Burry Port, staying visitor

Comparisons to similar places



Very favourable comparisons with other destinations on balance

About half (51%) of visitors say the area is better than comparable places they have visited, and only a small minority deem it to be worse. This is a very favourable comparison on balance, although it is worth noting that the perception of visitors to any area is positively biased towards that area because they would not visit if they already knew or expected their experience to be poor.

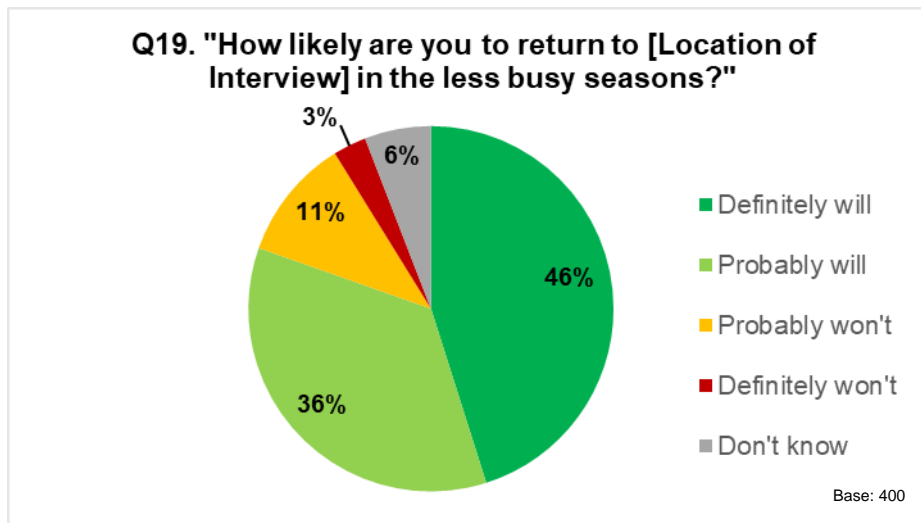
The 2% feeling the area is worse is only from 8 respondents:

"There's not enough here to cater for all our needs"
Burry Port, staying visitor

"Lack of children's playground"
Pendine Sands, day visitor

Those who rate the area better than comparable places are most likely to be visitors interviewed in Pembrey Country Park (62% rate it better).

Likelihood of returning during less busy times



Less busy seasons will attract the majority

While universal challenges in a pandemic are being experienced by many, especially the tourism industry, visitors are highly likely (82% combined 'definitely' and 'probably') to return to hot spot areas of Carmarthenshire during the off-peak season. 11% 'probably' won't return, and 3% 'definitely' won't.

Again, similarly to an earlier question, respondents say they will not return either because of the distance it would take them to travel to the areas, or the fact it is dictated by when school holidays fall.

"Bit too far to come"

Pendine Sands, staying visitor

"Only during school holidays"

Burry Port, staying visitor

"Too far away for a holiday only on peak times"

Pendine Sands, staying visitor

"Too far to travel again"

Laugharne, staying visitor

"We wouldn't be here at that time of year"

Burry Port, staying visitor

4. Implications for Carmarthenshire County Council

Wide open spaces and scenery are positive impacts

Covid lockdowns and restrictions have meant that visitors were starved of their freedom. They were not allowed to travel and explore areas like these hot spots in Carmarthenshire. It is not surprising that the majority of visitors thought the 'Beautiful scenery / countryside' was their favourite aspect of their trip.

Visitors are astonished by the spectacular views of these hot spot areas, appreciating the extra space to feel safe and be socially distanced whilst still meeting friends and family.

More amenities would attract and increase the offering

An increase in the types of amenities being offered would certainly help boost the visitor experience for some.

Amenities include finding more suitable places to eat out, variety, non-grocery shopping and longer opening times of the cafés and restaurants. An increase in amenities would also mean more expenditure.

Cleanliness and maintenance are not a major issue but could boost overall perception

General cleanliness and maintenance of key areas, such as toilets, bins, pavements etc were not seen as a major issue, but it was raised by some who were interviewed in Pendine Sands.

This could be related to the ongoing issue that Carmarthenshire County Council are aware of – lack of bins/litter, and the management of dog fouling. These were some of the issues raised by visitors and were more apparent in Pendine Sands.

Signage is a minor issue but still a concern

By having more accessible information and clear signage, visitors raised this as a concern, highlighting it would improve their visit and make it more enjoyable in the future.
