

Swansea Bay Visitor Survey 2019



Background & Method

Beaufort Research commissioned to undertake survey of visitors to Swansea Bay to understand:

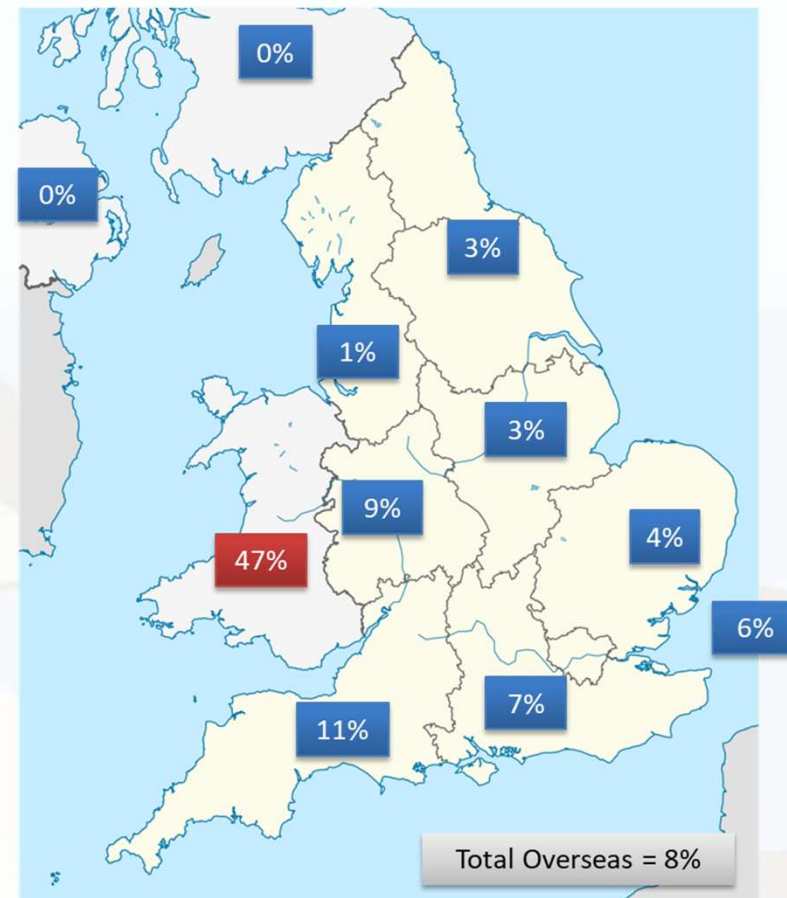
- Visitor profile
- Motivations for visiting
- Satisfaction
- Perceptions
- Information sources
- Spend

Research Method

- 1,005 face to face interviews undertaken with visitors aged 16+
- Visitors defined as:
 - Living outside the City & County of Swansea area
 - In the area for at least 3 hours
 - Not in area for routine visit (e.g. dentist, doctor, hairdresser, weekly grocery shopping)
- Interviewing across seven locations, including coverage of key event days
- Fieldwork: 13 April – 30 September 2019

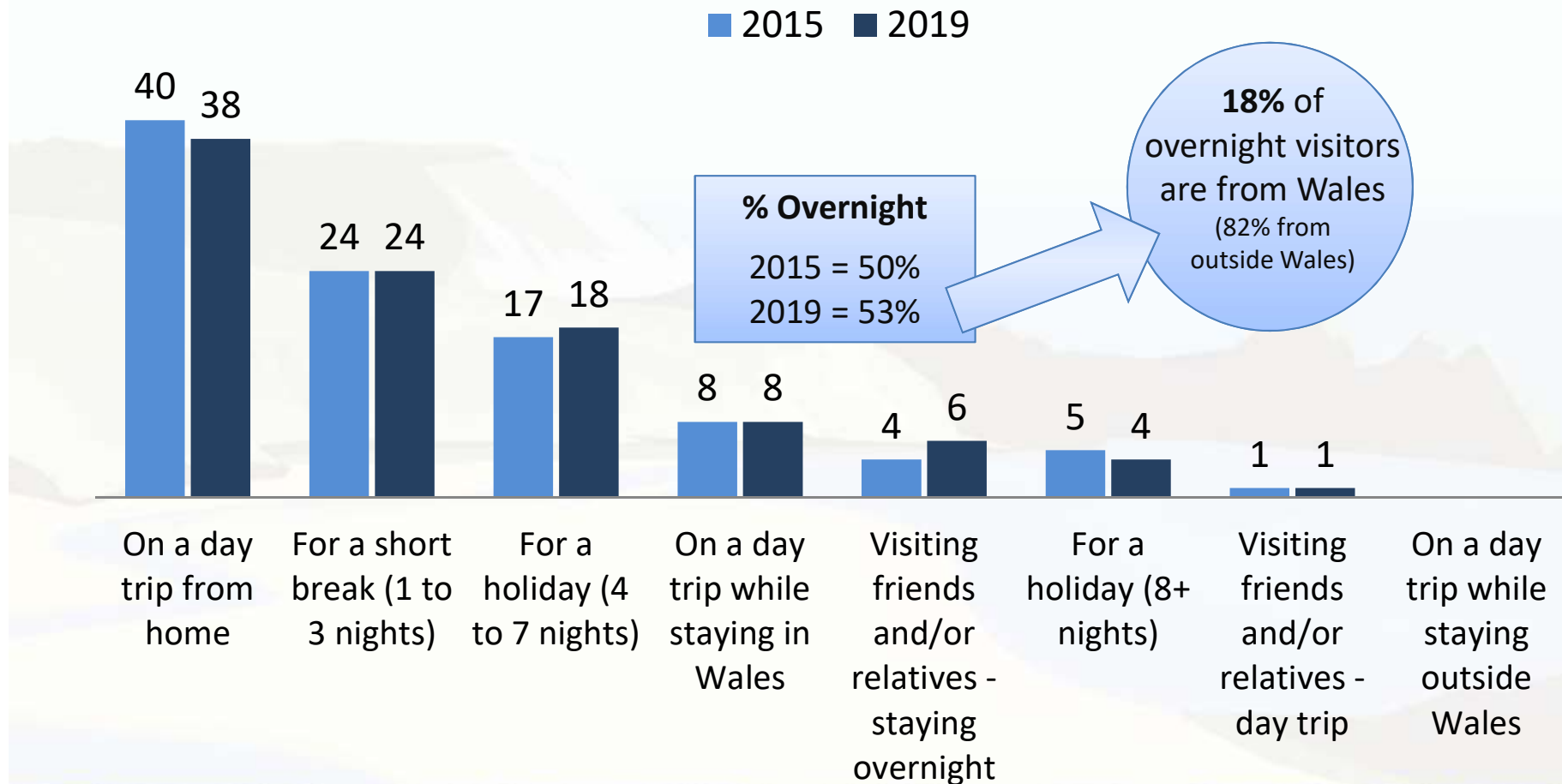
Visitor Profile

- 69% ABC1 (unchanged from 2015)
- 44% Age 55+, 36% age 35-54
- 47% from Wales, 45% from Rest of UK (key areas South West and West Midlands), 8% from overseas (Germany & USA)
- 40% visited with family group only (20% had young children), 36% with partner



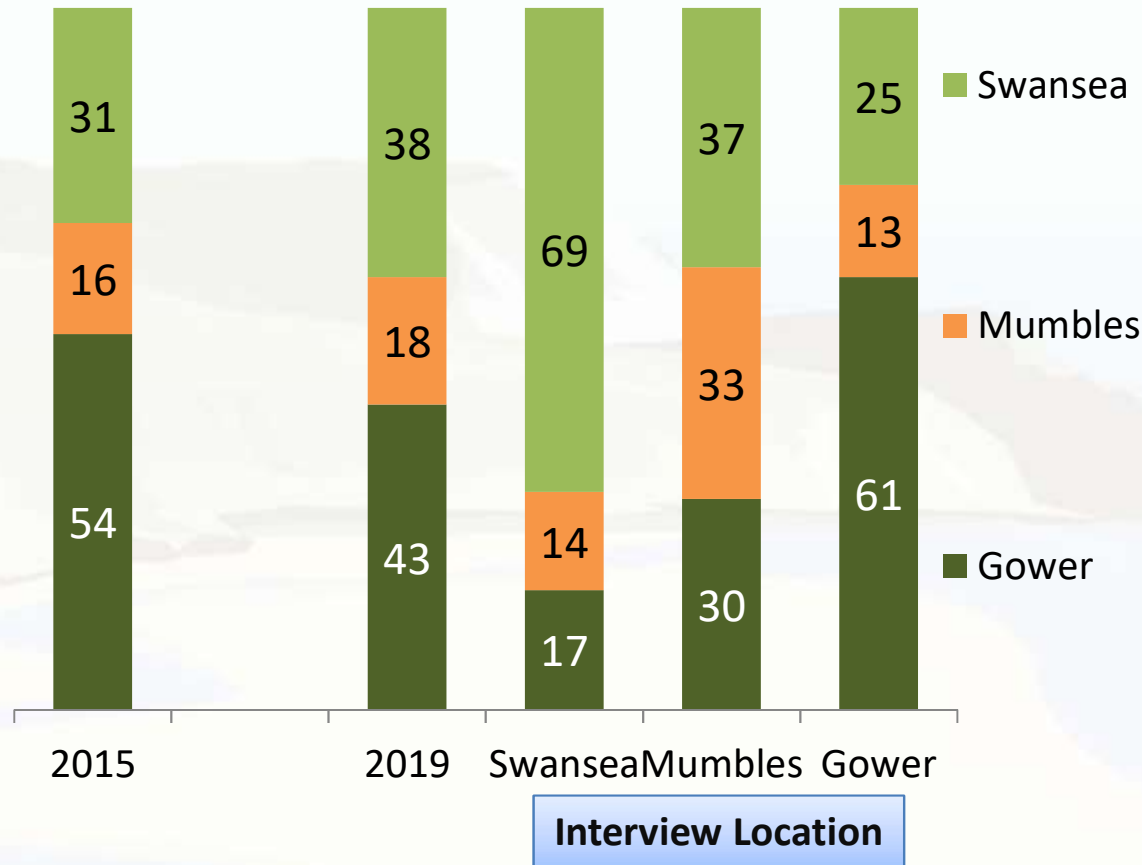
Type of visit

Q. Which of these is the MAIN purpose of your visit to Swansea Bay today? (%)



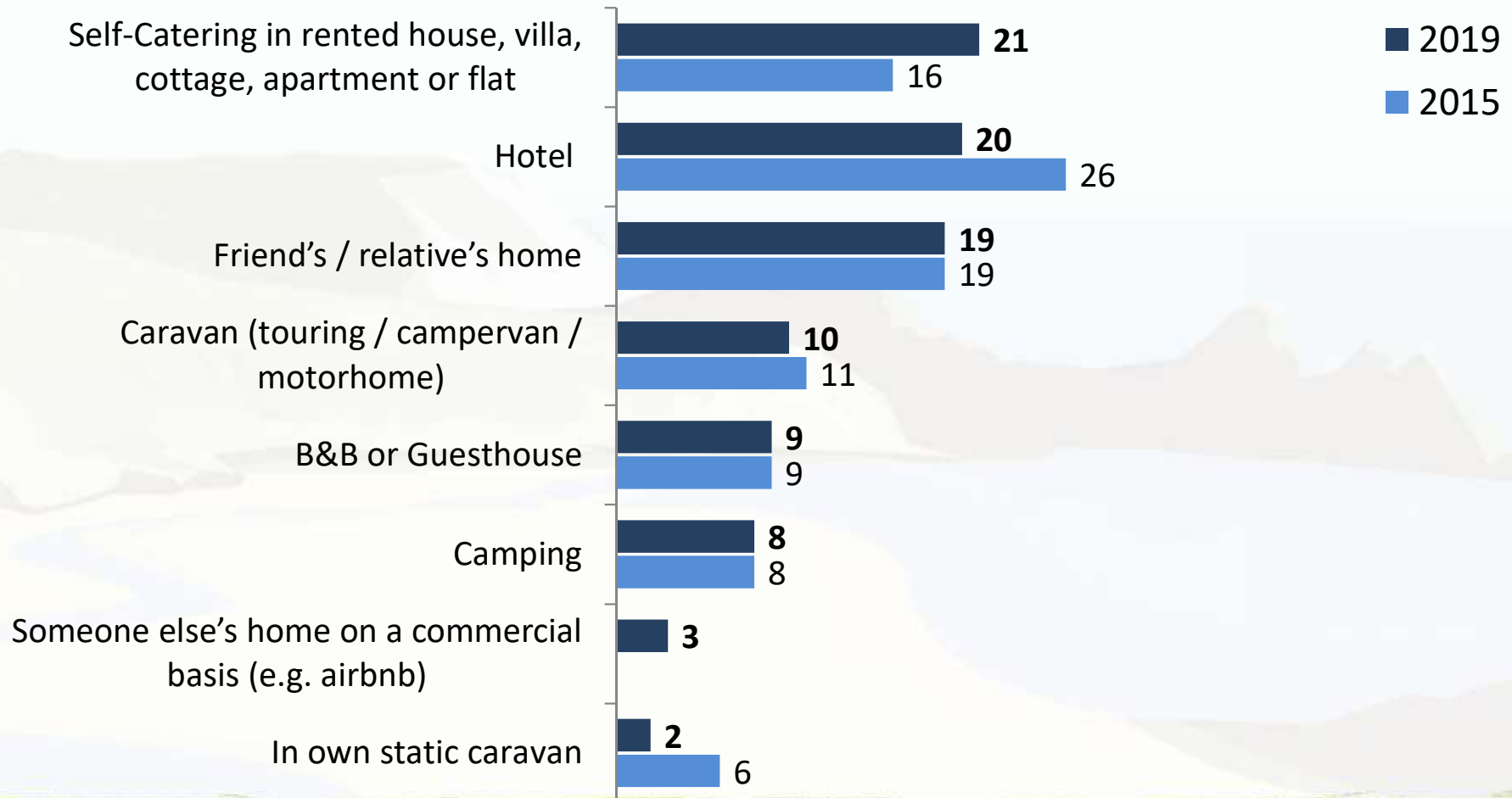
Overnight Visitors

Q. Which area are you staying in? (%)



Overnight Visitors

Accommodation type (%)

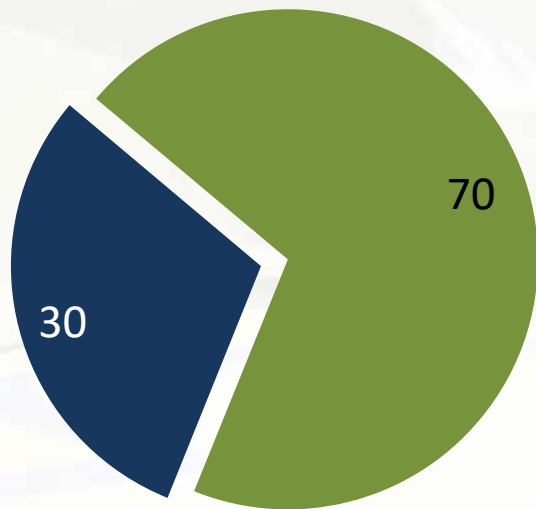


Visit Frequency

86% of visitors from outside Wales, have visited Wales before

First trip to Swansea Bay?

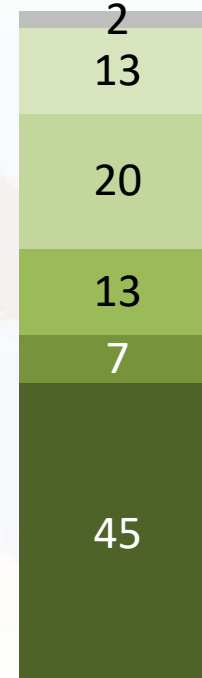
- Yes
- No



Welsh Residents = 13%
Outside Wales = 44%

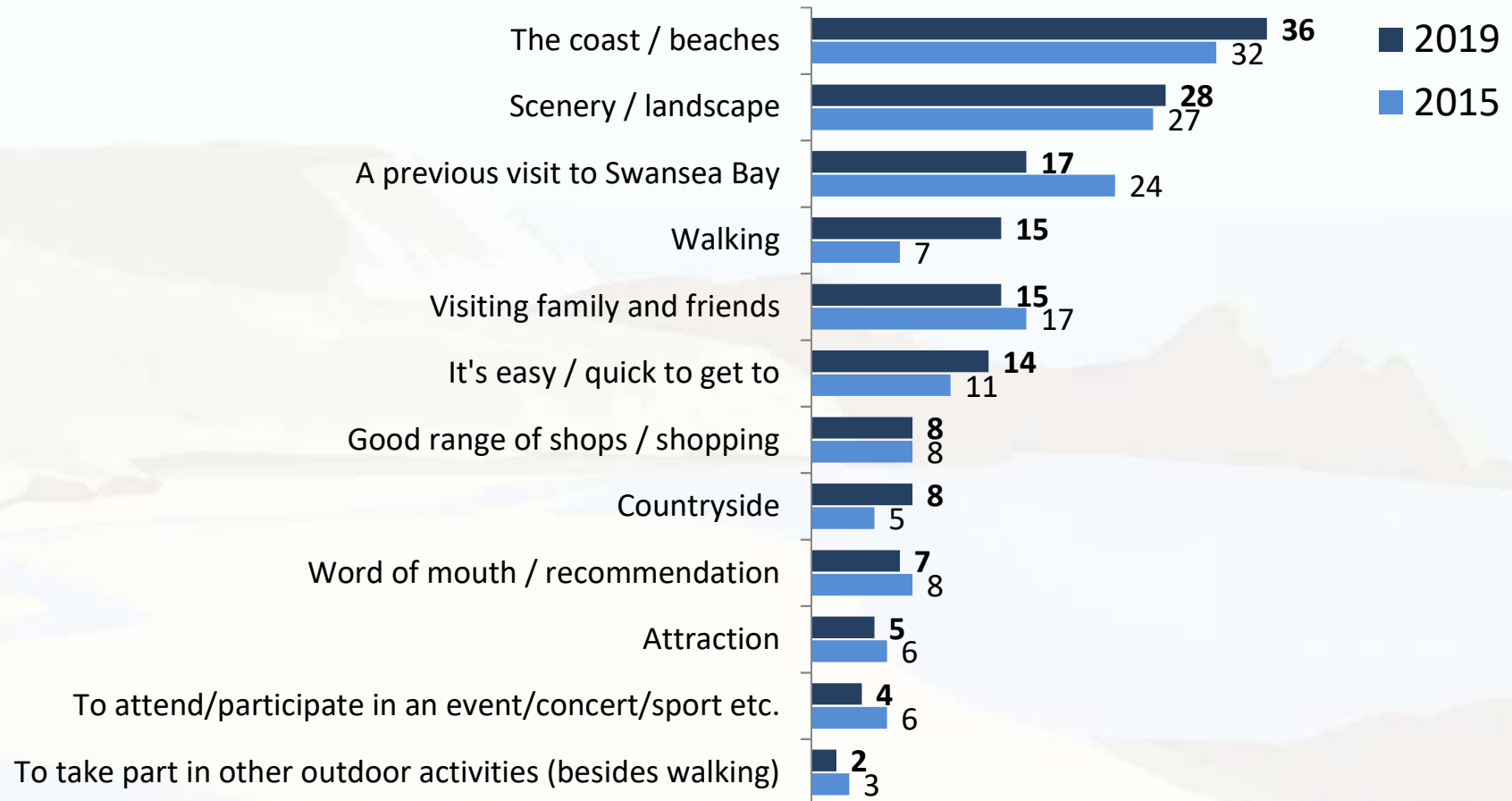
No. of times visited in last 3yrs

- Can't remember
- Once in three years
- 2-3 times
- 4-6 times
- 7-10 times
- More than 10 times



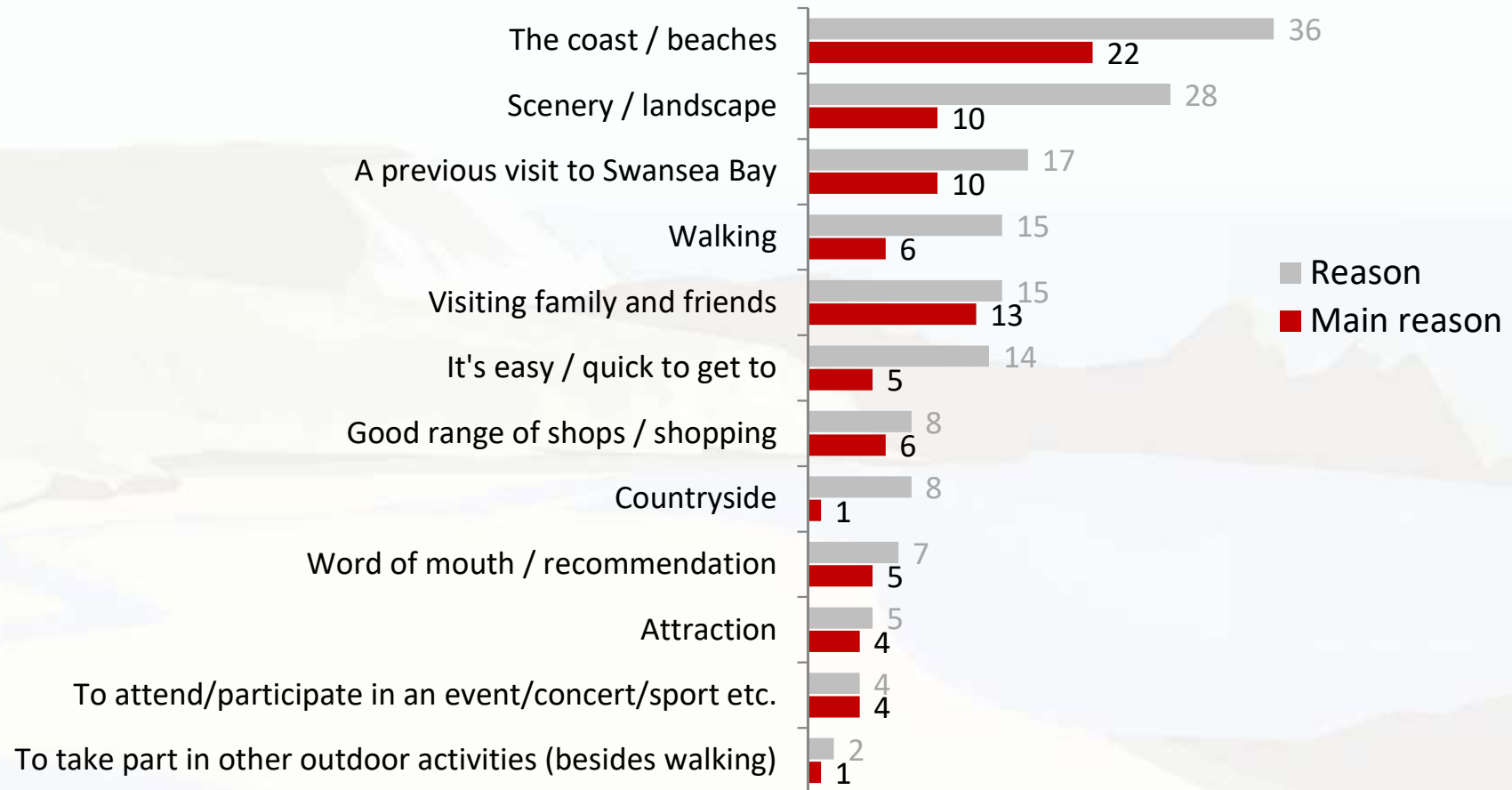
Influences

Which of these influenced your decision to visit? (%)



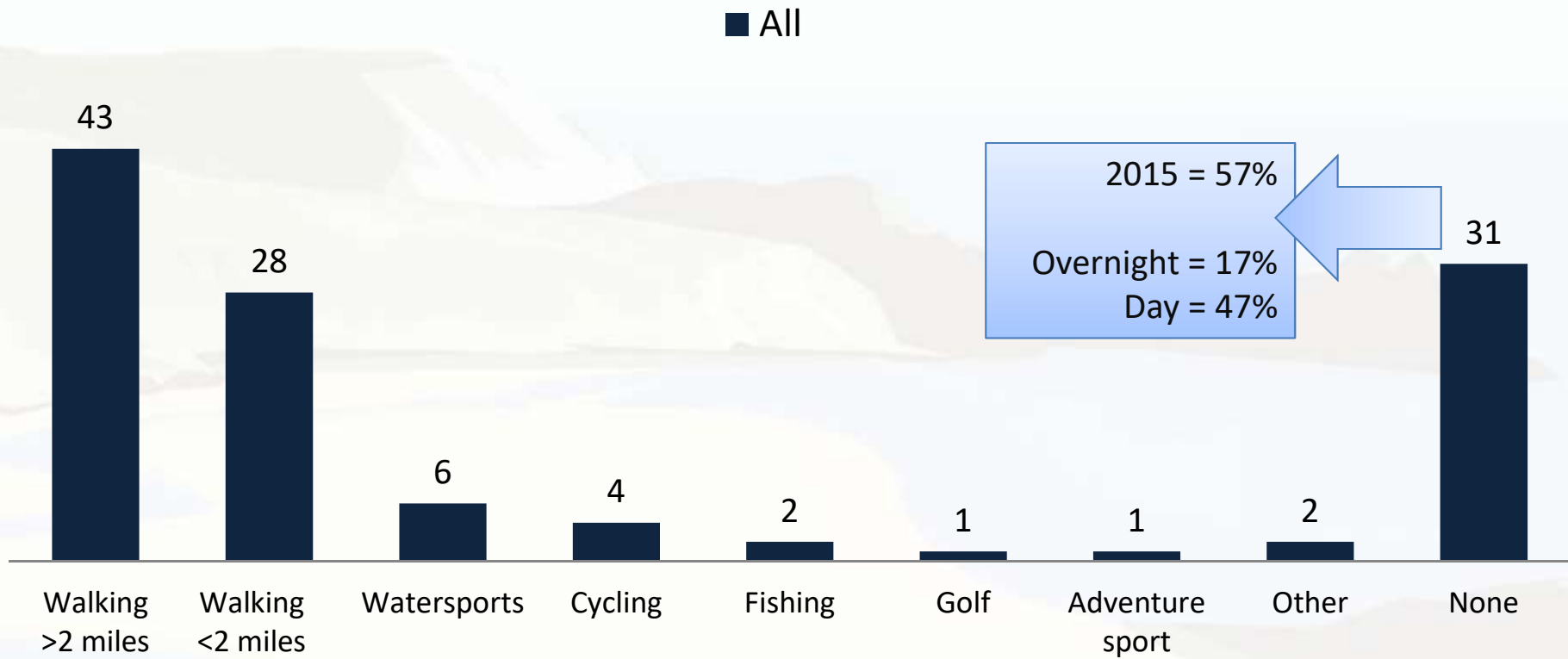
Influences

Which of these influenced your decision to visit / which ONE was your main reason? (%)



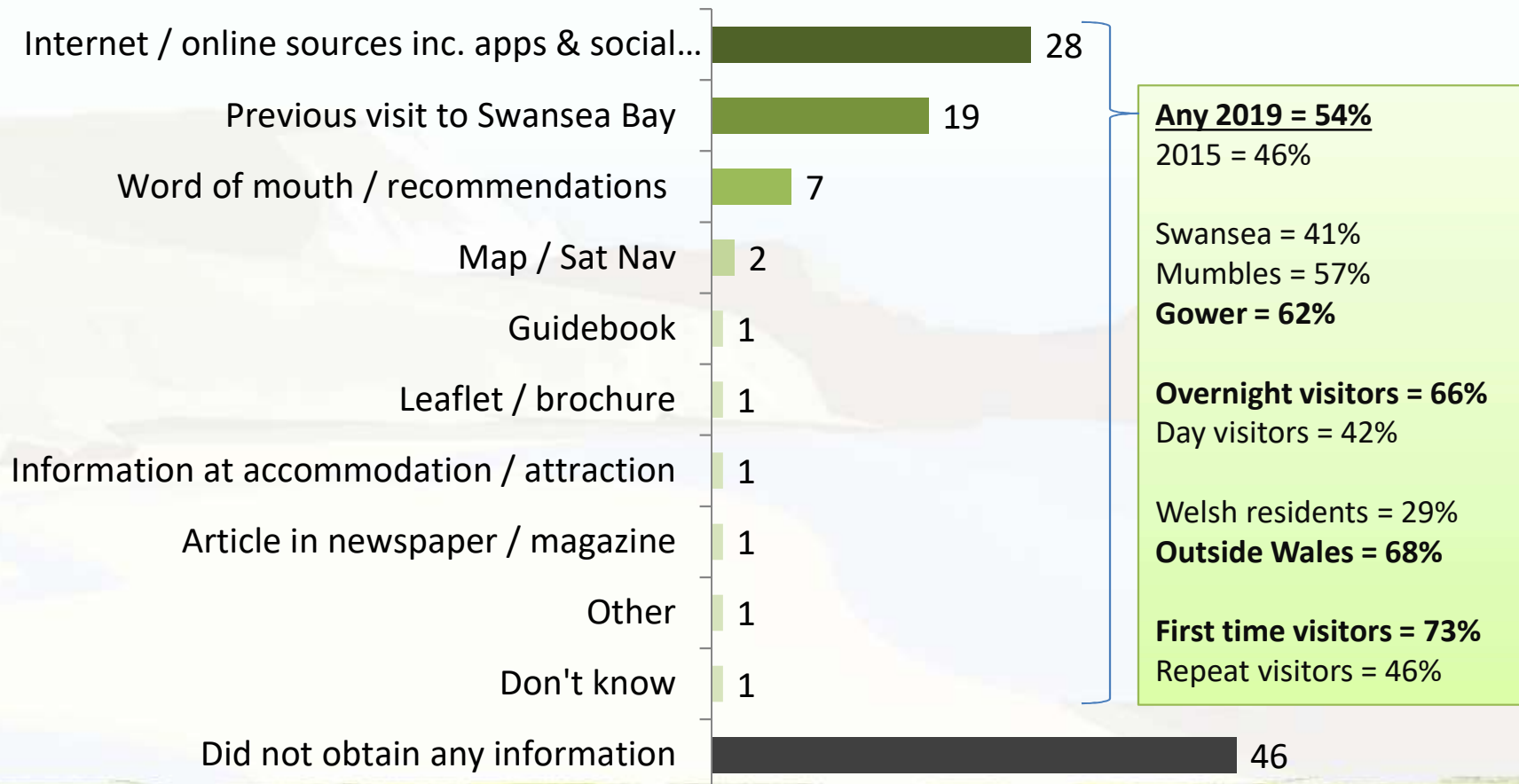
Activities

Have you/do you intend to take part in any of the following activities during your visit? (%)



Pre-Visit Information

Where did you consult for information on the area to help plan your trip? (%)



Expectations

- 18% rated their visit as much better than expected
- 18% a little better than expected
- 61% same as expected (high level of repeat visitors)
- 3% not quite as good as expected
- Expectations were higher amongst first time visitors

Enjoyment

- 68% rated their visit as very enjoyable (slightly higher than 2015)
- 31% enjoyable

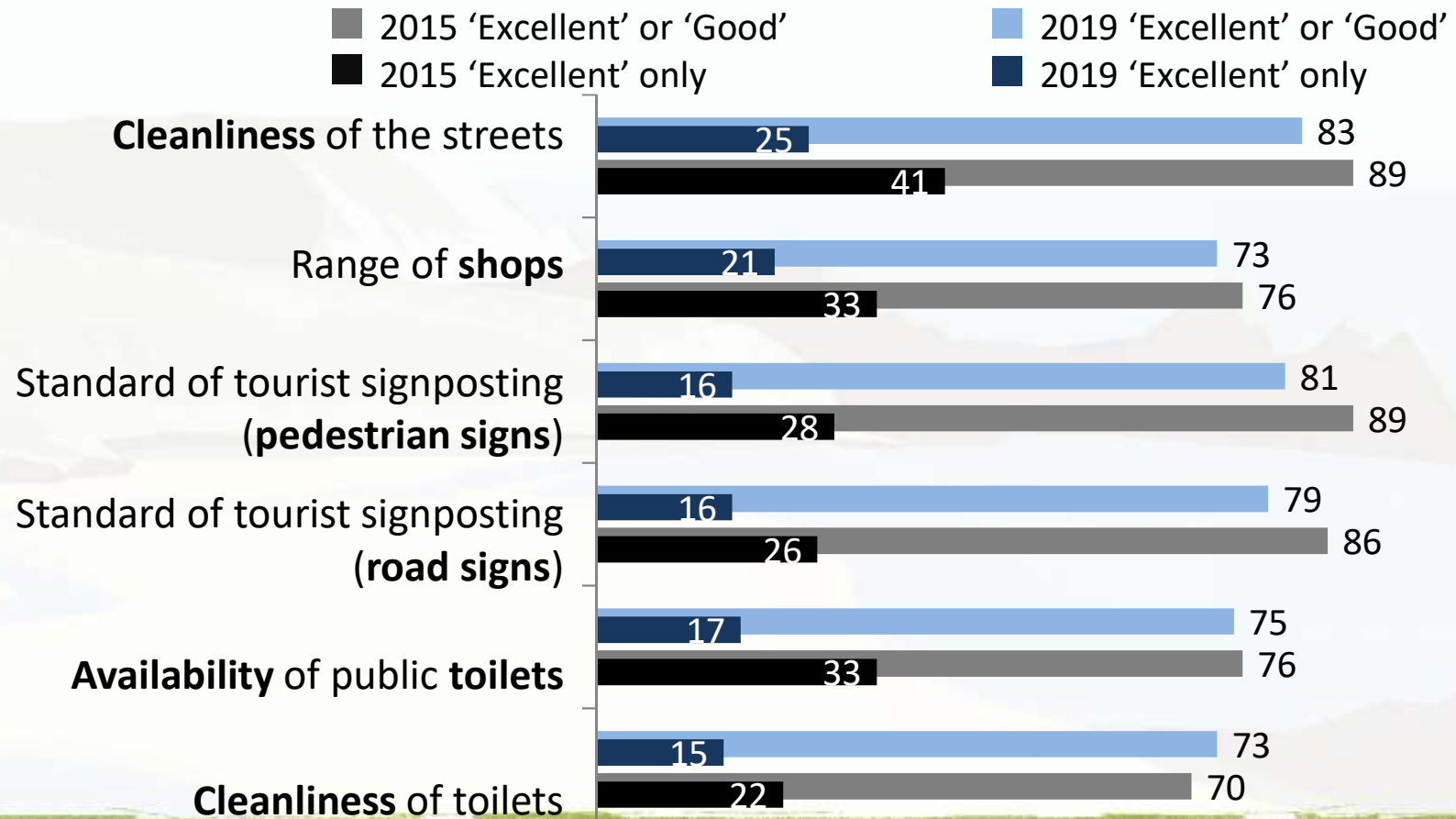
Ratings – 2015 vs. 2019 (1/2)

How would you rate the following aspects of your visit today? (%)



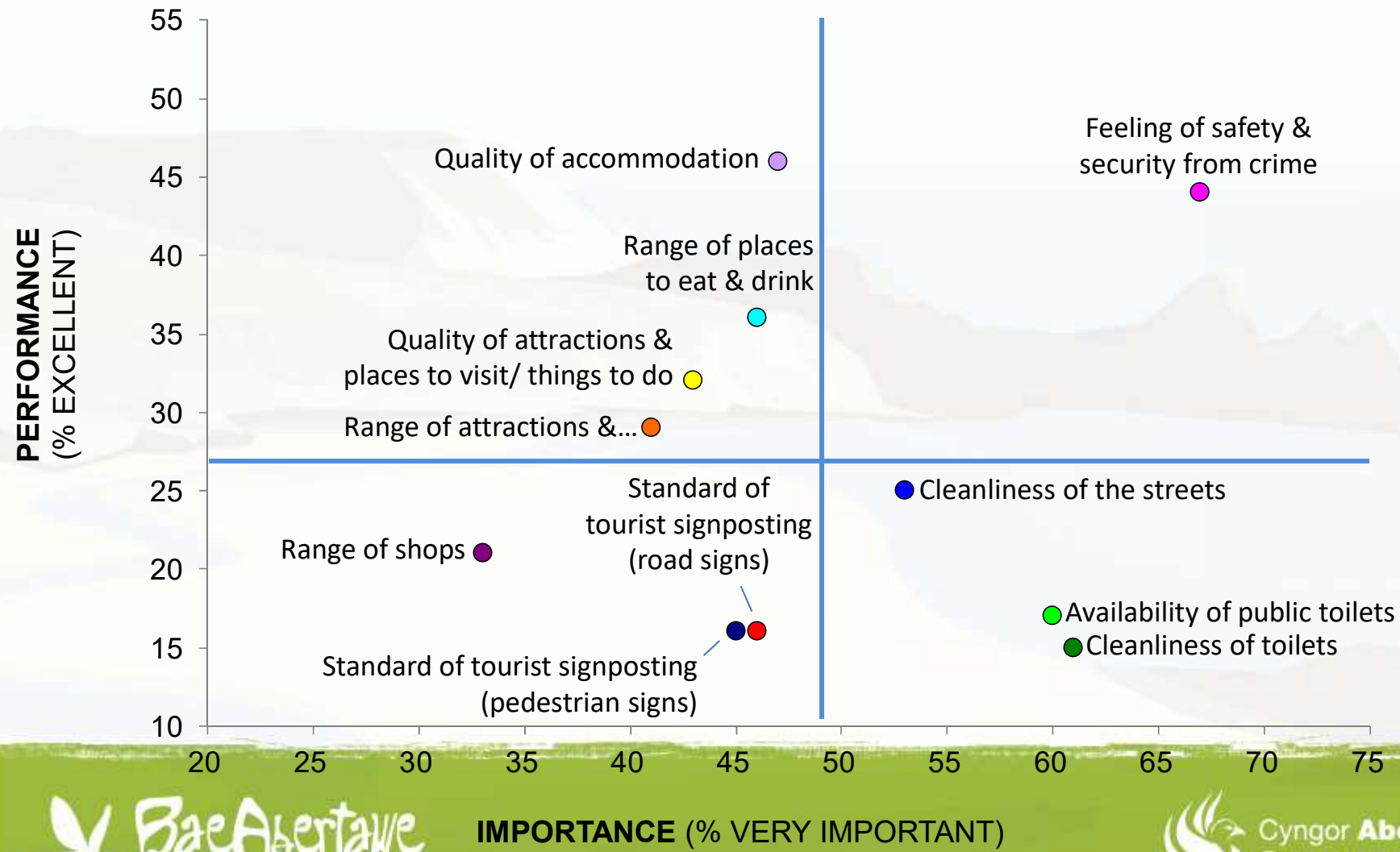
Ratings – 2015 vs. 2019 (2/2)

How would you rate the following aspects of your visit today? (%)



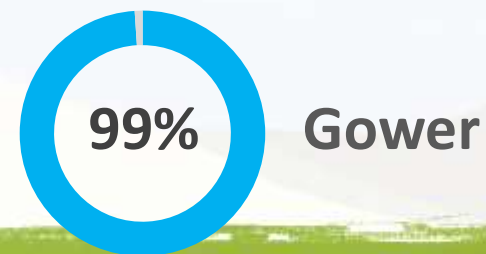
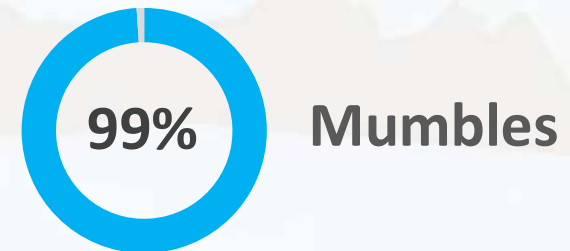
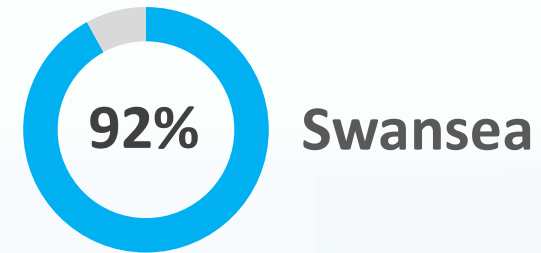
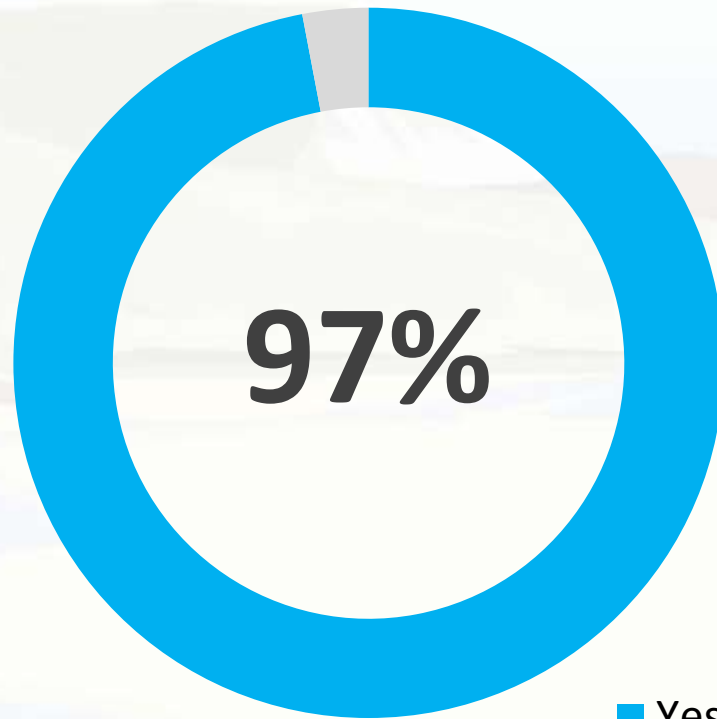
Strategic Improvement Matrix

All



Recommendation

Would you recommend a visit to Swansea Bay to someone else?



Summary of Findings

- Slight increase in the proportion of visitors coming from outside Wales since 2015 & almost half of all visitors stay overnight in the area.
- Most popular type of accommodation - self-catering, similar proportions opt for a hotel, or are staying with friends/relatives.
- 7 in 10 are on a repeat visit to the area, and more than half of these will be familiar with the area, having visited 7+ times in the last 3 years.
- A broad mix of visitor group types, profile varies considerably by location.
- Average spend has increased since 2015 – possibly driven by:
 - slight increase in overnight visitors
 - longer stays
 - Inflation
 - increased spend on accommodation.

Summary of Findings

- The coast, beaches, scenery & landscape – remain key attractions to Gower (and Mumbles), motivations more mixed for those in Swansea (influences also include proximity and shops).
- Activities are important - particularly in Gower/Mumbles.
- Information sources dominated by the internet and when prompted almost 1 in 10 visitors had used visitswanseabay.com
- Visitors generally positive when rating aspects of visit, but some notable declines in 'excellent' ratings for cleanliness and availability of public toilets (in Swansea/Mumbles in particular).
- Overall, visitors are highly complimentary about their visit. (97% would recommend)

Thank you

