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

- **On a day trip from home**: 40% (2015), 38% (2019)
- **For a short break (1 to 3 nights)**: 24% (2015), 24% (2019)
- **For a holiday (4 to 7 nights)**: 17% (2015), 18% (2019)
- **On a day trip while staying in Wales**: 8% (2015), 8% (2019)
- **Visiting friends and/or relatives - staying overnight**: 4% (2015), 6% (2019)
- **For a holiday (8+ nights)**: 5% (2015), 4% (2019)
- **Visiting friends and/or relatives - day trip**: 1% (2015), 1% (2019)
- **On a day trip while staying outside Wales**: 20% (2015), 20% (2019)

**% Overnight**
- **2015**: 50%
- **2019**: 53%

18% of overnight visitors are from Wales (82% from outside Wales)
Q. Which area are you staying in? (%)
### Overnight Visitors

#### Accommodation type (%)

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>2019</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Catering in rented house, villa, cottage, apartment or flat</td>
<td>21</td>
<td>16</td>
</tr>
<tr>
<td>Hotel</td>
<td>20</td>
<td>26</td>
</tr>
<tr>
<td>Friend’s / relative’s home</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>Caravan (touring / campervan / motorhome)</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>B&amp;B or Guesthouse</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Camping</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Someone else’s home on a commercial basis (e.g. Airbnb)</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>In own static caravan</td>
<td>2</td>
<td>6</td>
</tr>
</tbody>
</table>
Visit Frequency

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

First trip to Swansea Bay?

- Yes: 30
- No: 70

No. of times visited in last 3yrs

- Can’t remember: 2
- Once in three years: 13
- 2-3 times: 20
- 4-6 times: 13
- 7-10 times: 7
- More than 10 times: 45

Welsh Residents = 13%
Outside Wales = 44%
Influences

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

- The coast / beaches: 36% (2019), 27% (2015)
- A previous visit to Swansea Bay: 17% (2019), 14% (2015)
- Visiting family and friends: 15% (2019), 17% (2015)
- It's easy / quick to get to: 14% (2019), 11% (2015)
- Good range of shops / shopping: 8% (2019), 8% (2015)
- Countryside: 8% (2019), 5% (2015)
- To attend/participate in an event/concert/sport etc.: 5% (2019), 6% (2015)
- To take part in other outdoor activities (besides walking): 3% (2019), 6% (2015)
Which of these influenced your decision to visit / which ONE was your main reason? (%)

- The coast / beaches: 36 (
- Scenery / landscape: 28
- A previous visit to Swansea Bay: 17
- Walking: 15
- Visiting family and friends: 15
- It's easy / quick to get to: 14
- Good range of shops / shopping: 13
- Countryside: 12
- Word of mouth / recommendation: 7
- Attraction: 5
- To attend/participate in an event/concert/sport etc.: 4
- To take part in other outdoor activities (besides walking): 2
### Activities

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking &gt;2 miles</td>
<td>43%</td>
</tr>
<tr>
<td>Walking &lt;2 miles</td>
<td>28%</td>
</tr>
<tr>
<td>Watersports</td>
<td>6%</td>
</tr>
<tr>
<td>Cycling</td>
<td>4%</td>
</tr>
<tr>
<td>Fishing</td>
<td>2%</td>
</tr>
<tr>
<td>Golf</td>
<td>1%</td>
</tr>
<tr>
<td>Adventure sport</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

- **All**: 2015 = 57%
- **Overnight**: 17%
- **Day**: 47%
**Pre-Visit Information**

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

- Internet / online sources inc. apps & social…: 28%
- Previous visit to Swansea Bay: 19%
- Word of mouth / recommendations: 7%
- Map / Sat Nav: 2%
- Guidebook: 1%
- Leaflet / brochure: 1%
- Information at accommodation / attraction: 1%
- Article in newspaper / magazine: 1%
- Other: 1%
- Don't know: 1%
- Did not obtain any information: 46%

**Any 2019 = 54%**

- 2015 = 46%
- Swansea = 41%
- Mumbles = 57%
- Gower = 62%

**Overnight visitors = 66%**
- Day visitors = 42%

**Welsh residents = 29%**
- **Outside Wales = 68%**

**First time visitors = 73%**
- Repeat visitors = 46%
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? (%)

<table>
<thead>
<tr>
<th>Aspect</th>
<th>2015 ‘Excellent’ or ‘Good’</th>
<th>2015 ‘Excellent’ only</th>
<th>2019 ‘Excellent’ or ‘Good’</th>
<th>2019 ‘Excellent’ only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of accommodation</td>
<td>46</td>
<td>52</td>
<td>90</td>
<td>90</td>
</tr>
<tr>
<td>Feeling of safety and security from crime</td>
<td>44</td>
<td>52</td>
<td>92</td>
<td>95</td>
</tr>
<tr>
<td>Range of places to eat and drink</td>
<td>36</td>
<td>42</td>
<td>89</td>
<td>92</td>
</tr>
<tr>
<td>Quality of attractions and places to visit/ things to do</td>
<td>32</td>
<td>43</td>
<td>88</td>
<td>91</td>
</tr>
<tr>
<td>Range of attractions and places to visit/ things to do</td>
<td>29</td>
<td>43</td>
<td>87</td>
<td>90</td>
</tr>
</tbody>
</table>
Ratings – 2015 vs. 2019 (2/2)

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

- **Cleanliness of the streets**: 2015 ‘Excellent’ or ‘Good’ - 25%, 2019 ‘Excellent’ or ‘Good’ - 83%; 2015 ‘Excellent’ only - 41%, 2019 ‘Excellent’ only - 89%
- **Range of shops**: 2015 ‘Excellent’ or ‘Good’ - 21%, 2019 ‘Excellent’ or ‘Good’ - 73%; 2015 ‘Excellent’ only - 33%, 2019 ‘Excellent’ only - 76%
- **Standard of tourist signposting (pedestrian signs)**: 2015 ‘Excellent’ or ‘Good’ - 16%, 2019 ‘Excellent’ or ‘Good’ - 81%; 2015 ‘Excellent’ only - 28%, 2019 ‘Excellent’ only - 89%
- **Standard of tourist signposting (road signs)**: 2015 ‘Excellent’ or ‘Good’ - 16%, 2019 ‘Excellent’ or ‘Good’ - 79%; 2015 ‘Excellent’ only - 26%, 2019 ‘Excellent’ only - 86%
- **Availability of public toilets**: 2015 ‘Excellent’ or ‘Good’ - 17%, 2019 ‘Excellent’ or ‘Good’ - 75%; 2015 ‘Excellent’ only - 33%, 2019 ‘Excellent’ only - 76%
- **Cleanliness of toilets**: 2015 ‘Excellent’ or ‘Good’ - 15%, 2019 ‘Excellent’ or ‘Good’ - 73%; 2015 ‘Excellent’ only - 22%, 2019 ‘Excellent’ only - 70%
Would you recommend a visit to Swansea Bay to someone else?

- Swansea: 92%
- Mumbles: 99%
- Gower: 99%

Overall, 97% would recommend a visit to Swansea Bay.
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