

# **Peaceful Places**

## MARKET RESEARCH

A snapshot of tourism in North Ceredigion

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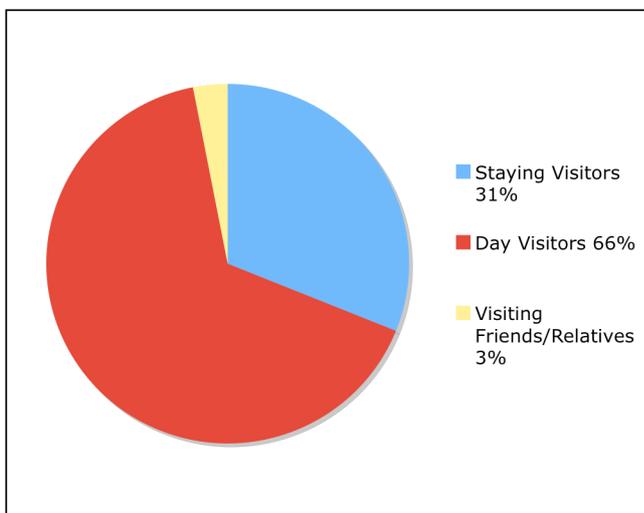
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# Who visits North Ceredigion?



Ceredigion attracts approximately 2.7 million visitors each year.<sup>1</sup> **The majority are day visitors** (requiring no accommodation), as shown in the figure below<sup>2</sup>:

TYPES OF VISIT



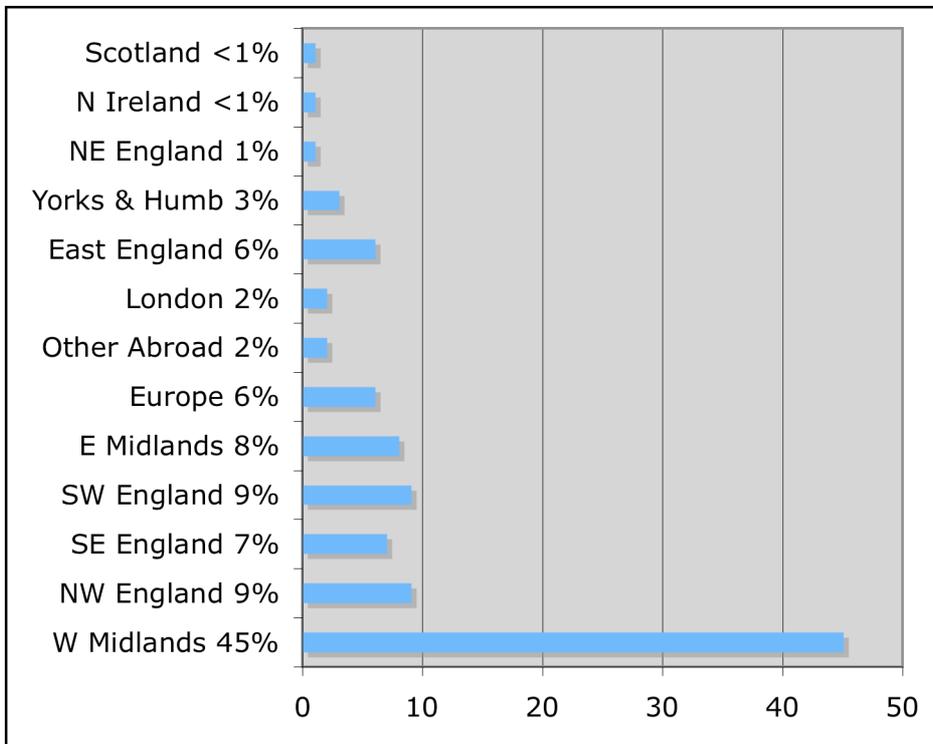
**The majority of visitors are from South Wales (60%),** with 37% coming from the rest of the UK and 4% from overseas<sup>11</sup>. Ceredigion attracts the greatest proportion of visitors from Wales in comparison to other destinations within the Mid Wales region (specifically Powys and Meirionnydd).<sup>11</sup>

<sup>1</sup> Ceredigion County Council (2009) *STEAM Report*

<sup>2</sup> Beaufort Research (2011) *Visit Wales Visitor Survey*. Tourism partnership Mid Wales

The majority of visitors from outside Wales come from the West Midlands. The fewest number of visitors come from Northern Ireland and Scotland (less than 1%), as shown below<sup>11</sup>:

ORIGIN OF VISITORS FROM OUTSIDE WALES



In terms of age and lifestage, the largest visitor group are ‘empty nesters’ (aged 55+, no children in household); the second largest group are families<sup>11</sup>:

VISITOR LIFESTAGES

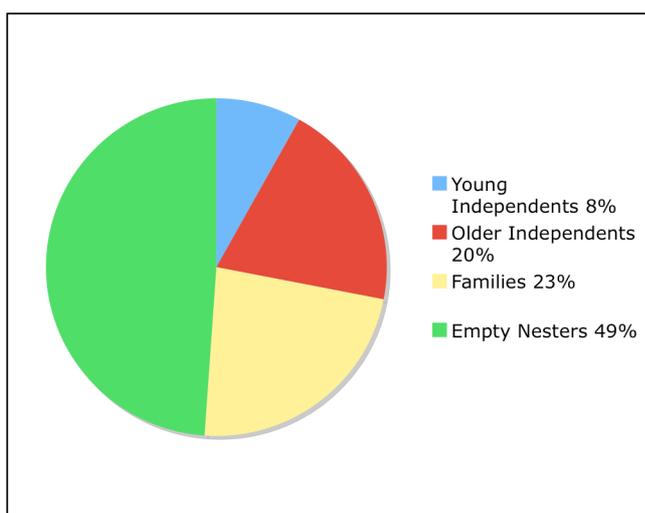


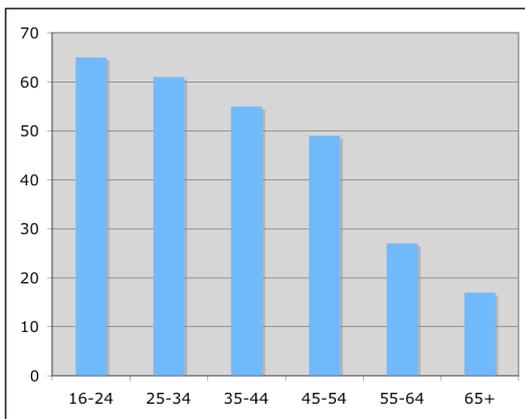
FIGURE KEY: *Young Independents* (aged under 35, no children in group); *Older Independents* (aged 35-54, no children in group); *Families* (adults with children); *Empty Nesters* (aged 55+, no children in group). Based on lifestyle segmentation used by Visit Wales<sup>11</sup>.

In terms of socio-economic status, **the majority of visitors are professional and non-manual workers** (67% ABC1), with the remainder classified as ‘skilled and unskilled manual occupations and non-working groups’ (33% C2DE). This profile is similar to Wales as a whole.<sup>5</sup>

**The majority of visitors do not have any disabilities in their immediate party** (86%). The most frequently mentioned disability is mobility, with 7% of visitors to Mid Wales having someone in their group with mobility issues.<sup>11</sup>

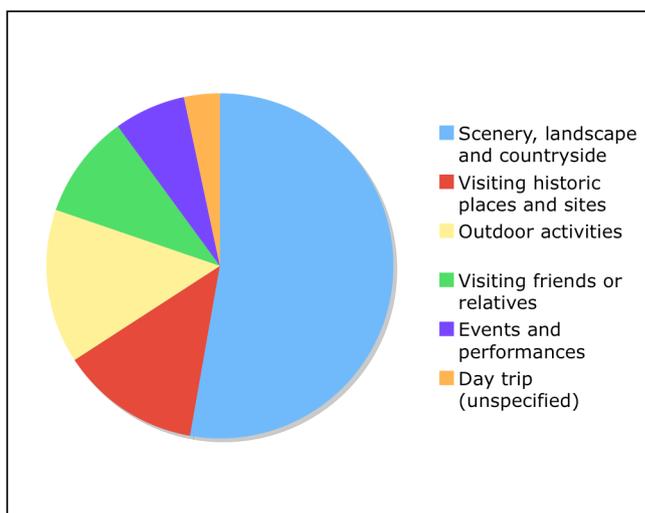
Based on data from 2011, approximately **41% of visitors have access to the internet during the trip** (either via a mobile or other handheld device). Of those that have access, **17% use the internet during the visit.**<sup>11</sup> It is important to note that internet usage varies considerably depending on visitor age, as shown below:

MOBILE INTERNET ACCESS DURING VISIT – BY VISITOR AGE (% of each group with access)



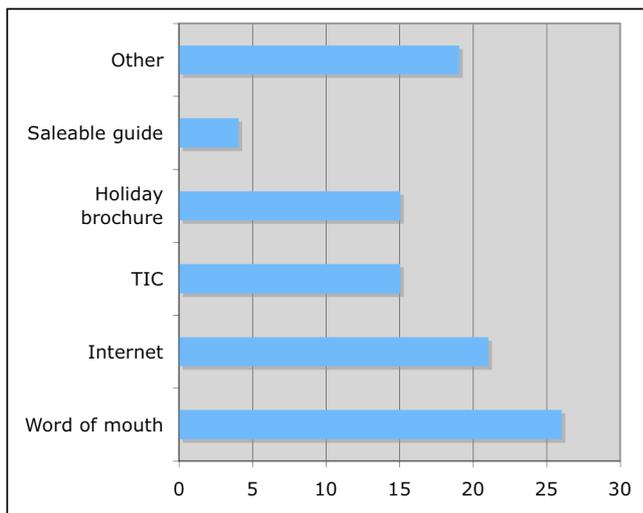
**Nearly half of visitors (48%) claim their main reason for visiting is to “enjoy the scenery/ landscape/ countryside”.** A summary of the most cited reasons for visiting is shown below<sup>11</sup>:

MAIN REASON FOR VISITING CEREDIGION



**The vast majority of visitors to Ceredigion have prior experience of visiting Wales (89%).<sup>11</sup>**

**Word of mouth is the primary source of information** used by visitors to find out about Ceredigion, **followed by the Internet**. The full range of information sources are shown below. *Please note this data is from 2003 (the most recently available) and may not be a true reflection of information sources currently used by visitors, which are likely to show an increase in Internet usage based on comparative data for Wales as a whole.<sup>3</sup>*



Research indicates that **the majority of visitors want to explore on their own, with little/no staff facilitation (62%)**. On-site technology is not a priority for most visitors, with data suggesting that **fewer than 20% of visitors wish to interact with a computer during excursions**. Parents in particular express a desire for places where their children can be "unplugged".<sup>4</sup>

**“Quality of the natural environment” and “friendliness of people” are the most highly rated aspects of people’s visits to Ceredigion**. The more commercial aspects of people’s visits (places to eat and drink, shopping) are less positively rated by comparison – but are still very much in positive territory with mean scores of around 8/10.<sup>11</sup>

**The majority of visitors feel that Ceredigion gives them a “strong Welsh experience” (42%)**, which is a higher proportion than in other areas of Mid Wales (specifically Powys and Meirionnydd). A similar majority of visitors (47%) cite the “Welsh experience” as being an important aspect of their trip (this figure is again higher than elsewhere in Mid Wales).<sup>11</sup>

It should be noted that **the local catchment population for Ceredigion is relatively small**. There are just 225,000 people within one hour’s drive of Aberystwyth<sup>5</sup>. That is not to say that the local market should not be overlooked as a source of visitors to *Peaceful Places* – particularly in light of the area’s strong sense of cultural heritage and the need to encourage visits off-season.

<sup>3</sup> University of Wales, Aberystwyth (2003) *Ceredigion Visitor Attitude Survey*. Ceredigion County Council.

<sup>4</sup> Museum Audience Insight (2010) *Interpretation Preferences Survey*