

Peaceful Places

MARKET RESEARCH

A snapshot of tourism in North Ceredigion

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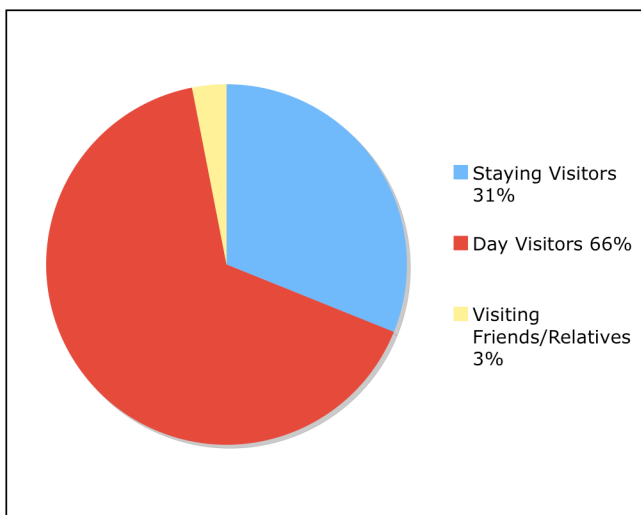
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Who visits North Ceredigion?



Ceredigion attracts approximately 2.7 million visitors each year.¹ **The majority are day visitors** (requiring no accommodation), as shown in the figure below²:

TYPES OF VISIT



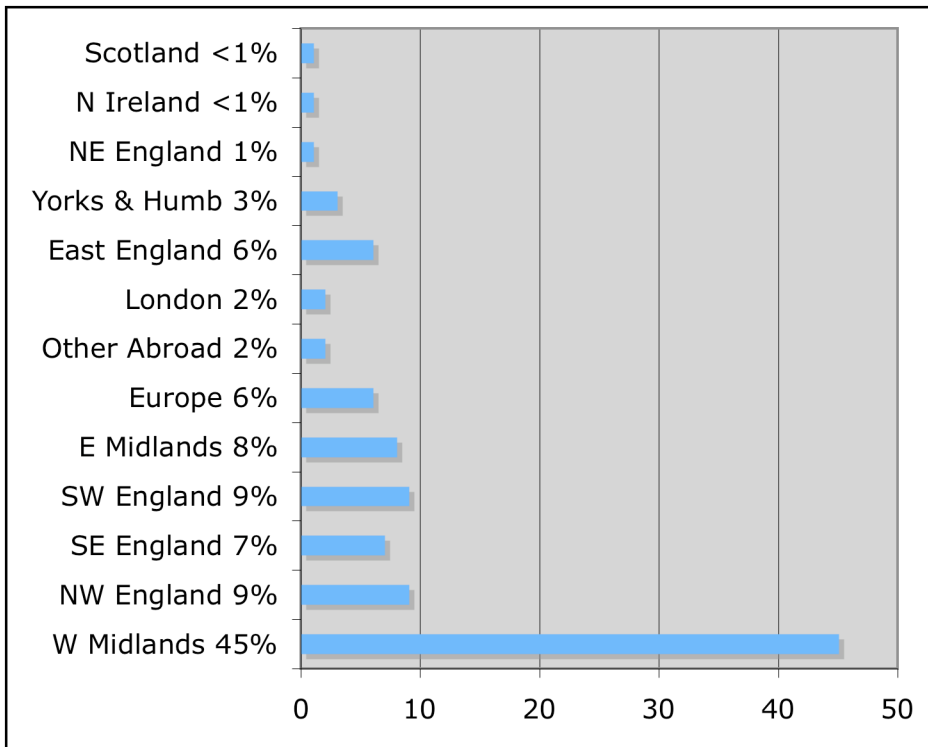
The majority of visitors are from South Wales (60%), with 37% coming from the rest of the UK and 4% from overseas¹¹. Ceredigion attracts the greatest proportion of visitors from Wales in comparison to other destinations within the Mid Wales region (specifically Powys and Meirionnydd).¹¹

¹ Ceredigion County Council (2009) *STEAM Report*

² 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 below¹¹:

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 families¹¹:

VISITOR LIFESTAGES

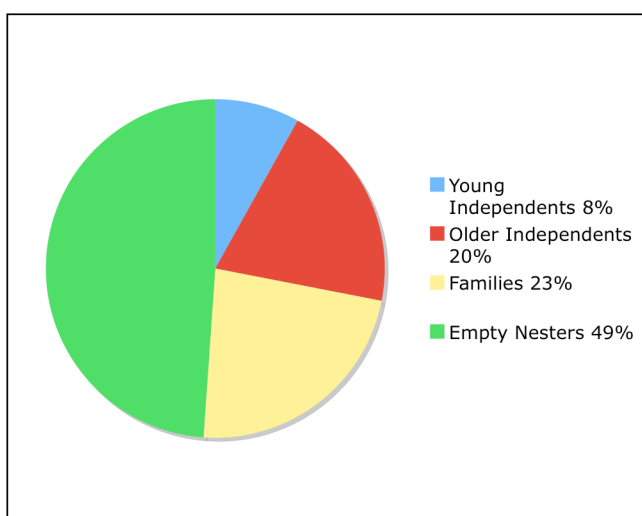


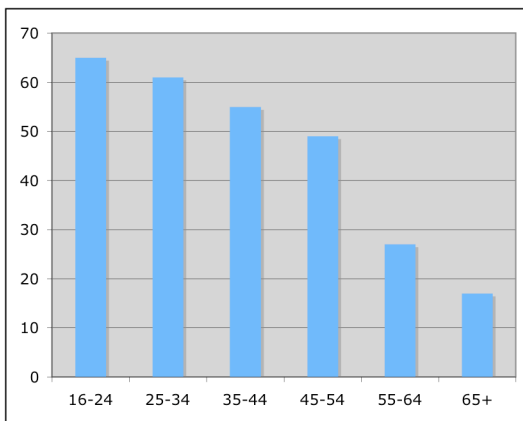
FIGURE KEY: *Young Independents* (aged under 35, no children in group); *Older Independents* (aged 35-54, no children in group); *Families* (adults with children); *Empty Nesters* (aged 55+, no children in group). Based on lifestyle segmentation used by Visit Wales¹¹.

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.⁵

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.¹¹

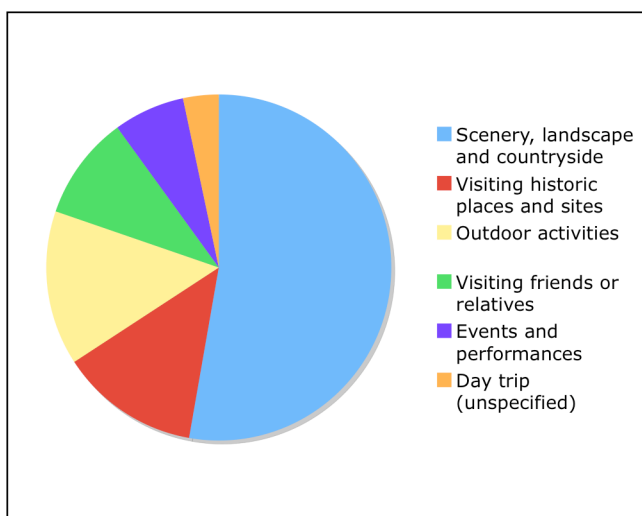
Based on data from 2011, approximately **41% of visitors have access to the internet during the trip** (either via a mobile or other handheld device). Of those that have access, **17% use the internet during the visit**.¹¹ It is important to note that internet usage varies considerably depending on visitor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

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



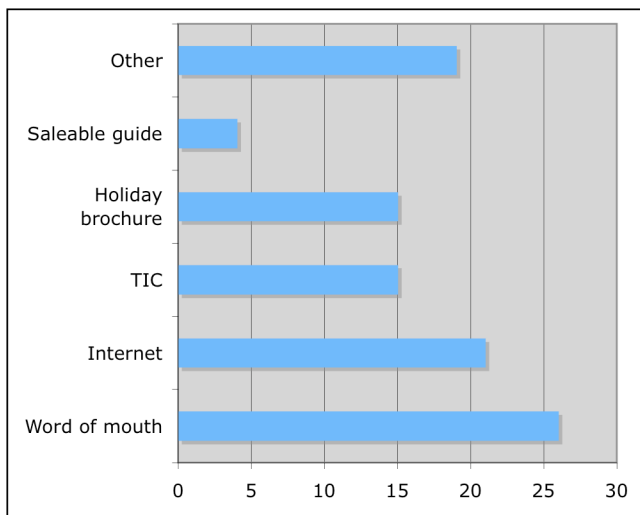
Nearly half of visitors (48%) claim their main reason for visiting is to “enjoy the scenery/ landscape/ countryside”. A summary of the most cited reasons for visiting is shown below¹¹:

MAIN REASON FOR VISITING CEREDIGION



The vast majority of visitors to Ceredigion have prior experience of visiting Wales (89%).¹¹

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.³*



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".⁴

“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 8/10.¹¹

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).¹¹

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 Aberystwyth⁵. 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.

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

⁴ Museum Audience Insight (2010) *Interpretation Preferences Survey*