

**CORNWALL VISITOR SURVEY
2012**

FINAL REPORT

January 2013



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Prepared for: **Visit Cornwall**
Client Contact: Emma Rojano

Prepared by: **Beaufort Research**
Agency contact: Claire Peate

2 Museum Place
Cardiff
CF10 3BG

Tel: (029) 37 6740
Fax: (029) 2037 0600
E-mail: enquiries@beaufortresearch.co.uk
Website: www.beaufortresearch.co.uk

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1. INTRODUCTION AND OBJECTIVES

1.1 Background and objectives

In February 2012 Visit Cornwall commissioned Beaufort Research to conduct the Cornwall Visitor Survey for 2012. The survey repeated – and built on – research conducted in previous years in the county.

The research assists Visit Cornwall in its understanding of visitor's expectations, experiences and needs in the region and helps them in their work with other tourism organisations in delivering a targeted tourism product.

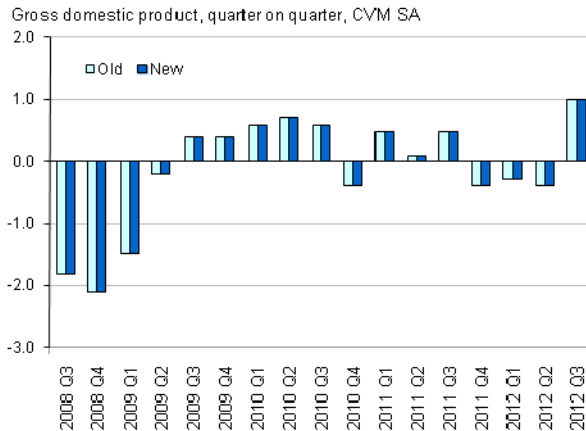
Specific objectives were:

- Provide a **profile** of the types of visitor coming to Cornwall
- Measure the visitor's **trip experience** against expectations
- Understand the **decision making process** including information sources pre and during the trip
- Explore **trip characteristics** such as transport use, accommodation and activities undertaken

The survey ran from 21st March – 31st December 2012. This report is the final report and is accompanied by a full set of data tabulations for the purposes of in depth analysis of the results.

1.2 Research context

The economic and climatic backgrounds to this research are given below – both of which contribute negatively to the UK tourism market.



Source: ONS

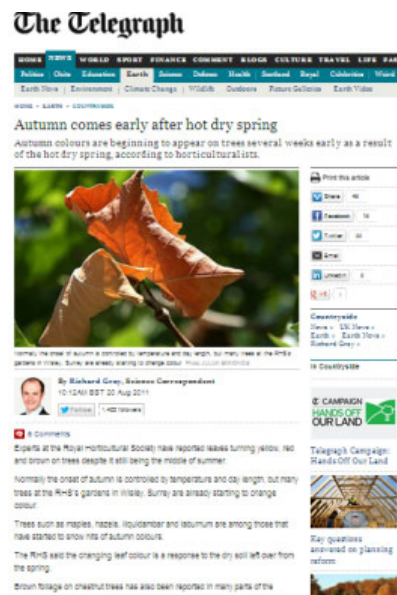
The negative growth between Q4 2011 and Q2 2012 came to an end in Q3 2012.

By the year end there was, however, talk of a potential *triple dip recession* on the horizon and businesses and consumers remain financially cautious.

As part of the ongoing financial situation the media continue to report on the subject of the Staycation – that is the substitution of a holiday abroad for a holiday within the UK.

Climatically, the UK weather in 2012 was heavily influenced by the abnormal position of the Jet Stream (which has been in a lower position than normal since 2007). Summer 2012 was referred to in the media as the “lost summer” being the **wettest summer in 100 years** and temperatures well below average.

By the year end the Met Office confirmed that 2012 was the **second wettest year on record**.



2. METHODOLOGY

2.1 Methodology summary

The research universe was classed as those aged 16 or over who live outside the county and are either as a Staying or Day Visitor.

A fifteen minute questionnaire was administered face-to-face across a number of locations in the county:

West Cornwall

Penzance
St Ives
Marazion
Lizard
Lands End

South Coast

Falmouth
Truro
Mevagissey
Charlestown
Fowey
Lostwithiel
Looe

North Coast

Perranporth
Newquay
Padstow
Wadebridge
Bude

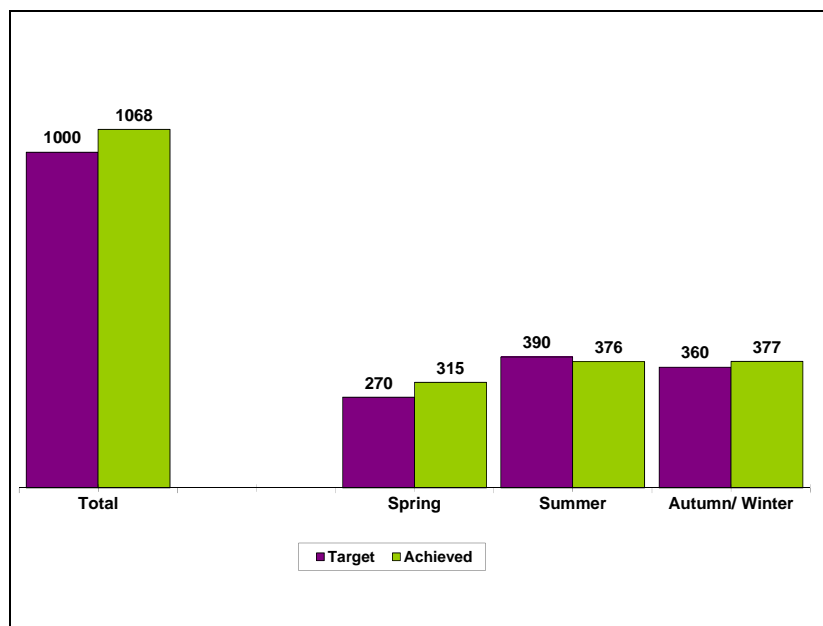
Bodmin Moor & Tamar Valley

Launceston
Liskeard
Bodmin
Minions

2.2 Summary of interviews achieved

The breakdown of interviews across the seasons is as follows:

Chart 1



3. KEY FINDINGS

- **Satisfaction with the trip is high**, with 84% of visitors Promoters. Not surprising given the high proportion of repeat visitors, for most the trip “met expectations”.
- **The majority don’t need information pre-visit.** For those that do need information (first-time visitors) the internet is most-mentioned source: accommodation sites are the most popular. With 91% of visitors to Cornwall on a repeat visit many visitors use previous experience to inform their current trip.
- The phenomenon of **Staycationing** (visitors who are substituting a holiday abroad for one in the UK) is introducing new visitors to the region: 17% on a Staycation have never visited Cornwall before compared to 6% who are not on a Staycation.
- **Anticipated spend during the trip is remaining fairly constant** regardless of the financial climate: around two thirds will spend the same or more on accommodation, things to do and food and eating out.
- **There is some appetite for the Oyster Card and Loyalty Schemes:** more so amongst the younger visitors than those in the older age groups.
- **The car still dominates travel**, with car-free days showing a year on year decline to 23% in 2012 (from 29% in 2010). The road network in Cornwall was very positively received as being able to handle the volume of traffic.

4. MAIN FINDINGS

4.1 VISITOR AND TRIP PROFILE

Including visitor profile, trip profiles, and destination choices.

4.1.1 Visitor Profile

Looking first at visitor origin, the vast majority of visitors to the county are from the UK (94%) with 4% of visitors from Europe and 2% from further afield. This is consistent with the findings from the 2011 and 2010 visitor surveys.

Visitors from the UK are drawn from most regions (see Map 1, below) with a stronger focus on the South West and South East and Midlands.

Map 1: Distribution of UK visitors to Cornwall



The UK distribution of visitors breaks down as follows:

- South West 28%
- South East (including London) 26%
- West Midlands 13%
- North West England 8%
- Yorkshire and Humberside 5%
- East of England 5%
- Wales 5%
- Scotland 1%
- North East England 1%

From overseas the countries with the most visitors to Cornwall were Germany (32% of overseas visitors) and USA/ Canada (20%).

Looking solely at Day Visitors to Cornwall, not surprisingly the majority (91%) are from neighbouring Devon, again consistent with previous years.

The lifestage of the visitor to Cornwall was captured, using the following segmentation:

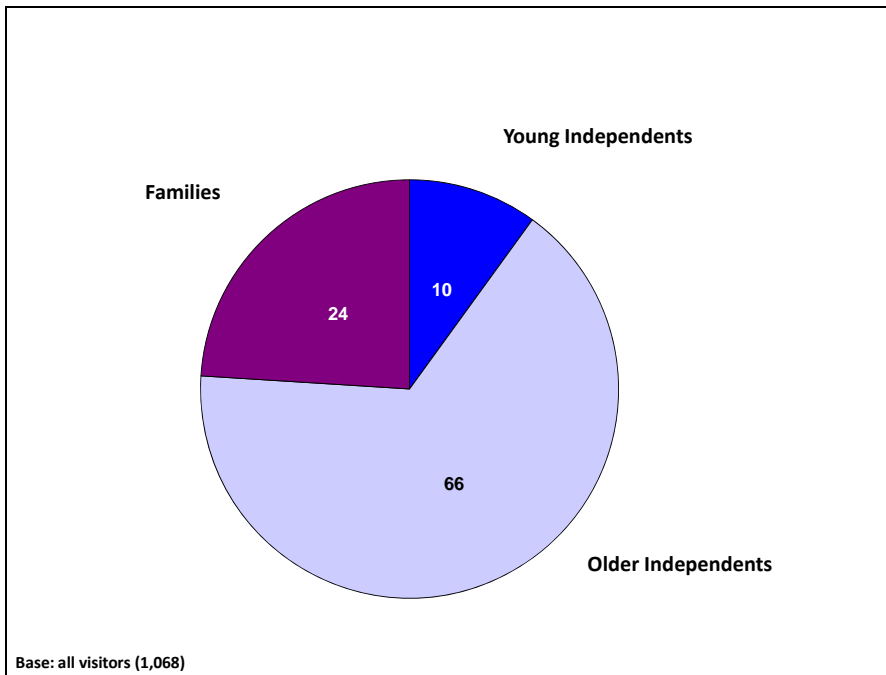
Young Independent: aged up to 34 years, no children in household

Older Independent: aged 35 years or more, no children in household

Families: children in household

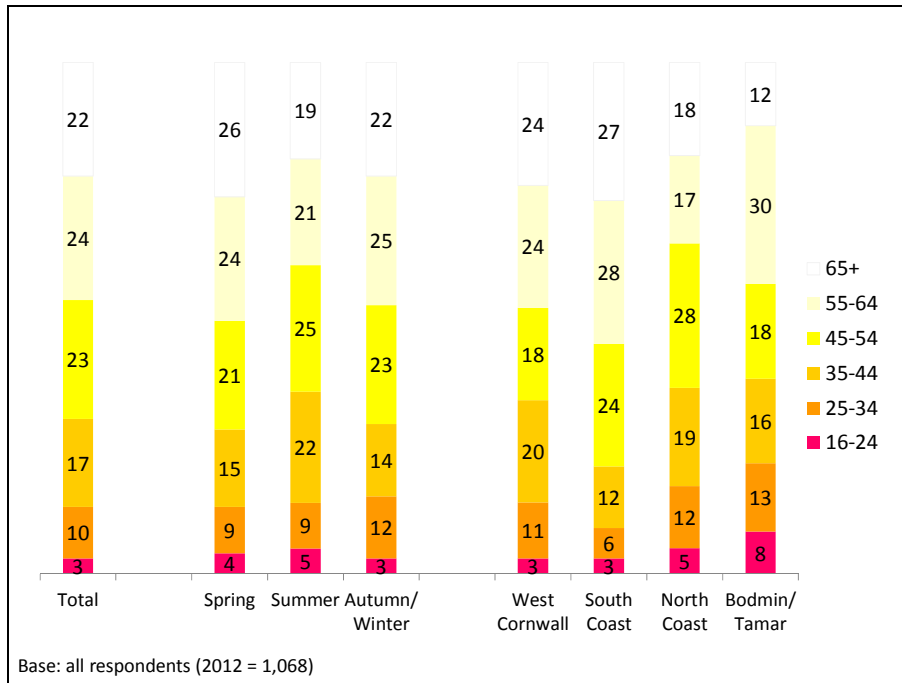
The chart below shows that *Older Independents* make up the majority of visitors to the region – accounting for two thirds (66%) of all visitors.

Chart 2: Lifestage of visitors to Cornwall



Turning to look specifically at the age of the visitor, the following chart shows the age breaks both for the total sample and also at a number of subsamples to demonstrate a variation to the profile of visitors to the region.

Chart 3: Lifestage of visitors to Cornwall



Looking regionally, in Bodmin Moor and Tamar Valley 21% of visitors are below the age of 34, compared to just 9% on the South Coast of Cornwall. In the summer months the rise of the mid-age-ranges (35-54) indicates the predominance of families during the school holidays: they account for 47% of visitors during the summer compared to 36% of visitors during the spring and 37% of visitors during the autumn/winter.

The social grade of visitors to Cornwall is given in the table below. Social grade is a classification based on occupation, used for over 50 years and is a market research industry standard for classification. The classifications are as follows:

- A Higher managerial, administrative and professional
- B Intermediate managerial, administrative and professional
- C1 Supervisory, clerical and junior managerial, administrative and professional
- C2 Skilled manual workers
- D Semi-skilled and unskilled manual workers
- E State pensioners, casual and lowest grade workers, unemployed and state benefits only.

The results show that the profile of visitors to Cornwall is heavily skewed towards the upper social grades: that is ABC1.

Table 1: Socio Economic Group - Stage I data

	UK Profile*	TOTAL	Region visited						
			Spring	Summer	Autumn/ Winter	West	South	North	Bodmin/ Tamar
ABC1	55%	69%	71%	71%	67%	69%	68%	68%	84%
C2DE	45%	30%	29%	29%	33%	31%	31%	32%	14%
Sample size	-	1,068	315	376	377	316	312	358	82

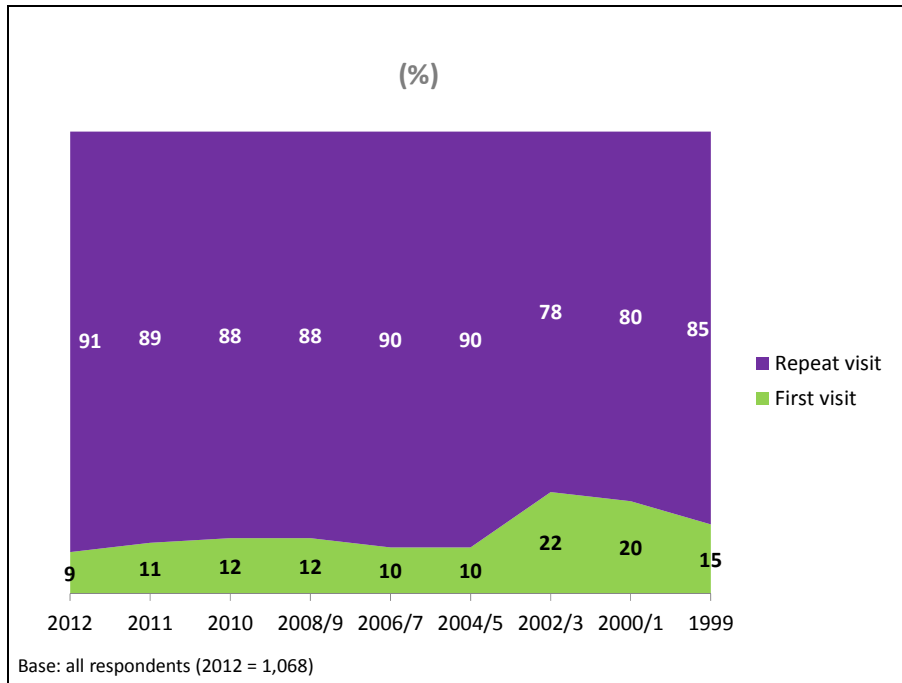
Base: all visitors

*Source: National Readership Survey 2010.

Ethnically Cornwall attracts a very limited ethnic mix of visitors with just 2% of visitors falling into non-white classifications.

Looking at visitors' previous experience of Cornwall, the vast majority of visitors (90%) are on a repeat visit with just 9% on a first time visit to the county. The summer period sees the highest proportion of first time visitors (where they account for 14% of visitors). The phenomenon of the *Staycation* appears to attract a higher proportion of new visitors to the region: 17% have not visited before compared to 6% who are not on a Staycation.

Chart 4: Proportion of new and repeat visitors

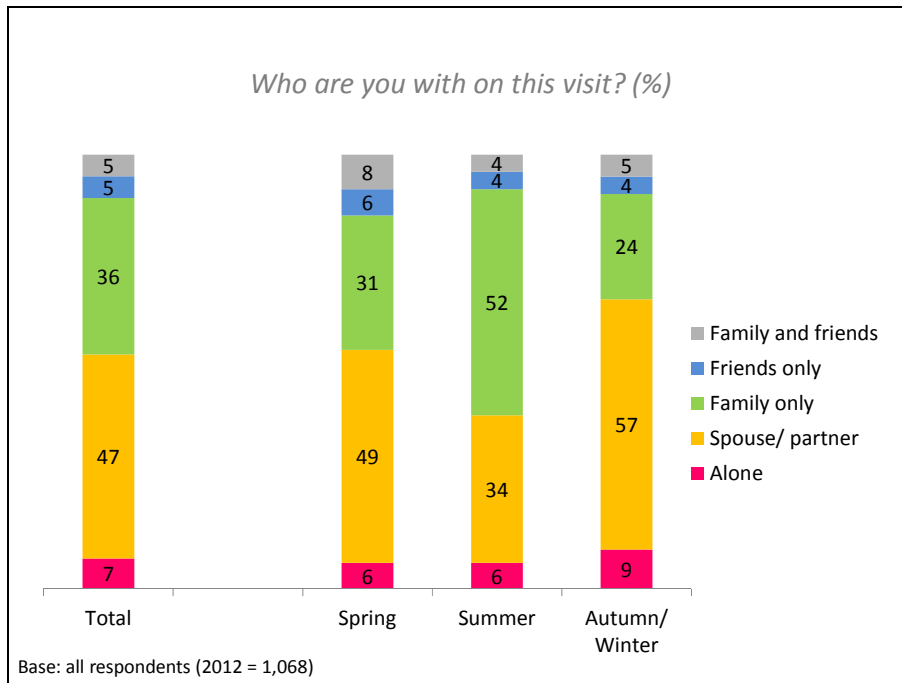


Amongst those who have been to Cornwall before the last visit was – for over half – within the previous twelve month period.

- Within the last month (7%)
- Within the last six months (22%)
- Within the last twelve months (28%)
- 1-2 years ago (15%)
- 3-4 years ago (8%)
- 5+ years ago (19%)

Looking at the visit party, nearly half (47%) are on a trip with a spouse/ partner: highest in the autumn/ winter period (57%) and lowest during the summer months (34%) when Families dominate the profile.

Chart 5: Party composition

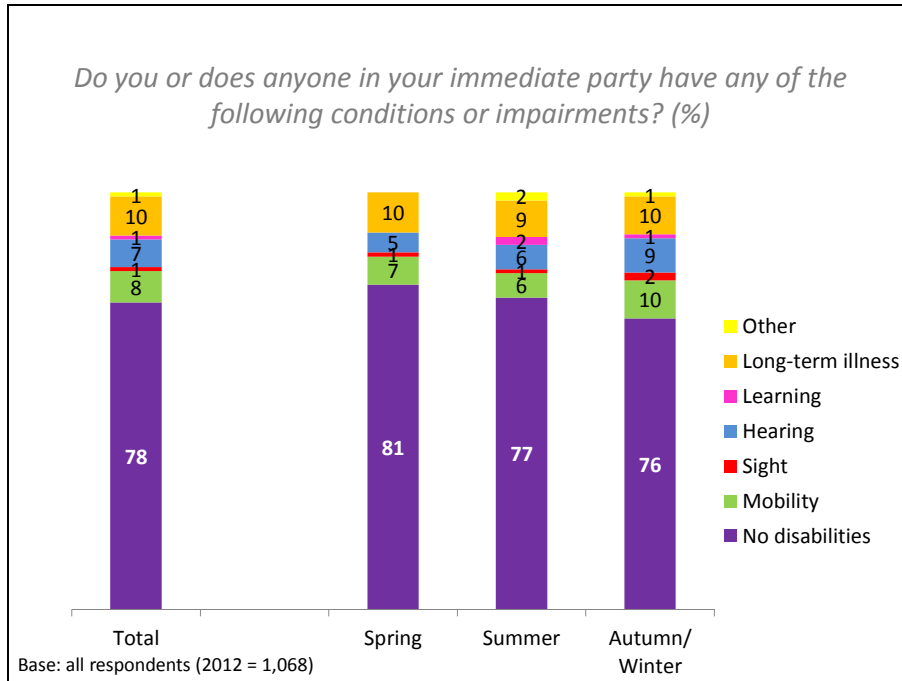


Over one in five visitors (22%) were on a trip with someone with a disability in their immediate party. A disability was classed as having conditions or impairments relating to:

- Mobility (including wheelchair use)
- Sight (either partial sight or blind)
- Hearing
- Learning
- Long-term illness (for example cancer, arthritis)

The chart below shows that the proportion on a trip to Cornwall with someone in the party with a disability increases as the year progresses: in autumn and winter nearly a quarter (24%) are with someone who has a disability.

Chart 6: Conditions or impairments in party



4.1.2 Trip Profiles

The main purpose of the trip for the majority of visitors to Cornwall was *leisure/ holiday* with over four in five (83%) on a *leisure/ holiday* trip to the region. The proportions *visiting friends and relatives* increases out of season: from 10% in the summer to 20% in the autumn/ winter. There are also differences in the region visited: those in the Bodmin/ Tamar area are more likely to be *visiting friends and relatives* (23% are doing so) compared to those in North Cornwall (just 9%).

Table 2: Main purpose of trip to Cornwall

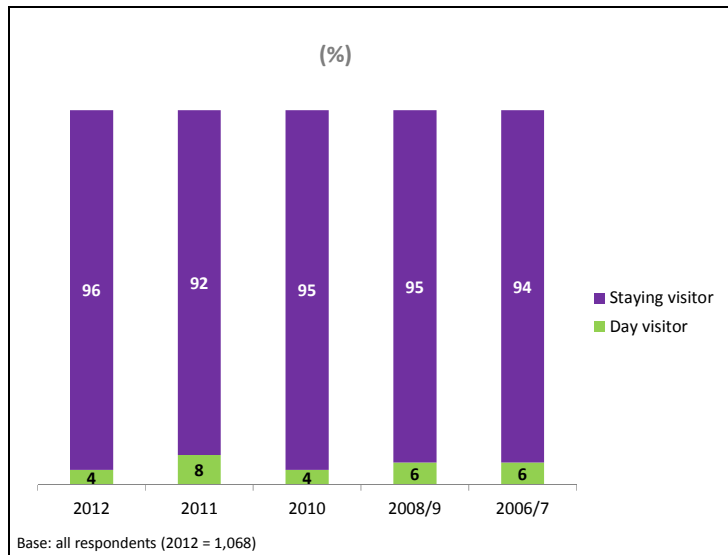
	TOTAL	Spring	Summer	Autumn/ Winter	Region visited			
					West	South	North	Bodmin/ Tamar
Leisure/ holiday	83%	85%	88%	77%	83%	80%	89%	72%
Visiting friends and family	15%	14%	10%	20%	16%	18%	9%	23%
Shopping trip	1%	1%	1%	1%	1%	0%	1%	5%
Business/ attending a conference	1%	1%	1%	1%	1%	2%	1%	0%
Sample size	1,068	315	367	377	316	312	358	82

Base: all Visitors

While the figures, above, remain consistent with previous waves of the Cornwall Visitor Survey there has been a slight increase in the proportions visiting friends and relatives (15% in 2012, up from 11% in 2011 and 9% in 2010).

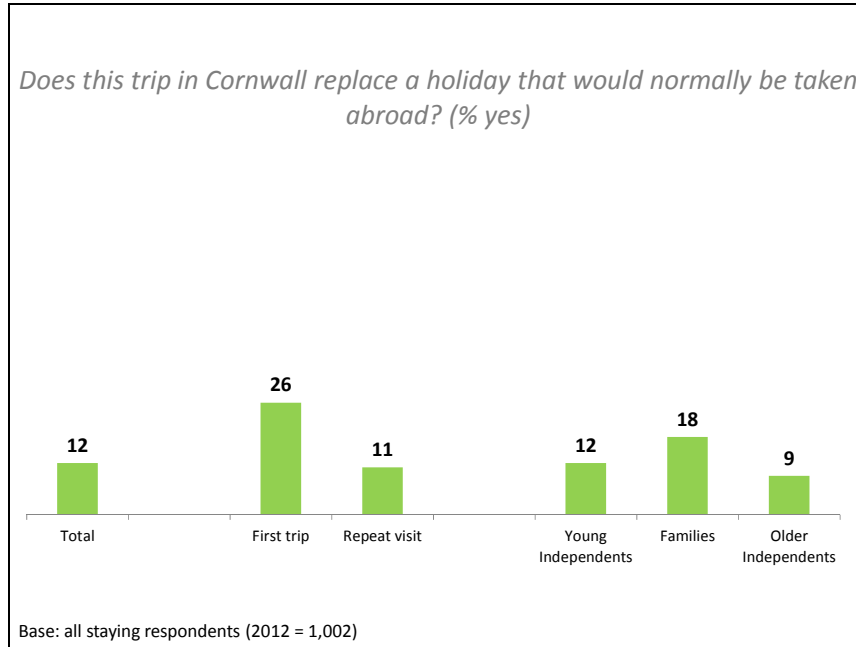
Turning to look at the type of trip being taken – that is whether it is a day or staying trip – the results are shown in the chart below and point to a marked focus on Staying Visitors, not surprising given the geographical situation of the county. The results show little change over time.

Chart 7: Proportion of day and staying visitors to Cornwall



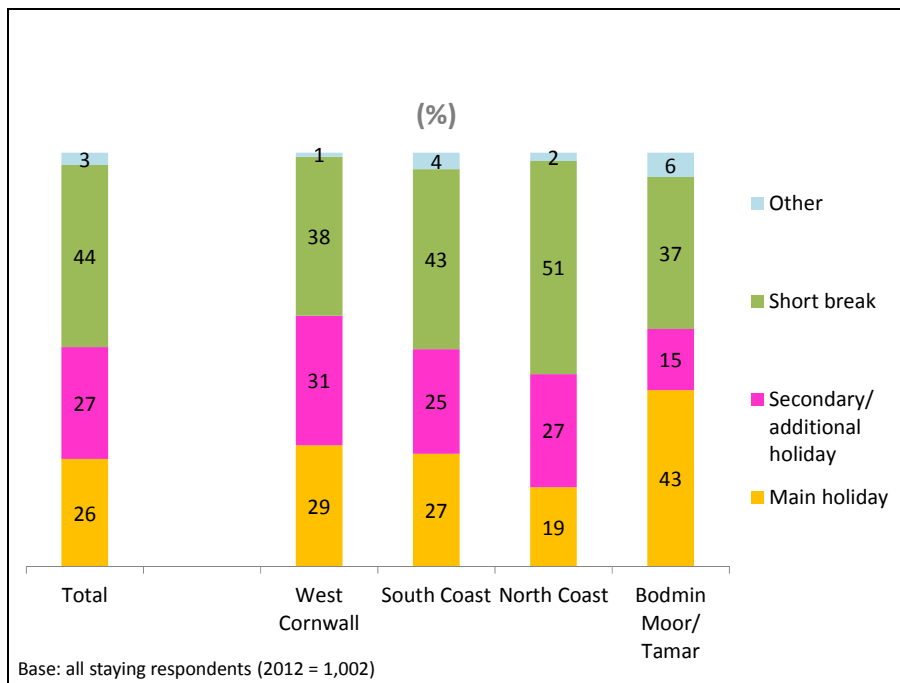
Staying Visitors from the UK were asked if they were on a Staycation – that is a holiday in the UK that would normally be taken abroad. Just over one in ten (12%) said they were on a Staycation: rising to nearly one in five over the summer period (18%). See chart following.

Chart 8: Proportion of Staycationers in Cornwall



In total over two in five (44%) classify themselves as on a *short break*: highest in the North Coast (51% are on a *short break*). See chart below.

Chart 9: Nature of trip



Those on a staying trip in the county were asked for the town nearest to where they were staying. The most-mentioned location was Newquay with 21% mentioning this as the nearest town (on a par with previous research waves in 2008/9 to 2011 when 19% of visitors stayed nearest to Newquay).

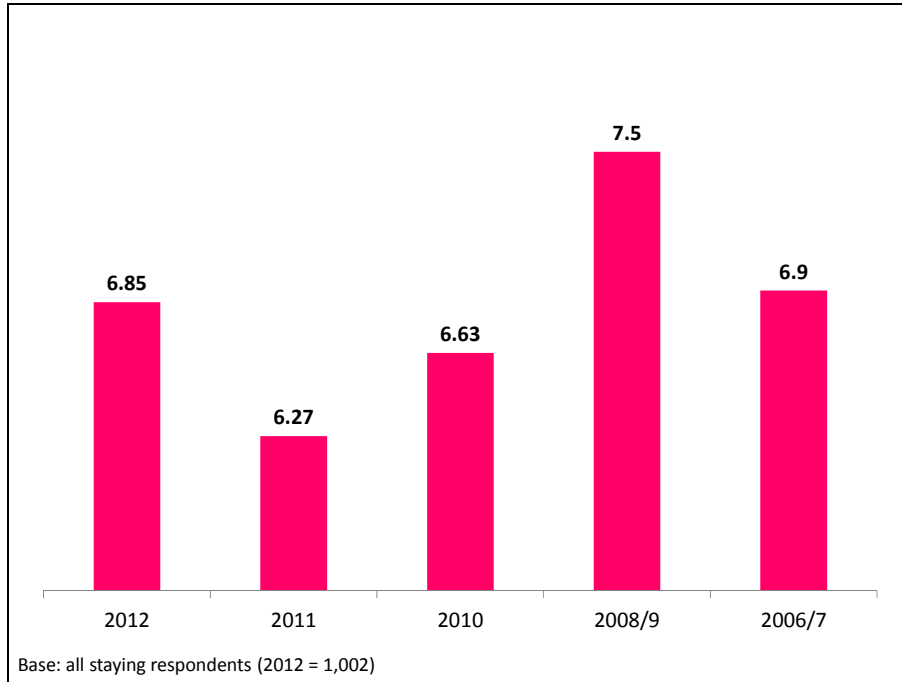
Table 3: Town nearest to location of accommodation

	Main reason (%)
Newquay	21%
St Austell	14%
Wadebridge	12%
St Ives	11%
Penzance	9%
Looe	6%
Helston	6%
Bude	4%
Falmouth	4%
Liskeard	3%
Bodmin	2%
Truro	2%
Camborne/ Redruth	1%
Launceston	1%
Sample size	1,002

Base: all staying visitors

The average number of nights stayed stands at 6.9 in 2012 – up from 6.3 in 2011. The average number of nights is highest in the summer months (8.5) and lowest in the spring (6.2) and autumn/ winter (5.8).

Chart 10: Average number of nights stayed



Reflecting the nature of the trip taken by the different visitor groups, those visitors falling into the *Young Independents* lifestage take an average of 5.7 nights, with *Families* taking 6.8 nights. *Older Independents* have the highest average nights with 7.1 nights.

4.1.3 Destination Choices

For the majority of visitors to Cornwall there was no other destination considered when planning their trip: 77% said they did not choose Cornwall in direct preference to another destination. This rises to 82% who classify themselves on a *short break* and falls to 68% amongst those who were on a *secondary/ additional holiday*.

Amongst those who *did* consider another destination, leading destinations were:

- The South West (26%)
- Europe (16%)
- Scotland (12%)
- Wales (11%)

For the majority of visitors it is *past experience* that drives a repeat visit: for two thirds (67%) they are visiting because we've enjoyed previous visits, amongst other reasons, and it is the main reason for over a third (37%). See the table below for the list of reasons, ranked in order of most-mentioned (all influences).

Table 4: Reasons for visiting Cornwall

	All influences	Main reason
Because we've enjoyed previous visits	67%	37%
The beauty of the natural landscape	51%	11%
Because it's peaceful/ relaxing/ quiet	47%	8%
High quality beaches/ bathing	31%	3%
To visit family and friends (and/or their property)	22%	15%
To visit a specific location or attraction	16%	5%
Because it's easy to get to	15%	1%
South West Coast Path	11%	2%
To undertake a specific hobby/ pastime/ activity	8%	3%
Word of mouth/ recommendation	6%	2%
To visit own property (house, caravan etc)	4%	3%
Because of an advert or special offer	3%	1%
Business	1%	1%
Never been before/ somewhere new	1%	1%
Sample size	970	

Base: all visitors

Amongst the main reasons for visiting the region there are a few differences across the visitor profiles, with those interviewed in Bodmin/ Tamar Valley more likely to mention the *beauty of the natural landscape* and those on the North Coast more likely than those elsewhere to mention because it's *peaceful/ relaxing*. This was also mentioned by a greater proportion of visitors in the autumn and winter months.

4.2 VISIT EXPERIENCE

St Ives was the most-mentioned urban destination for visitors with 37% having visited or intending to visit the town as part of their trip, with Newquay (33%) the second most-mentioned. This corresponds with previous years, with St Ives mentioned by 38% and Newquay by 33% in 2011. The centres of St Austell/ Charlestown (mentioned by 23% in 2012, 13% in 2011) and Rock/ Padstow/ Polzeath (mentioned by 32% in 2012 and 20% in 2011) have increased in intention to visit, while Truro has decreased (26% in 2012 from 35% in 2011).

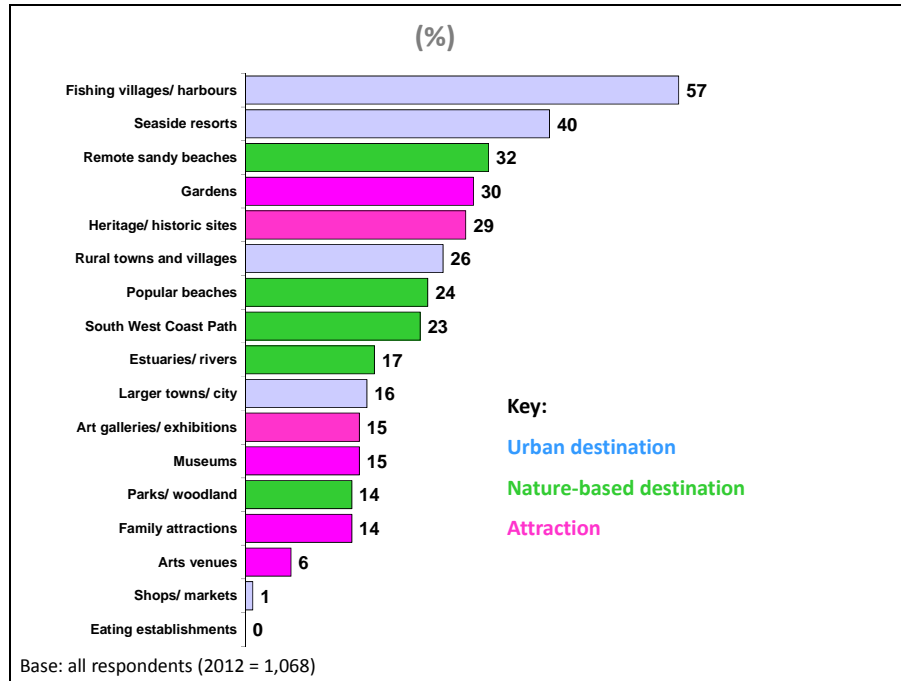
Table 5: Towns visited or plan to visit during trip (top mentions)

	Visited/ intend to visit (%)
St Ives	37%
Newquay	33%
Rock/ Padstow/ Polzeath	32%
Penzance/ Newlyn	28%
Truro	26%
Charlestown/ St Austell	23%
Mevagissey	21%
Falmouth/ Penryn	20%
Polperro/ Looe	17%
Fowey	17%
The Lizard	16%
Perranporth/ St Agnes	15%
Bodmin	15%
Boscastle/ Tintagel	13%
Sample size	1,068

Base: all visitors

Coastal locations dominate the list of destinations/ potential destinations for visitors. The most-mentioned destination was *fishing villages/ harbours*, mentioned by over half (57%) of all visitors. This was followed by *seaside resorts* (40%) and *remote/ sandy beaches* (32%). See chart, below.

Chart 11: Destinations visited/ planning to visit during trip



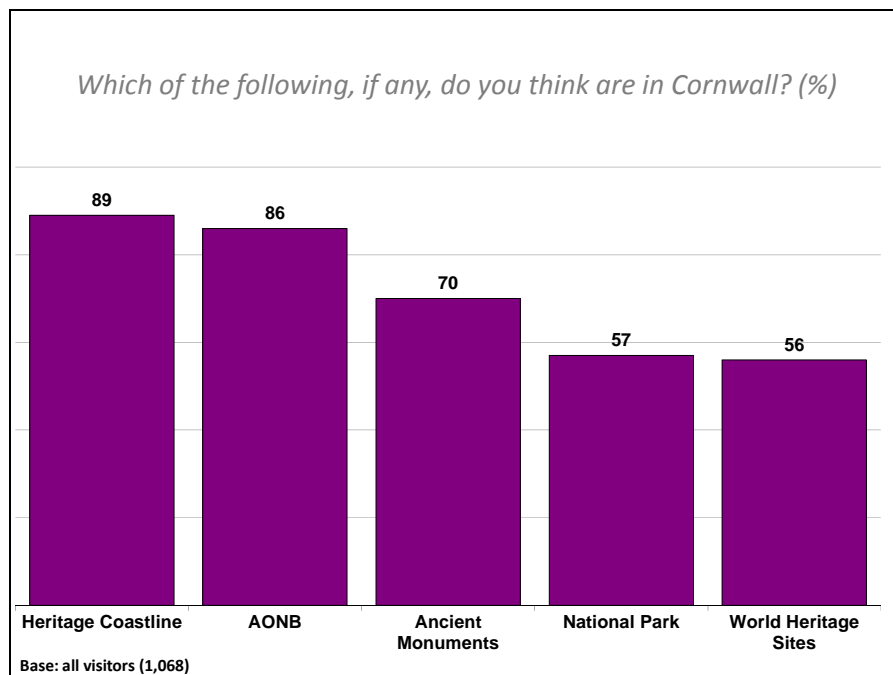
There are significant differences within the sample of visitors:

- Gardens** are more likely to be visited during the spring (37% intend to do so) compared to the autumn/ winter (23%). They are also more popular amongst those in West and South Cornwall (38% and 35% intend to visit gardens during their trip) compared to those interviewed in North Cornwall (21%) and Bodmin/ Tamar (23%). Almost half (43%) of those aged 65+ intend to visit a garden during their trip, compared to 23% aged 25-44.
- Heritage/ historic sites/ properties** are mentioned by a greater proportion of visitors in West Cornwall (20%) compared to Bodmin/ Tamar (7%). Amongst those on a first time trip to Cornwall nearly half (46%) intend to visit a heritage/ historic site/ property compared to 27% on a repeat visit to the county. They are also mentioned by a greater proportion of visitors from AB social grade (37%) compared to those from C2 (23%) and DE (27%) social grades.

- **Family attractions** are, not surprisingly, mentioned by a greater proportion of families (31%) compared to Young Independents (11%) and Older Independents (8%).
- **The South West Coast Path** is most popular in the spring (28% have visited or intend to visit) compared to the summer (21%) and autumn/ winter (22%). A greater proportion of AB social grades have visited/ intend to make use of the path (32%) compared to those from other social grades (19%).

When looking at the sites of interest in the county, almost nine in ten visitors to Cornwall (89%) believed that the county possessed *heritage coastline* and a similar proportion (86%) believed it possessed *Areas of Outstanding Natural Beauty*. See chart, below.

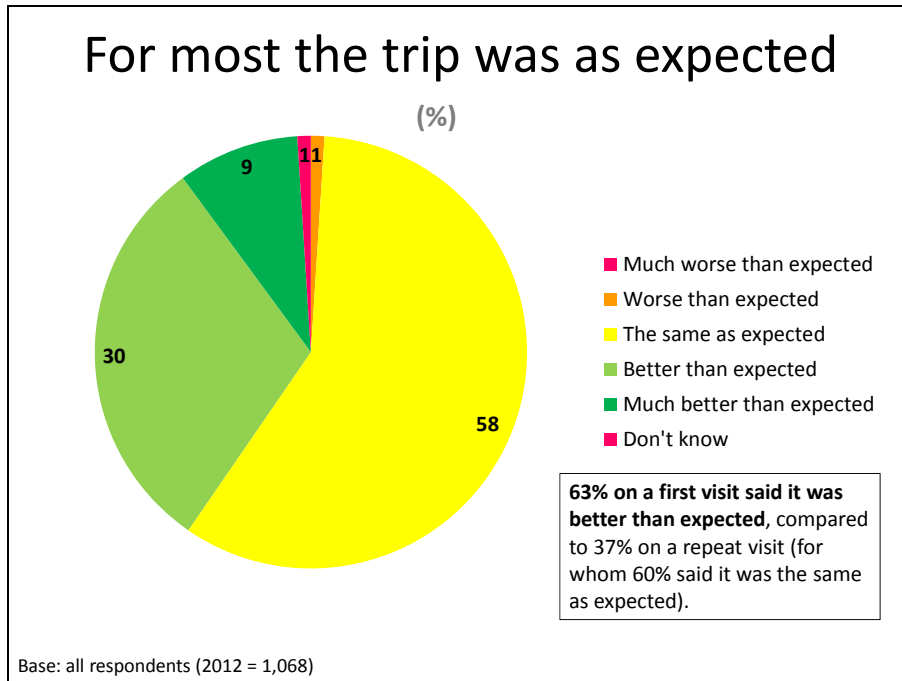
Chart 12: Recognition of sites of interest



Interestingly over half (57%) believed – incorrectly – that Cornwall has a *national park* within its boundaries.

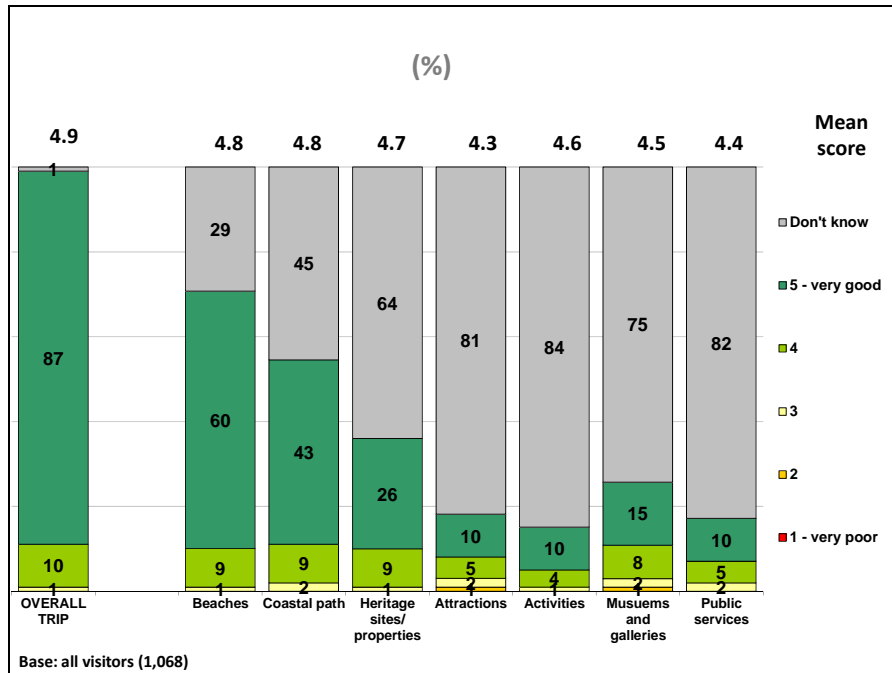
Cornwall lives up to expectations for the majority of visitors (58%) the trip was the same as expected. This is not surprising given the high proportion (91%) of repeat visitors to the region and it does not necessarily imply a negative experience: repeat visitors are returning because a previous visit was enjoyable and the current trip is the same as expected. For almost a third (30%) the trip was better than expected and for nearly one in ten (9%) it was much better than expected. This rose to 15% amongst those on a first visit to Cornwall.

Chart 13: Destinations visited/ planning to visit during trip



Visitors were asked to rate elements of their trip, from very good through to very poor on a five point scale. The results, shown in the chart below, demonstrate not only that the elements of the trip were positively received, but also that for the majority of visitors a number of the elements were not experienced. Over four in five visitors were not able to rate attractions, activities and public services while three quarters were unable to rate museums and galleries.

Chart 14: Rating trip elements



The survey also captured another measure of satisfaction with the trip: the use of the Net Promoter Score. Net Promoter Scores (NPS) measure customer loyalty using the question how likely is it that you would recommend Cornwall as a place to visit to a friend or colleague? The scale used runs from '0' (not at all likely) to '10' (extremely likely). Three distinct groups are produced:

Detractors (those who score 0-6). Customers that have generated sales but are actually bad for the 'company' over the long haul. They are less likely to buy anything/ visit again and are more likely to spread bad word of mouth and more costly to serve because of their dissatisfaction.

Passives (those who score 7-8). Customers are generally more positive but are significantly less valuable than Promoters. Passives may be satisfied but that may not be in the longer term.

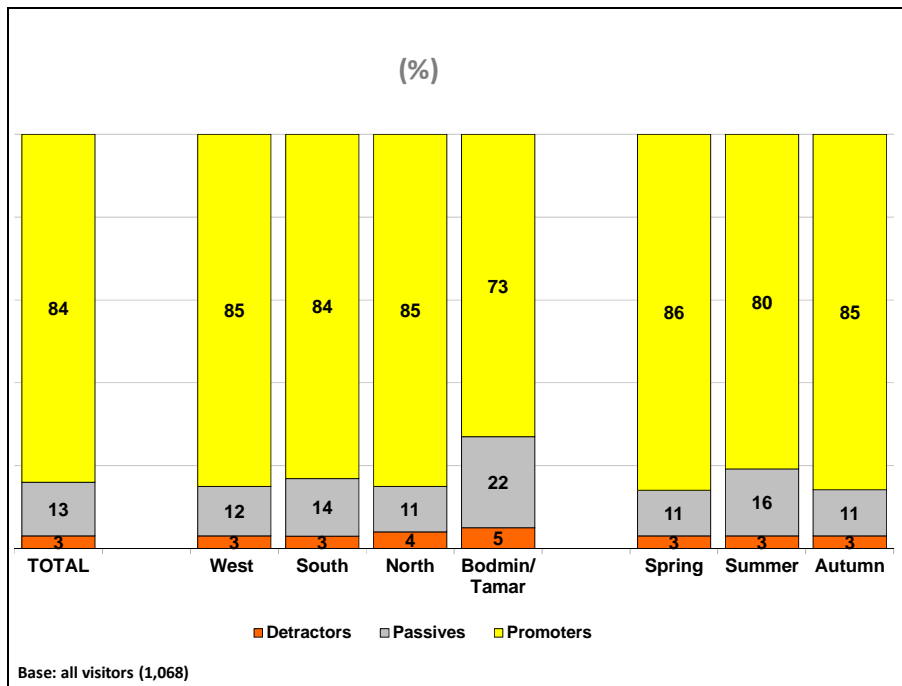
Promoters (those who score 9-10). Customers that drive business growth. The company has gone beyond satisfying needs and truly delights them. As a result they will be more likely to revisit and to recommend it to many others.

The Net Promoter Score is a simple calculation as follows:

$$(\% \text{ Promoters}) - (\% \text{ Detractors})$$

For Cornwall the NPS stands at 81: slightly higher in the spring (83) and autumn/winter (82) and lower in the summer (77). There is some variation in the NPS regionally, with Bodmin/ Tamar achieving a score of 68.

Chart 15: Net Promoter Score



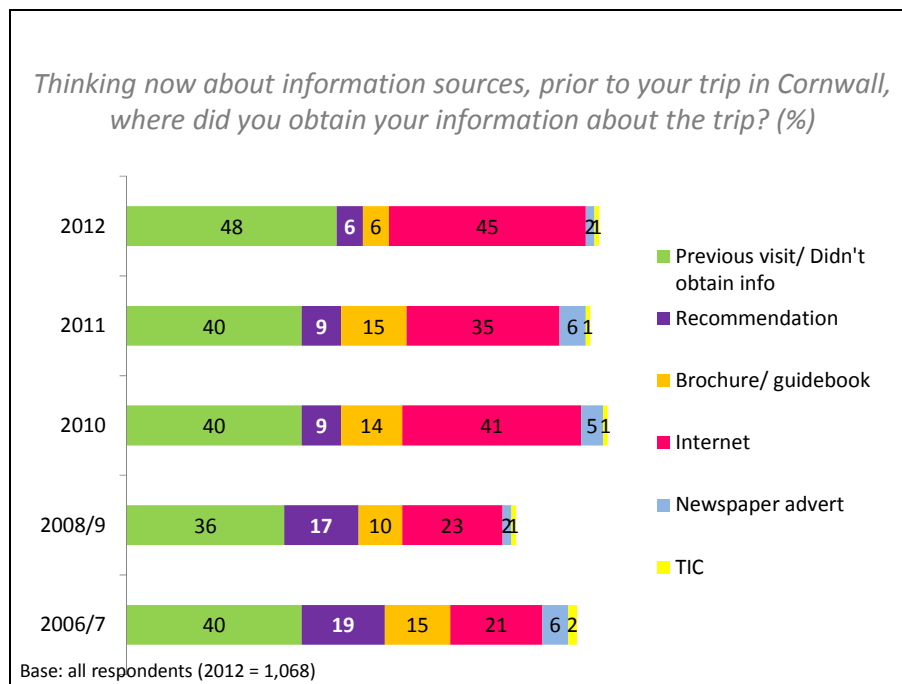
The Net Promoter Score has risen significantly from 65 in 2010 and 63 in 2011.

4.3 INFORMATION

Including pre- and during-visit information sourcing.

The rise of the internet as an information source prior to taking the trip is clearly shown in the chart below. In 2006/7 just 21% of visitors used the internet to find out information before travelling to Cornwall, compared to over double that proportion (45%) in 2012. The high proportion of repeat visitors also informs future visits with just under half (48%) in 2012 claiming they either did not source information prior to the visit or they used knowledge gained from a previous visit.

Chart 16: Information sources prior to trip

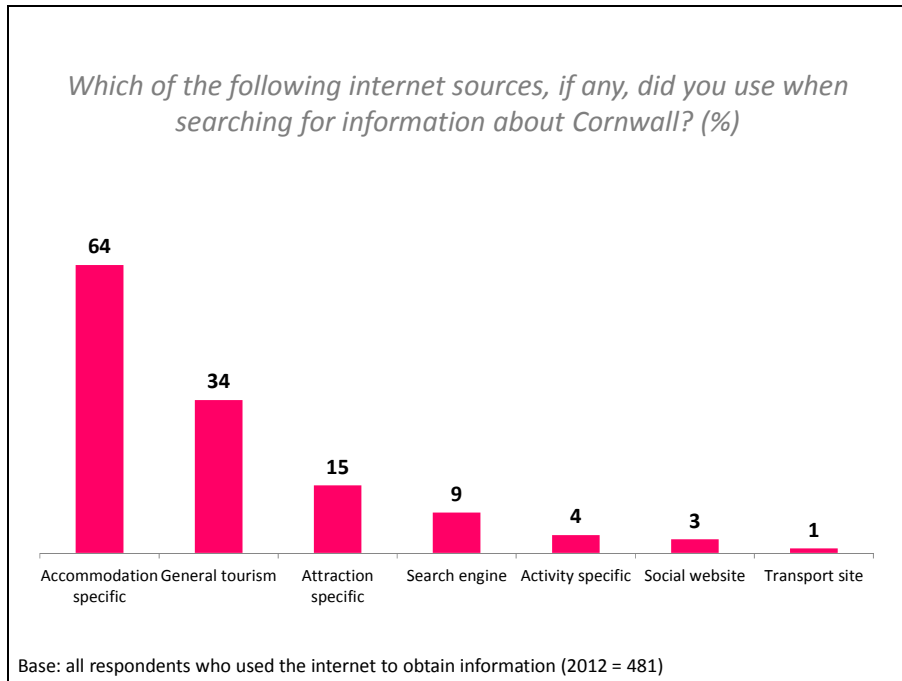


The use of the internet prior to the visit is even more pronounced amongst first-time visitors. Three quarters (75%) of those who have not been to the county before used the internet to find out information about the trip.

Amongst those who used the internet the majority did so to source information and to book accommodation/ car hire/ flights/ tickets (72%). Just over a quarter (27%) used the internet to source information only.

Accommodation sites were the most-mentioned type of internet source prior to taking a trip to Cornwall: 64% of those who used the internet to source information consulted an accommodation site. General tourism sites were the next most-mentioned internet source of information: mentioned by 34% of internet users.

Chart 17: Information sources prior to trip



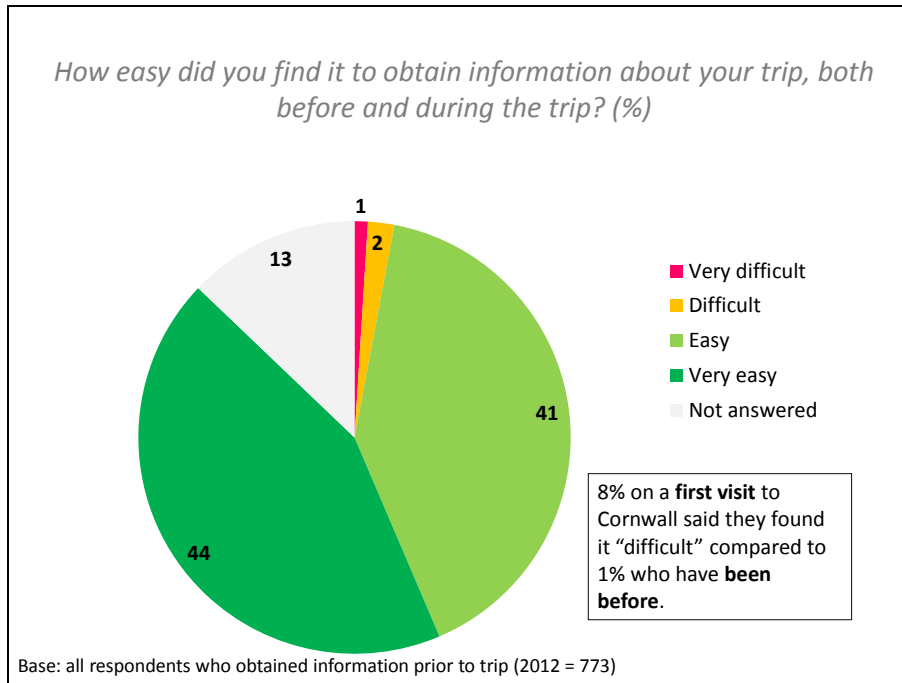
During the trip the areas that visitors are most likely to gather information on are:

- Places to go (30%)
- Things to do (30%)
- Attractions (23%)
- Maps (15%)
- Events (11%)
- Accommodation (7%)
- Offers (3%)
- Transport (1%)

Just under half (49%) will not gather information during their trip. Those travelling in the autumn/ winter are most likely to not gather information (60% will not gather information during the trip).

Sourcing information is not an issue for visitors both prior to the trip and during the trip: 85% rated it easy and just 3% rated it difficult. Overseas visitors were more likely to report it is difficult to source information (15% did so).

Chart 18: Ease of obtaining information – prior to and during the trip

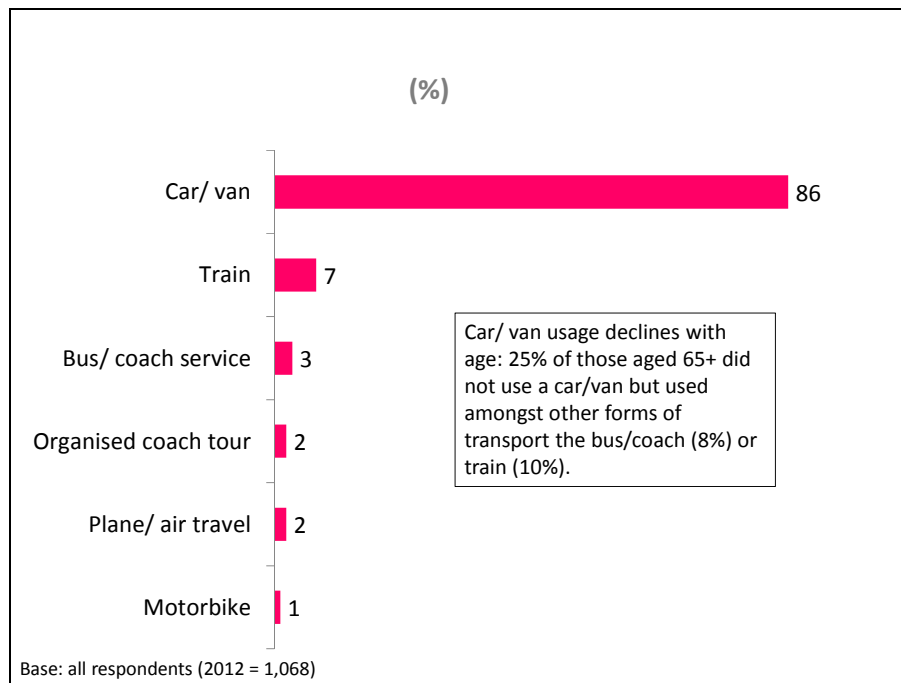


4.4 TRANSPORT

Including use of transport to and around Cornwall.

For the majority of visitors (86%) the car or van was the main form of transport (see chart below). This proportion has increased from 75% in 2011. The most significant decrease between 2011 and 2012 has been with organised coach tour down from 11% of visitors in 2011 to just 2% in 2012. One reason for this may be due to differences in fieldwork procedures (we only interview one member of a coach party but other agencies may interview multiple members). In addition in 2012 there were 21 locations for interviewing while in 2011 there were just 6 – all of which were reasonable sized urban areas which can attract coach parties.

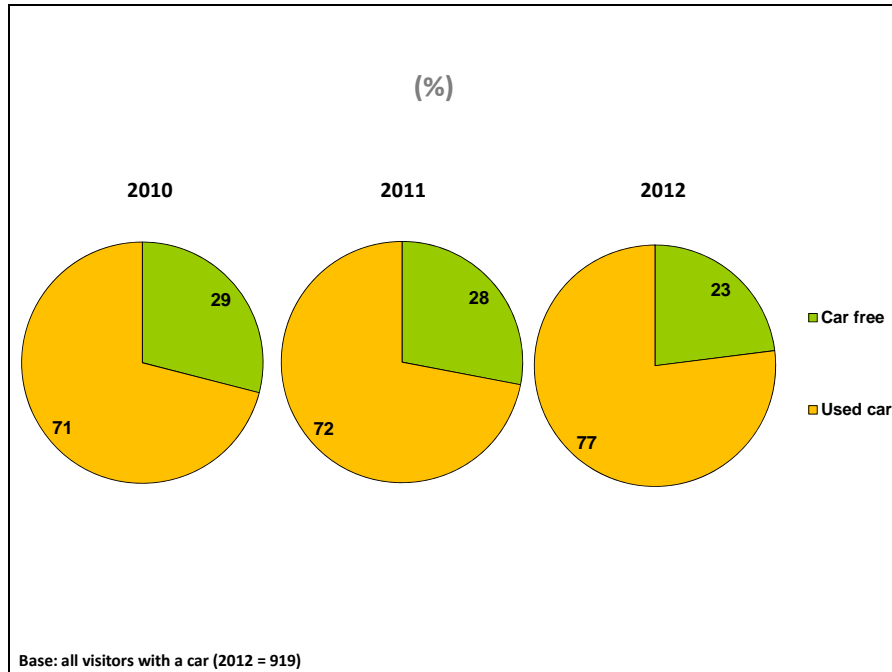
Chart 19: Main form of transport for longest part of journey to Cornwall



Almost all (93%) of visitors who travelled by car/ van did not consider another form of transport for the journey. Those that were most likely to consider another form of transport were on a first trip to Cornwall (13% said they had considered another form of transport) and those in the younger age groups (15% of those aged under 34 considered an alternative).

The proportion of car-free days has declined slightly over time: down from 29% in 2010 to 23% in 2012.

Chart 20: Proportion of car-free days 2010 - 2012

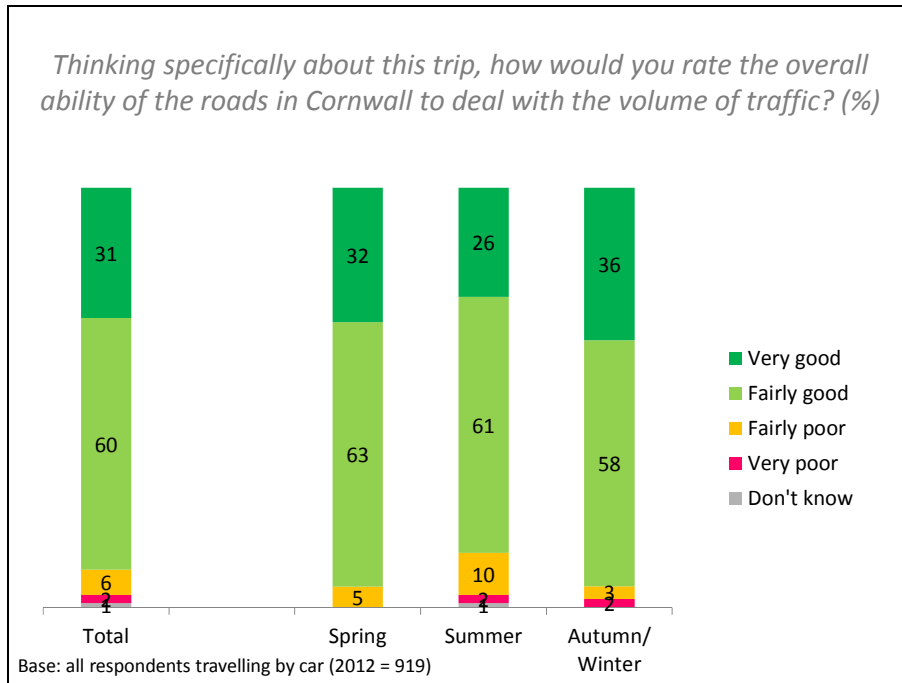


In 2012 amongst those who had car-free days, these were due to:

- Staying close to accommodation (75%)
- Using public transport (14%)
- Using other transport (11%)

Just over three quarters (76%) of visitors used the A30 with just under a quarter (24%) using the A38 and 18% using the A39. Visitors who had used the roads were asked to rate them for their ability to deal with the volume of traffic. The results in the chart below show that the roads of Cornwall were positively rated with only a very slight decrease in satisfaction over the busy summer months.

Chart 21: Rating the major Cornish roads

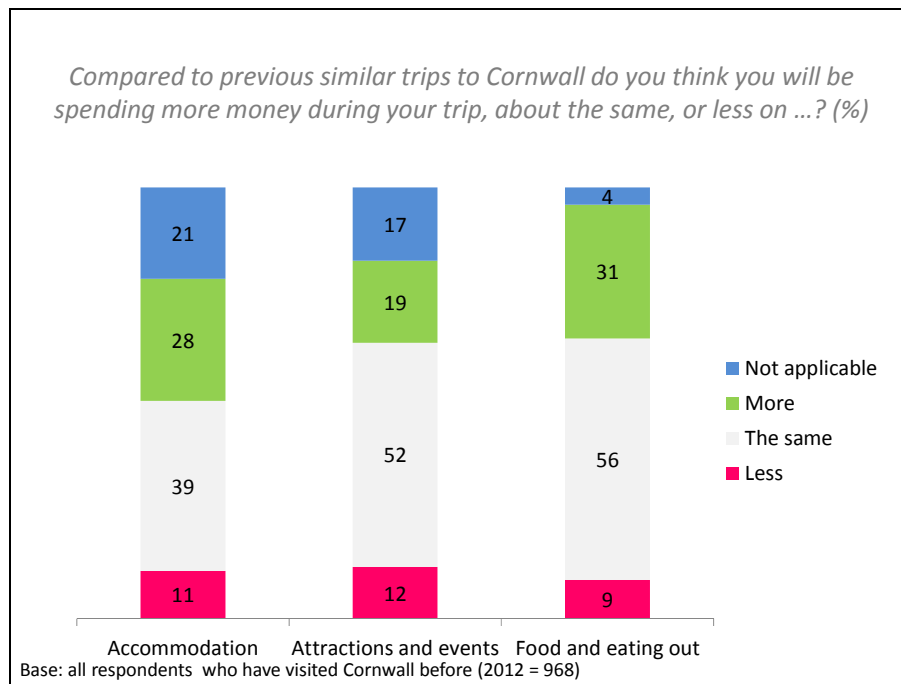


4.5 SPEND

Including comparable spend with previous trips, parking and public toilet charges, and attitudes towards a visitor loyalty scheme and a 'charged card'.

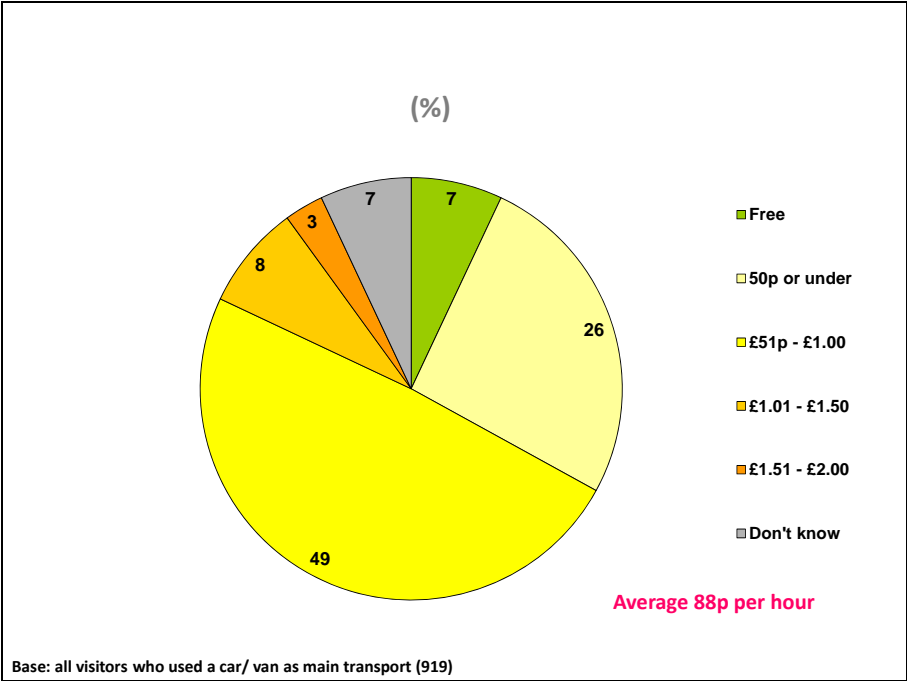
Spend while on a trip appears to be holding steady, despite the difficult financial climate. Only around one in ten repeat visitors to Cornwall are planning to spend less on accommodation, attractions and events and/or food and eating out. For the majority of visitors the trip spend will be on a par with a previous comparable trip and for between 19% and 31% trip spend will be more on the elements. See chart, below.

Chart 22: Spend compared to previous comparable trips to Cornwall



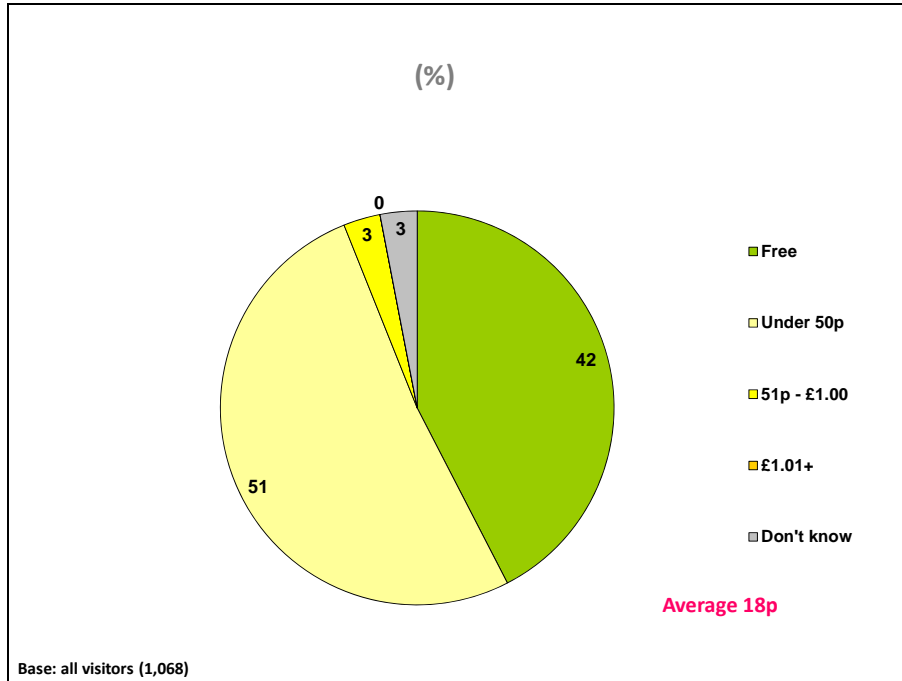
When asked what they thought a fair and reasonable charge for parking in Cornwall would be, only 7% said free (see chart, below). A quarter of visitors said they believed it should be 50p or under, per hour with half (49%) believing it should be between 51p and £1.00 per hour. The average cost was 88p per hour.

Chart 23: Fair and reasonable charge for parking in Cornwall



When asked what they thought would be a fair and reasonable charge for using good quality public toilets, 42% of visitors believed they should be free of charge (see chart, below). Just over half (51%) believed they should be below 50p. The average cost came out at just 18p.

Chart 24: Fair and reasonable charge for using high quality public toilets

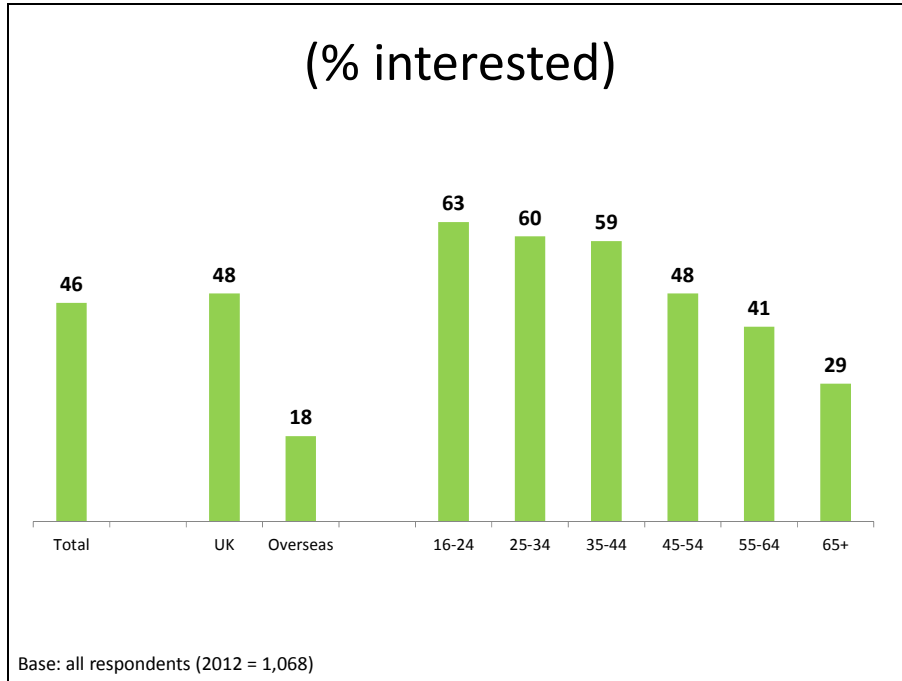


Visitors were asked to give their opinions on the possibility of the introduction of an Oyster Card, with the following explanation read out to them:

“Some holiday destinations are considering creating a card which can be ‘charged up’ with money (like an Oyster Card in London) and that could pay for public transport, parking and leisure facilities during your trip within the region. Readily available it would offer discounts of up to 25% on regular prices and would not expire so could be used on return visits. Is this something you would be interested in on future trips to Cornwall?”

Just under half (46%) of visitors would be interested in the proposed scheme, with interest peaking in the younger age groups: around three in five aged under 44 would be interested compared to just over one in five in the 65+ age group. See chart, below.

Chart 25: Interest in Oyster-Card style chargecard



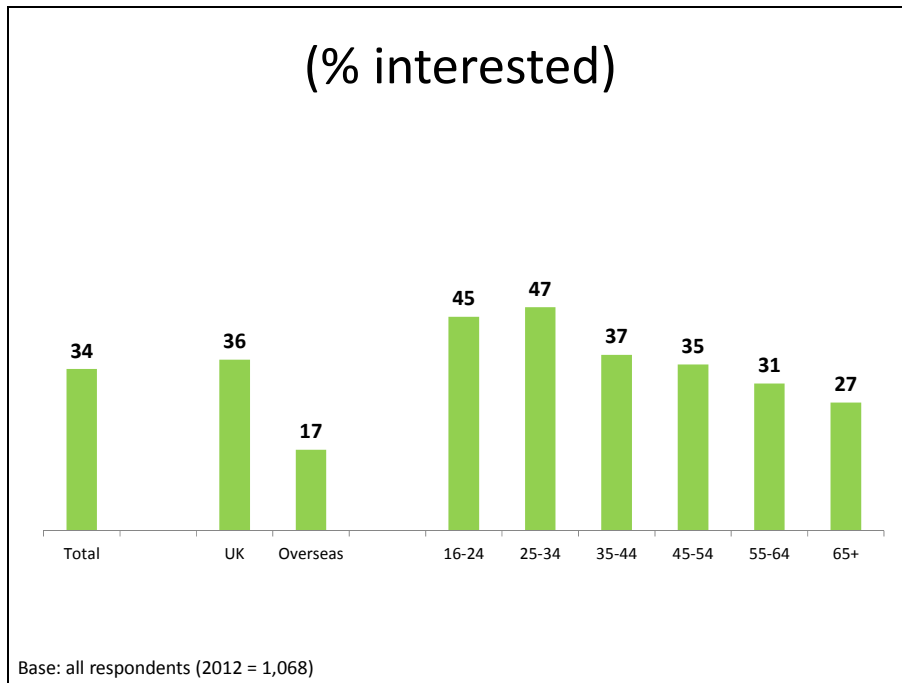
Amongst those who expressed an interest in the card, the average amount they would charge to the card was given as £68. This ranged from £59 on average amongst those on a short break, £65 on average amongst those on a secondary/ additional holiday, and £99 on average for those on a main holiday.

Visitors were also asked to say whether they were interested in a visitor loyalty scheme, with the following explanation read out to them:

“Visit Cornwall are looking at setting up a visitor loyalty scheme which will support projects via donations to improve and protect the natural environment and help community based learning initiatives. Is this something you would be interested in?”

The results show a slightly lower level of interest than with the Oyster Card scheme, with just over a third (34%) believing they would be interested in the visitor loyalty scheme: again there was more interest amongst younger visitors than those in the older age groups. See chart below.

Chart 26: Interest in visitor loyalty scheme



APPENDIX I – SURVEY QUESTIONNAIRE

**2012 CORNWALL VISITOR SURVEY
(B01212) FINAL**

<i>For office use:</i>	<i>Sample point ref:</i>	(1)	(2)	<i>Case number</i>	(3)	(4)	(5)	(6)
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APPROACH ADULTS AGED 16 AND OVER

Good morning/afternoon. My name is.....from Beaufort Research, a member of the Market Research Society. We are conducting a survey among visitors here today on behalf of Visit Cornwall. Could you spare me a few minutes to answer some questions about your trip? It won't take longer than about 10 minutes and everything you say will be kept confidential.

Q1	First of all, can I check – do you live in Cornwall?	(7)			
	Yes	1 Thank and close			
	No	2 →Q2			
Q2	In which country is your main place of residence?	(8-9)			
	Somewhere in the UK (write in county) _____	x			
	Other European (write in country) _____	x			
	Other international (write in country) _____	x			
Q3	SHOWCARD A What is the MAIN purpose of your trip to Cornwall today? SINGLE CODE	(10)			
	Leisure/ holiday	1			
	Visiting friends/ family	2			
	Shopping trip (a special/ non-regular trip)	3			
	Business/ attending a conference	4			
	Other (specify) _____	5			
		→Q4			
		Thank and close			
Q4	SHOWCARD B Which of the following describe the trip that you are on today? MAY MULTICODE STAYING OPTIONS (IE MAY BE STAYING PART IN CORNWALL AND PART ELSEWHERE)	(11m)			
	A day trip from home	1 →Q9			
	A trip staying away from home staying in CORNWALL	2 →Q5			
	A trip staying away from home staying OUTSIDE CORNWALL	3 →Q7			
Q5	Where are you staying in Cornwall? _____ _____	(12)			
	(IF STAYING IN CORNWALL)	(13) (14) (15)			
Q6	How many nights, in total, will you be staying <u>in Cornwall</u> as part of your trip?	<table border="1"><tr><td></td><td></td><td></td></tr></table>			
Q7	(ALL STAYING AWAY FROM HOME – IN CORNWALL OR ELSEWHERE) Does this trip in Cornwall replace a holiday that would normally be taken abroad? SINGLE CODE	(16)			
	Yes	1			
	No	2			
	Don't know	3			

Q8	SHOWCARD C What type of trip are you on?					(17)
		Main holiday of the year				1
		Secondary/ additional holiday				2
		A short break				3
		Other				4
		Don't know				5
Q9	ASK ALL Did you choose this trip to Cornwall in direct preference to another destination?					(18)
		Yes				1 →Q10
		No				2 →Q11
Q10	(IF YES) Where else did you consider for this trip?					(19-22m)
Q11	ASK ALL Is this your first visit to Cornwall?					(23)
		Yes				1 →Q14
		No				2 →Q12
Q12	(IF BEEN TO CORNWALL BEFORE) SHOWCARD D When was your last visit to Cornwall?					(24)
		Within the last month				1
		Within the last six months				2
		Within the last twelve months				3
		1 – 2 years ago				4
		3 – 4 years ago				5
		5 or more years ago				6
		Can't remember				7
Q13	Compared to previous similar trips to Cornwall do you think you will be spending more money during your trip, about the same, or less on the following aspects?					
	Read out ↓	Spending LESS	Spending about the same	Spending MORE	Not applicable	
	Accommodation	1	2	3	4	(25)
	Attractions and events	1	2	3	4	(26)
	Food and eating out	1	2	3	4	(27)
Q14	ASK ALL SHOWCARD E Who are you with on this trip?					(28)
		Alone				1
		Spouse/ partner				2
		Family only				3
		Friends only				4
		Family and friends				5
		With club/ organised group				6
		Other				x

SHOWCARD F		
Q15	Do you or does anyone in your immediate party have any of the following conditions or impairments? You can read out the letter on this card. MULTICODE. INCLUDES PROBLEMS WHICH ARE DUE TO OLD AGE	(31-32m)
	A Mobility (e.g. wheelchair use)	1
	B Sight (either partial sight or blind)	2
	C Hearing	3
	D Learning	4
	E Long-term illness (e.g. cancer, arthritis)	5
	Other	6
	No conditions or impairments	7
	Don't know	8
	Refused	9

SHOWCARD G		
Q16a	Which of the following, if any, influenced your decision to visit Cornwall? MAY MULTICODE	
Q16b	And which <u>one</u> , if any, is your <u>main reason</u> for visiting Cornwall? SINGLE CODE	
	Qa ALL REASONS (33-36m)	Qb MAIN REASON (39)
	Because we've enjoyed previous visits	1
	Word of mouth/ recommendation	2
	Because it's easy to get to	3
	The beauty of the natural landscape	4
	High quality beaches/ bathing	5
	Because it's peaceful, relaxing, quiet	6
	To undertake a specific activity, hobby, pastime	7
	To visit a specific location or attraction	8
	To attend a specific event or show	9
	To visit family and friends (and/or their property)	A
	To visit own property (e.g. house, caravan etc)	B
	Because of an advert or special offer	C
	Presence of Olympic Torch relay in Cornwall	D
	To get away from the Olympics	E
	South West Coast Path	F
	Other reason (specify) _____	x
	(37-38m)	(40)

INFORMATION SOURCES

Q17	SHOWCARD H Thinking now about information sources, <u>prior to your trip</u> in Cornwall, where did you obtain your information about the trip? MAY MULTICODE	(41-44m)
	Previous visit	1
	Recommendation	2
	Newspaper advert	3
	Travel agent	4
	Tourist information centre	5
	Brochure/ guidebook	6
	Internet	7
	Television programme	8
	Didn't obtain information prior to trip	9
	Other (specify) _____	x
		(45-46m)

Q18	<p>IF USED INTERNET (OTHERS GO TO Q20) Did you use the internet to source information ONLY or did you use it to source information AND to book accommodation/ car hire/ flights/ tickets etc.</p> <p style="text-align: right;">Information sourcing ONLY Information sourcing AND to book accommodation/ car hire/ flights/ tickets etc</p>	<p>(47)</p> <p>1 2</p>
Q19	<p>SHOWCARD I Which of the following internet sources, if any, did you use when searching for information about Cornwall? MAY MULTICODE</p> <p style="text-align: right;">Accommodation specific websites Attraction specific websites Activity specific websites (e.g. walking, surfing etc) Social websites (e.g. Facebook, Twitter etc) General tourism websites (e.g. visitcornwall.com etc) Other (specify) _____</p>	<p>(48-51m)</p> <p>1 2 3 4 5 x</p>
Q20	<p>ASK ALL <u>During your trip</u>, which of the following areas have you / will you gather information on? MAY MULTICODE</p> <p style="text-align: right;">Events Attractions Accommodation Things to do Places to go Maps Offers Will not gather information <u>during</u> trip Other (specify) _____</p>	<p>(52-55m)</p> <p>1 2 3 4 5 6 7 8 x</p>
Q21	<p>IF DID NOT OBTAIN INFORMATION AT Q17 AND Q20 SKIP TO Q22 SHOWCARD J How easy did you find it to obtain information about your trip, both before and during the trip?</p> <p style="text-align: right;">Very difficult Difficult Easy Very easy</p>	<p>(56)</p> <p>1 2 3 4</p>
TRANSPORT		
Q22	<p>ASK ALL SHOWCARD K What was the main form of transport you used for the longest part of your journey to Cornwall during this trip?</p> <p style="text-align: right;">Car/ van Bus/ coach service Organised coach tour By plane/ air travel Bicycle Train Other (specify) _____</p>	<p>(57)</p> <p>1 →Q23 2 3 4 } →Q29 5 6 x</p>
Q23	<p>(IF CAR/ VAN USER) Did you consider any alternative forms of transport for the longest part of your journey to Cornwall during this trip?</p> <p style="text-align: right;">Yes No</p>	<p>(58)</p> <p>1 2</p>

Q24a What is the total number of days that you have stayed in Cornwall SO FAR on this trip? (60) (61) (62)

Q24b And how many of these days would you estimate that you have NOT used your car? (63) (64) (65)

IF NO DAYS, SKIP TO Q26

(ALL WHO HAVE NOT USED CAR FOR AT LEAST ONE DAY)

Of the days that you haven't used your car/ van what proportion were spent...

RECORD %. ENSURE ALL THREE ADD UP TO 100%

Q25a On public transport (e.g. train, public bus) (66) (67) (68)

Q25b Close to accommodation so no transport required (69) (70) (71)

Q25c On other transport (72) (73) (74)

Q26 Which of the following roads, if any, did you use to reach Cornwall for this trip? The A30, the A38 or the A39?
MAY MULTICODE

		(75-76m)
A30	1	
A38	2	
A39	3	
Don't know/ can't remember	4	

Q27 **SHOWCARD L**
 Thinking specifically about this trip, how would you rate the overall ability of the roads in Cornwall to deal with the volume of traffic?

		(77)
Excellent	1	
Fairly good	2	
Fairly poor	3	
Very poor	4	
Don't know	5	

Q28 What do you think is a fair and reasonable hourly charge for car parking in Cornwall?
IF "SHOULD BE FREE" WRITE IN 0000. DON'T KNOW = 9999

Hourly charge...	£	£	p	p
	(78)	(79)	(80)	(81)
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

ASK ALL

Q29 And what do you think is a fair and reasonable charge for using public toilets that are high quality? **DO NOT PROMPT.**
IF "SHOULD BE FREE" WRITE IN 0000. DON'T KNOW = 9999

Hourly charge...	£	£	p	p
	(82)	(83)	(84)	(85)
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Q30 Some holiday destinations are considering creating a card which can be "charged with money" (like an Oyster Card in London) and that could pay for public transport, parking and leisure facilities during your trip within the region. Readily available it would offer discounts of up to 25% on regular prices and would not expire so could be used on return visits. Is this something you would be interested in purchasing on future trips to Cornwall?

		(86)
Yes	1	→Q31
No	2	→Q32
Don't know	3	→Q32

Q31 **(IF YES)**
 What value do you think you would charge on the card for a trip like your current trip?
ENTER VALUE. IF RANGE CHOOSE MID POINT. DK = 999. DO NOT PROMPT.

	(87)	(88)	(89)
	<input type="text"/>	<input type="text"/>	<input type="text"/>

THE TRIP

ASK ALL SHOWCARD M		
Q32	Which towns have you or do you plan to visit during your trip in Cornwall? MAY MULTICODE	
	(90-93m)	
	St Ives 1	Newquay B
	Mevagissey 2	Bude C
	Polperro/ Looe 3	Boscastle/ Tintagel D
	Perranporth/ St Agnes 4	Lostwithiel E
	Fowey 5	The Lizard F
	St Austell 6	Bodmin G
	Padstow/ Polzeath 7	Torpoint H
	Falmouth/ Penryn 8	Launceston I
	Truro 9	(94-97m)
	Penzance/ Newlyn A	Other (specify) _____ x

SHOWCARD N		
Q33	Which of the following types of attractions or places of interest will you/ do you plan to visit during your trip to Cornwall? MAY MULTICODE	
	(98-101m)	
	Gardens 1	Remote sandy beaches 9
	Heritage/ historic sites/ properties 2	Popular well-served beaches A
	Family attractions (e.g. theme parks) 3	Rural towns and villages B
	Estuaries/ rivers 4	Larger towns/ city C
	Art galleries and exhibitions 5	South West Coast Path D
	Museums 6	Performing arts venues (e.g. theatres, cinema) E
	Fishing villages and harbours 7	Country parks/ woodlands F
	Seaside resorts 8	Others (specify) _____ x
		(102-105m)

SHOWCARD O		
Q34	Which of the following, if any, do you think are in Cornwall? It doesn't matter if you don't know for sure, we would just like your opinion. MAY MULTICODE	
	(106-109m)	
	Areas of Outstanding Natural Beauty 1	
	A National Park 2	
	World Heritage Sites 3	
	Ancient Monuments 4	
	Heritage Coastline 5	

SHOWCARD P		
Q35	Using the scale on this card how would you rate the following aspects of your trip to Cornwall?	
	Read out ↓ Very poor Very good Don't know	
	Museums and galleries 1 2 3 4 5 6	(110)
	Attractions (e.g. theme parks, farms) 1 2 3 4 5 6	(111)
	Activities (e.g. cycle hire, outdoor recreation) 1 2 3 4 5 6	(112)
	Heritage sites/ properties 1 2 3 4 5 6	(113)
	Public services (e.g. transport, leisure centres) 1 2 3 4 5 6	(114)
	Beaches 1 2 3 4 5 6	(115)
	Coastal Path 1 2 3 4 5 6	(116)
	Overall trip 1 2 3 4 5 6	(117)

Q36	SHOWCARD Q											(120)
	How likely would you be to recommend Cornwall as a place to visit to your friends and/or family? Please use a scale of 0 – 10 where 0 = “extremely unlikely” and 10 = “extremely likely”.											
	Extremely unlikely ↓					Extremely likely ↓						
	0	1	2	3	4	5	6	7	8	9	10	

Q37	SHOWCARD R											(121)
	To what extent has your trip to Cornwall lived up to your expectations?											
	Much better than expected											
	Better than expected											
	The same as expected											
	Worse than expected											
Much worse than expected												
Don't know												

Q38	READ OUT.											(122)
	Visit Cornwall are looking at setting up a visitor loyalty scheme which will support projects via donations to improve and protect the natural environment and help community based initiatives. Is this something you think you would be interested in?											
	Yes											
	No											
Don't know												

Q39	SHOWCARD S											(123)
	Thinking <u>generally</u> , to what extent do you agree or disagree with the following statements? Please use a scale of 0 – 10 where 0 = strongly disagree and 10 = strongly agree.											
	Strongly disagree ↓					Strongly agree ↓						
I like to try things that are new to me	0	1	2	3	4	5	6	7	8	9	10	(123)
I am happy to do my own thing regardless of what others might think	0	1	2	3	4	5	6	7	8	9	10	(124)
I am prepared to take risks in order to get the most out of life	0	1	2	3	4	5	6	7	8	9	10	(125)
I find it easy to justify buying expensive alternatives	0	1	2	3	4	5	6	7	8	9	10	(126)
Arts and culture are an important part of who I am	0	1	2	3	4	5	6	7	8	9	10	(127)
I have a fond liking for things that others might describe as old fashioned	0	1	2	3	4	5	6	7	8	9	10	(128)
I would be prepared to pay more for a fashionable brand	0	1	2	3	4	5	6	7	8	9	10	(129)

Q40	Would you be happy to be recontacted in the future to take part in further research related to this subject? Your details would only be passed on to Visit Cornwall and would not be used for the purposes of selling.											(130)
	IF YES TAKE EMAIL ADDRESS											
	Yes (email address) _____											
											No	

CLASSIFICATION

Now just a few details to check that our sample is representative

GENDER	(140)		STATUS IN HOUSEHOLD	(145)
		Male	* Chief Income Earner	1
		Female	Other adult (aged 16+ or over)	2
AGE	(141)		WORKING STATUS OF RESPONDENT	(146)
		16-19	Working full time (30+ hours per week)	1
		20-24	Working part time (up to 29 hours per week)	2
		25-34	Full time education	3
		35-44	Retired	4
		45-54	Not working	5
		55-64	Other	6
		65 and over		
MARITAL STATUS	(142)		OCCUPATION OF CHIEF INCOME EARNER* (Last job if retired)	
		Married or equivalent	Actual job: _____	
		Single, never married	Position/ grade: _____	
		Widowed/ divorced/ separated		
CHILDREN (UNDER 16) IN HOUSEHOLD?	(143)		SOCIAL CLASS	(147)
		Yes	AB	1
		No	C1	2
			C2	3
			DE	4
(IF YES) Ages of children in h/hold.	(144m)			
		0-4		1
		5-10		2
		11-15		3

WHAT IS YOUR ETHNIC GROUP? SHOWCARD T

White	(148)	Mixed	Asian or Asian British	Black or Black British	Chinese or other				
White British	1	White & Black Caribbean	4	Indian	8	Caribbean	C	Chinese	F
White Welsh	2	White & Black African	5	Pakistani	9	African	D	Other	G
Other white	3	White & Asian	6	Bangladeshi	A	Other Black	E		
		Other mixed	7	Other Asian	B				

*The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source. Either male or female.

Respondent name: _____

Address: _____ County (Country if outside UK): _____

Postcode:

(149)	(150)	(151)	(152)	(153)	(154)	(155)
-------	-------	-------	-------	-------	-------	-------

 Telephone number: _____

THANK RESPONDENT: CLOSE INTERVIEW: PROVIDE THANK-YOU LEAFLET

INTERVIEWER DECLARATION: I declare that I have conducted this interview in accordance with your instructions.

Signature: _____

	D	D	M	M	Y	Y	INTERVIEWER NO.				Accompanied:	Supervisor	
Date of interview:					1	2					Yes 1 No 2		
	(156)	(157)	(158)	(159)	(160)	(161)	(162)	(163)	(164)	(165)			
Month:	(166)						Day of week:	(167)				Weather (Mainly):	(168)
March	1	July	5				Monday	1	Sunny	1			
April	2	August	6				Tuesday	2	Cloudy	2			
May	3	September	7				Wednesday	3	Showers	3			
June	4	October	8				Thursday	4	Rain	4			
		November	9				Friday	5	Windy	5			
		December	A				Saturday	6					
							Sunday	7					