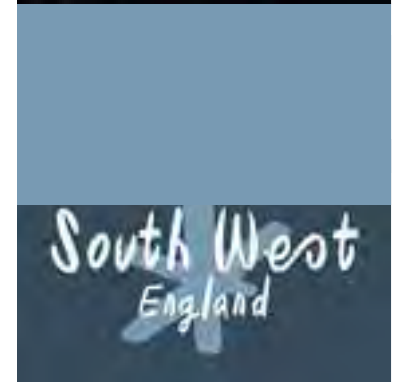
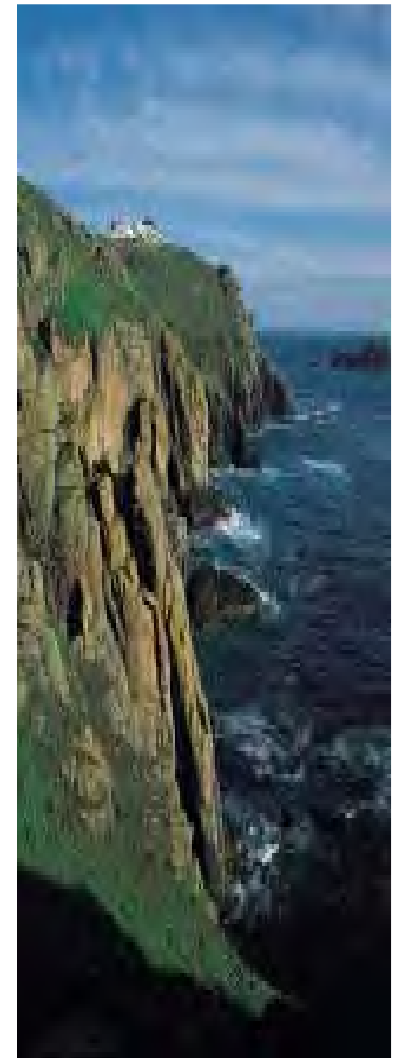


# CORNWALL VISITOR SURVEY 06/07

## Final report

Produced by South West Tourism Research Department  
For and on behalf of Visit Cornwall

September 2007



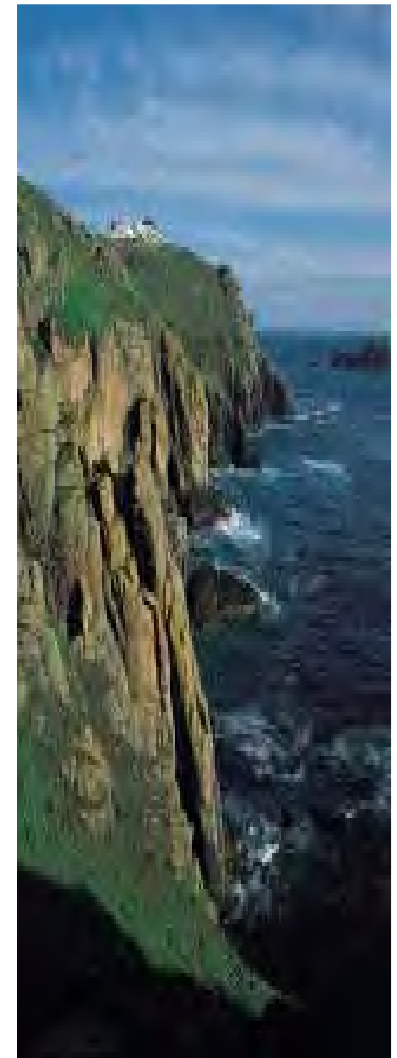
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# **CORNWALL VISITOR SURVEY 2006/7**

## **Executive summary**



South West  
England

# Executive Summary

## Introduction

This report presents the findings of a survey of visitors to Cornwall undertaken between July 2006 and June 2007. The survey was commissioned by Visit Cornwall and was undertaken by South West Tourism Research Department.

The research was designed to provide up-to-date information on the profile of tourism in Cornwall and to compare with the results from previous 2004/5 and earlier surveys (where appropriate) to identify any emerging trends in the profile of tourism in the county. In addition, and for the first time in 2006/7, the survey also explored visitors' attitudes and behaviours around sustainable tourism practices such as car-free travel and the purchasing of locally produced food and drink.



## **Visitor Profile**

Regardless of the time of year, almost all visitors encountered during the survey period were staying overnight in Cornwall during their visit (88%). Visiting groups typically consisted of two adults (58%) with those groups containing children unsurprisingly highest during the summer period. Visitors to the county typically fell into the middle/older age brackets with 58% of all visitors aged 45+ years. Visitors to the county were relatively affluent with 53% classified as ABC1's. Almost all visitors interviewed during the survey period were from the UK with around a quarter (24%) living within the South West region.

## **Characteristics of visit**

The majority of visitors to Cornwall were on a leisure/holiday related visit (85%). Visitors to the county favoured self catering accommodation (43%), followed by serviced hotels/B&B's/inns etc (36%). Booking lead times were high with the majority of visitors booking their accommodation at least one month or more in advance (58%). Average length of stay was high at 6.9 nights. 44% of visitors were on an additional holiday i.e. their current trip was not their main holiday of the year. 9 out of 10 visitors were on a repeat visit to the county. The average number of previous staying trips taken in the county in the last five years was also high at 6.7.



## **Care for the local environment**

Just over a quarter of visitor days spent in Cornwall were car free (28%). Visitors spent an average of 1 hour 38 minutes per day in the county travelling by car. The majority of visitors are happy to try local food & drink if they come across it (42%) but do not go out of their way to find it or visit Cornwall especially for its food & drink.

## **Information sourcing**

Two fifths of visitors relied on previous visits they had made/knowledge they had of the county when obtaining information about holiday in Cornwall whilst around a quarter of visitors (21%) sourced information about holiday in Cornwall over the internet. Brochures/guides/leaflets remained a useful source of information for 15% of visitors. Around three fifths of visitors to Cornwall (62%) had used the internet to book their accommodation. Recognition levels amongst visitors of the [www.visitcornwall.com](http://www.visitcornwall.com) website were good at 44%.

## **Visitor expenditure**

Average expenditure amongst visitors in Cornwall was high at around £40 per person per day/night. Average spending was highest in terms of accommodation (£14.20), eating and drinking (£12.10) and shopping (£8.60) and lowest in terms of entertainment (£1.00) and travel and transport (£3.20).



## **Visitors' views & opinions**

On the whole, visitors appear very satisfied with their overall visitor experience whilst in Cornwall. With the exception of one or two indicators, all the aspects explored by the 2006/7 survey were considered 'good' or 'very good' by visitors regardless of the time of year of their visit. Visitors had the highest opinions of the general atmosphere (4.72), feeling of welcome (4.67), cleanliness of the beach (4.62) and cleanliness of the sea (4.60) in the county. Visitors' opinions were lower in terms of the cost of parking (3.13), ease of parking (3.54), wet weather provision (3.68) and feeling of safety from traffic (3.75)

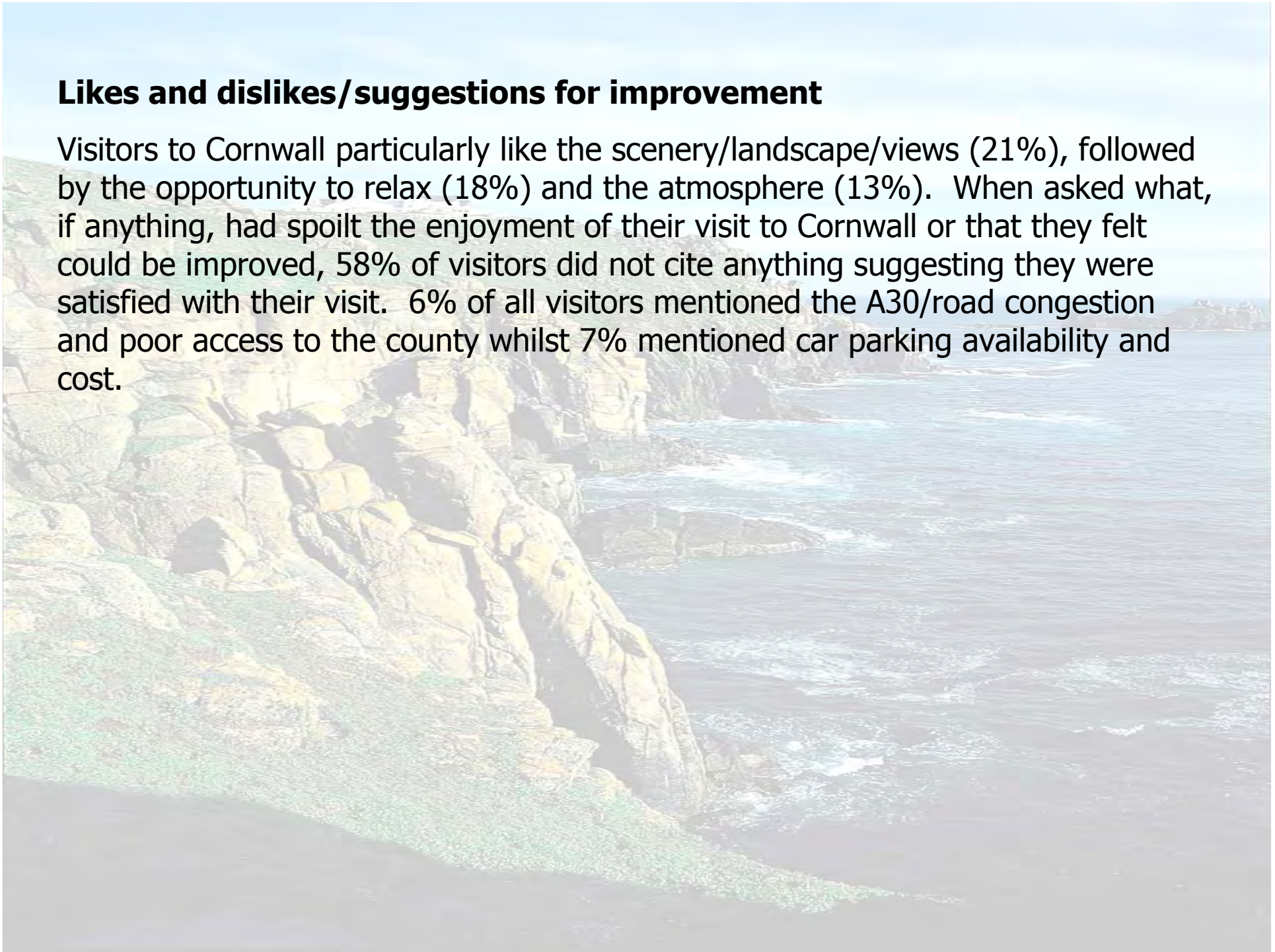
## **Destinations visited and other activities undertaken**

Visitors to Cornwall appear to be keen sightseers visiting a number of different towns in the county, visitor attractions and places of interest. They also participate in a wide range of different activities and outdoor active pursuits during their trip to Cornwall. St Ives and Newquay were the most popular towns which visitors had or were intending to visit during their trip to Cornwall. The Eden Project, Land's End and National Trust/English Heritage properties were the most likely attractions/places of interest to be included in their visit to Cornwall by the largest proportions of visitors. Going for a short walk, shopping and spending time on the beach were the activities visitors to Cornwall were most likely to participate in during their visit to the county.



## **Likes and dislikes/suggestions for improvement**

Visitors to Cornwall particularly like the scenery/landscape/views (21%), followed by the opportunity to relax (18%) and the atmosphere (13%). When asked what, if anything, had spoilt the enjoyment of their visit to Cornwall or that they felt could be improved, 58% of visitors did not cite anything suggesting they were satisfied with their visit. 6% of all visitors mentioned the A30/road congestion and poor access to the county whilst 7% mentioned car parking availability and cost.





# CHAPTER ONE

## Introduction



South West  
England

# Background

This report presents the findings of a survey of visitors to Cornwall undertaken between July 2006 and June 2007. The survey was commissioned by Visit Cornwall and was undertaken by South West Tourism Research Department.

The survey has been undertaken in the county every two years since 1983 and aims to explore a wide range of topics including, amongst other things, the profile of visitors to the county, the characteristics of holiday visits, visitor motivations and satisfaction levels, information sourcing and transportation.

The 2006/7 research was designed to provide up-to-date information on the profile of tourism in Cornwall and to compare with the results from previous 2004/5 and earlier surveys (where appropriate) to identify any emerging trends in the profile of tourism in the county

In addition, and for the first time, the survey explored visitors' attitudes and behaviours around sustainable tourism practices such as car-free travel and the purchasing of locally produced food and drink. In this regard, the survey allows for comparison with South West regional work and establishes a baseline for monitoring.



# Background

For the purposes of data collection and analysis the survey was divided into three data collection periods:

- Summer – July - August 2006 & June 2007
- Autumn/Winter – September - December 2006 & January - February 2007
- Spring – March - May 2007

The report to follow contains the results for the full annual survey, including a breakdown of the results by the three survey periods detailed above.

Where comparative data is available, the 2006/7 results have been compared with those from the 2002/3 and 2004/5 surveys.

# Research Aims & Objectives

**The overall research requirement was for the research to be a sound and reliable assessment of the profile and characteristics of visits made to Cornwall, in order to gain a greater understanding of visitors' experiences, their motivations to visit and information requirements. In addition, to explore the factors which influence these visitors' enjoyment of their visit as it is these 'triggers' that can be usefully leveraged in product development and marketing.**

**The specific objectives of the 2006/7 research were as follows:**

- To provide up-to-date information on the origin, profile and behaviour of visitors to Cornwall and explore the nature of their trips made to the county between July 2006 and June 2007.
- To identify visitors' motivations to visit Cornwall as well as the quality of their visitor experience whilst on holiday in the county i.e. visitor satisfaction.
- To establish visitors' information requirements in advance of making their trip and explore their booking patterns.
- To ascertain mode of transport and visitors' attitudes towards sustainable tourism practices including car-free travel and purchasing locally produced food and drink.
- To provide information on the average level and composition of visitor expenditure in the county.
- To identify key trends in relation to all of the above and, where possible, to compare with previous studies undertaken in Cornwall to identify any long-term and emerging trends so that more informed decisions can be made in relation to marketing initiatives and facility provision, as well as strategic planning.



# Methodology

- A face to face questionnaire survey was conducted by experienced interviewers between 17<sup>th</sup> July and 28<sup>th</sup> June 2007.
- Adults (aged 16+ yrs) were sampled on random basis
- 65 interviewing sessions, each lasting approximately 6 hours – typically between 10 am and 4 pm were undertaken over the survey period.
- A total of 1020 questionnaires were completed. 349 during the summer period (July - August 2006 & June 2007), 437 during the autumn/winter period (September 2006 – February 2007) and 234 during the Spring period (March-May 2007).
- To ensure only 'visitors' to the county were interviewed filter questions were used to exclude residents of Cornwall and those on day visits concerned with their normal work or regular/household shopping.

# Statistical reliability

- All sample surveys are subject to statistical error. The size of this error varies with the sample size and also with the order of magnitude of the research findings being considered.
- The survey results in this report are presented for all visitors and separately for summer, autumn/winter and spring visitors. The table below shows the sample achieved for each type and gives the margins within which one can be 95% certain that the true figures will fall (assuming the sample is random).
- The figures shown are at the 95% confidence limits. Thus, for example, we can be 95% certain that, for all visitors, with a result of 50%, the true percentage is the range 46.3% to 53.7%. For the summer sample, the possible range is wider – between 43.8% and 56.2%. These margins of error shown above should be borne in mind when interpreting the results contained in this report.

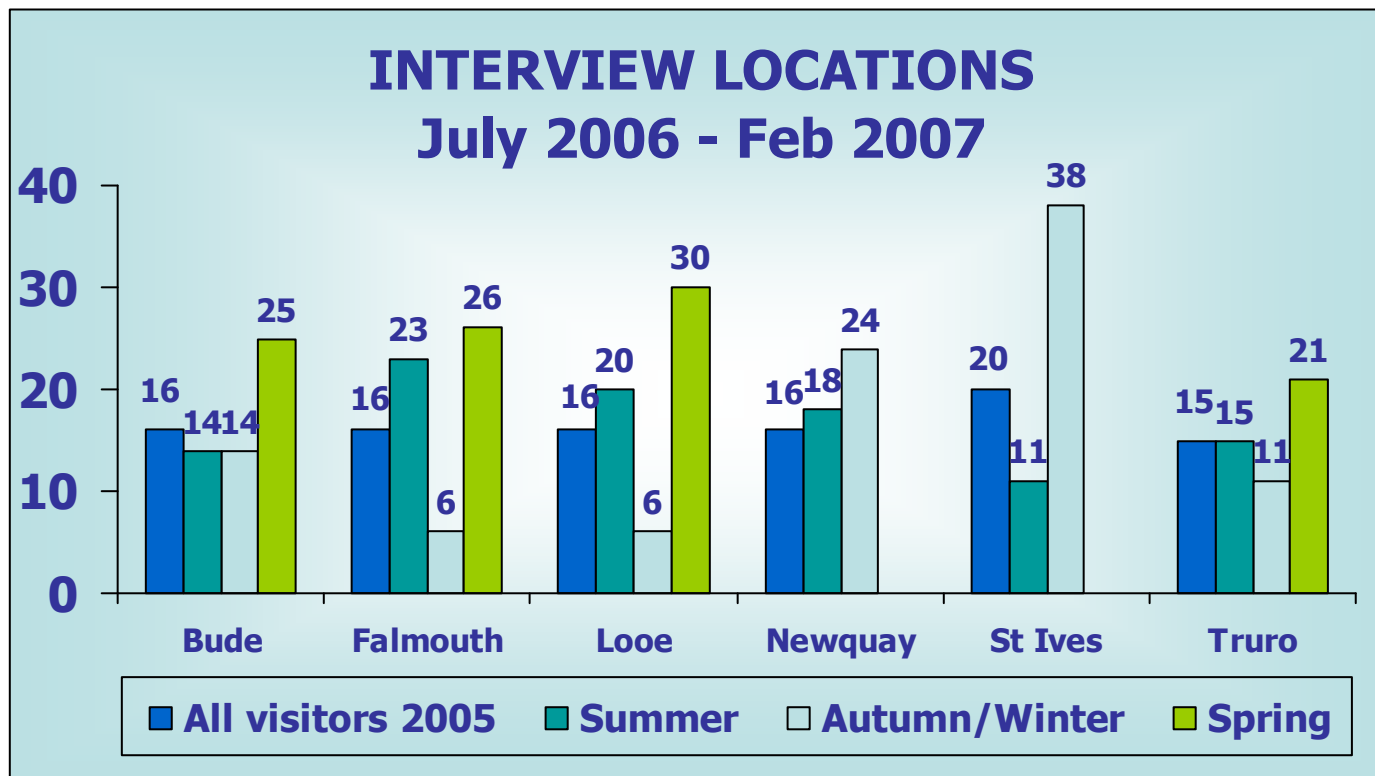
	<b>All Visitors</b>	<b>Summer period</b>	<b>Autumn/winter period</b>	<b>Spring period</b>
<b><i>Research findings</i></b>	<b><i>Sample: 1020</i></b>	<b><i>Sample: 349</i></b>	<b><i>Sample: 437</i></b>	<b><i>Sample: 234</i></b>
<b>10% or 90%</b>	+/- 1.8	+/- 3.1	+/- 2.8	+/- 3.8
<b>20% or 80%</b>	+/- 2.5	+/- 4.2	+/- 3.8	+/- 5.1
<b>30% or 70%</b>	+/- 2.8	+/- 4.8	+/- 4.3	+/- 5.9
<b>40% or 60%</b>	+/- 3.0	+/- 5.1	+/- 4.6	+/- 6.3
<b>50%</b>	+/- 3.1	+/- 5.2	+/- 4.7	+/- 6.4



# Interview locations

For comparison with previous years' Cornwall Visitor Surveys, the 2006/7 interviews have been undertaken in six locations within the county.

The percentage of interviews achieved at each location to date, according to the season of the year are shown below:



# CHAPTER TWO

## Visitor Profile



South West  
England

# Summary

- **Regardless of the time of year, almost all visitors encountered during the survey period were staying overnight in Cornwall during their visit**
- **Groups visiting the county typically consisted of two adults. The proportion of groups containing children was highest during the summer period**
- **Visitors to Cornwall typically fell into the middle/older age brackets**
- **Visitors to the county were relatively affluent**
- **Almost all visitors interviewed during the survey period were from the UK with a significant proportion living within the South West region.**



# Introduction

This chapter summarises the main demographic profile of visitors to Cornwall between July 2006 and June 2007 and reviews the results of a series of questions used to determine this including:

- Type of visitor (day vs. staying)
- Group composition (including number of people in the group and average group size)
- Age group
- Socio economic grouping
- Visitor origins

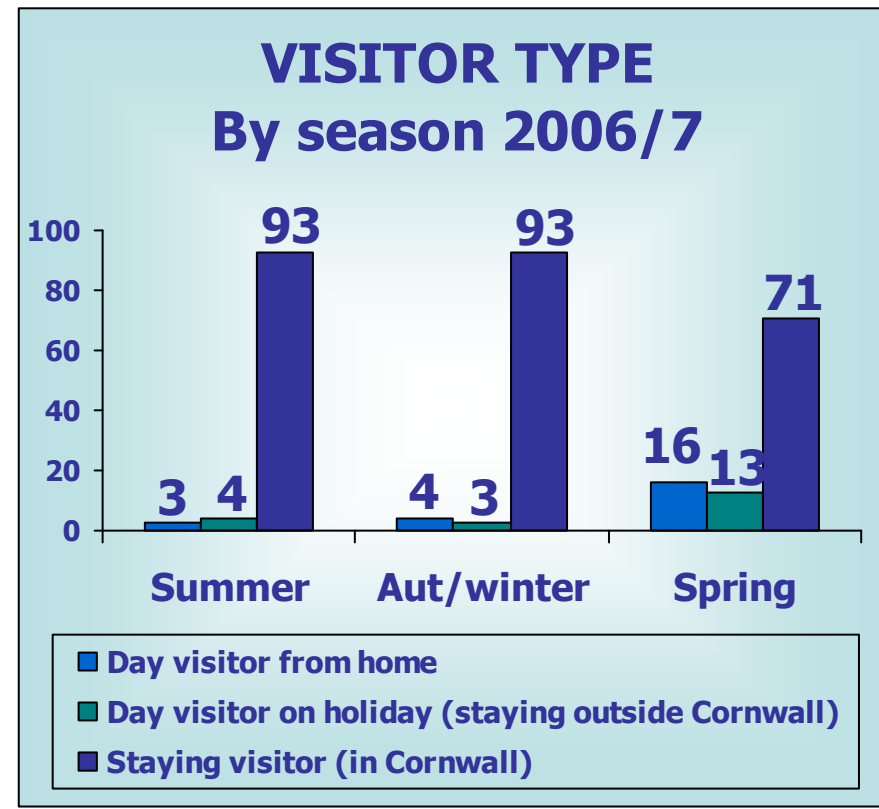
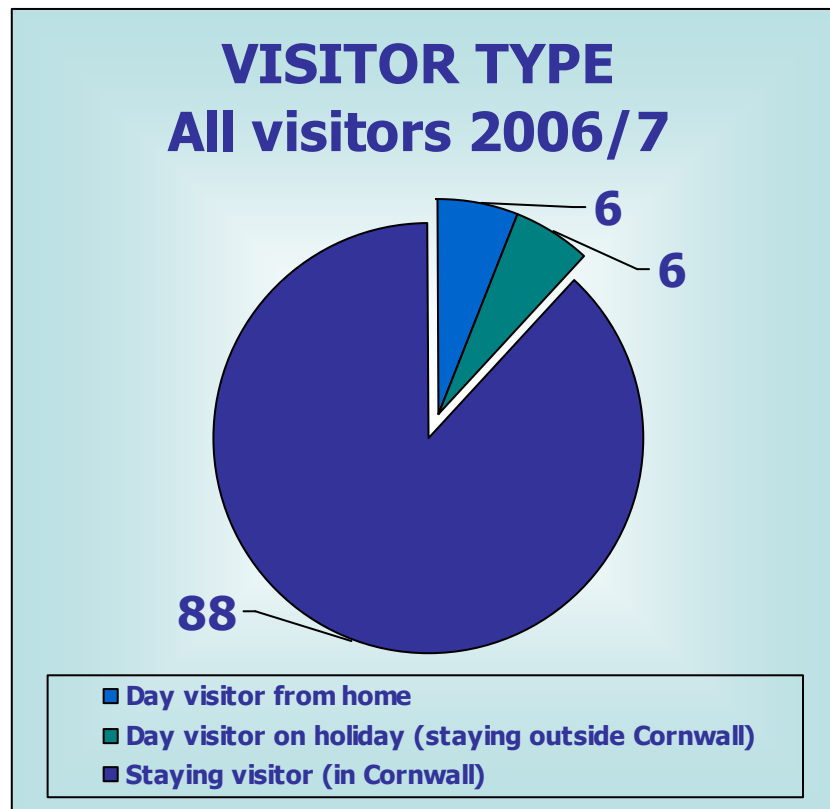


# Type of visitor

Almost all visitors encountered during the survey period were staying overnight in Cornwall.

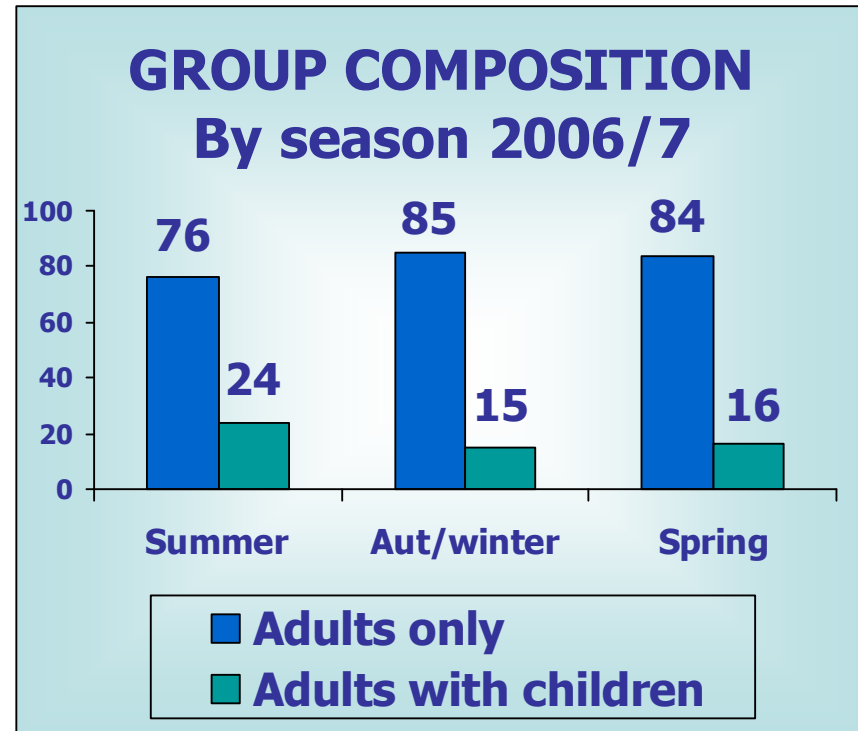
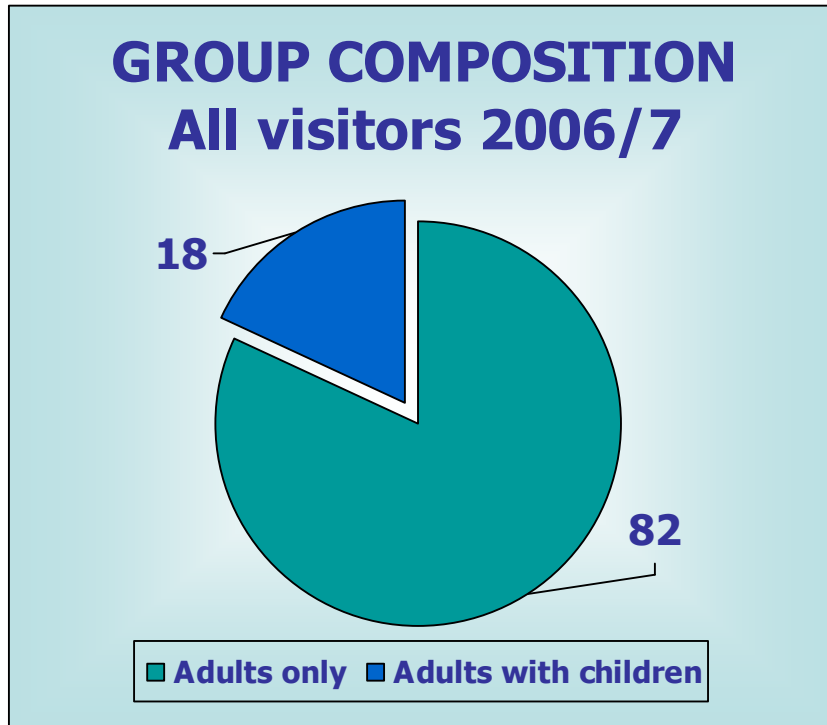
88% of visitors to the county were staying overnight in Cornwall during their visit.

The proportions of day visitors from home and day visitors on holiday encountered during the survey period were very low (6% each respectively). The spring period attracted the highest proportions of day visitors to the county (16% and 13% of day visitors from home and on holiday respectively).



# Group composition

Regardless of the time of year, the majority of groups visiting Cornwall contained adults only.



During the overall survey period around 4 out of 5 groups contained adults only.

Approximately one fifth of groups contained children.

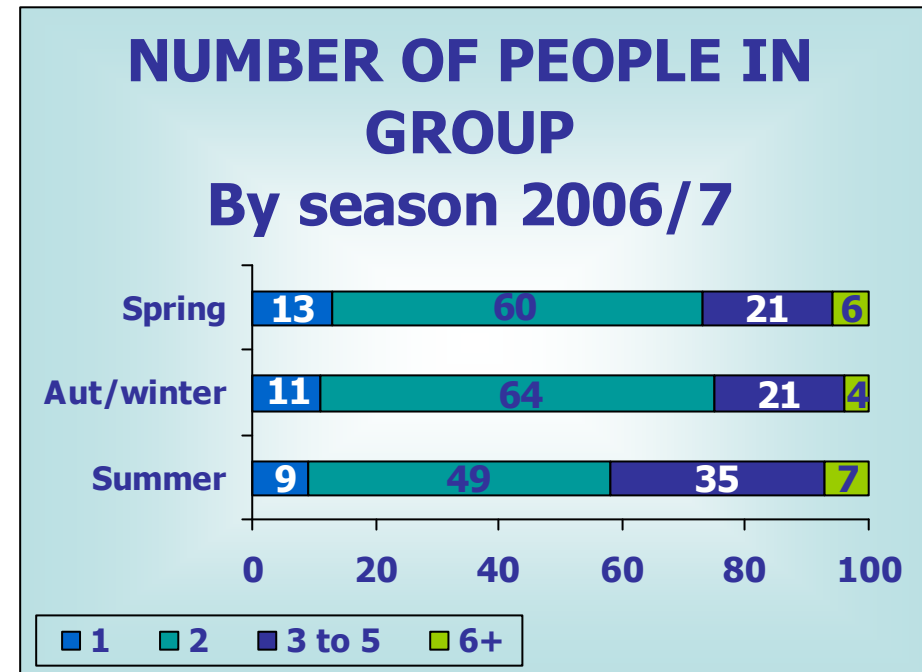
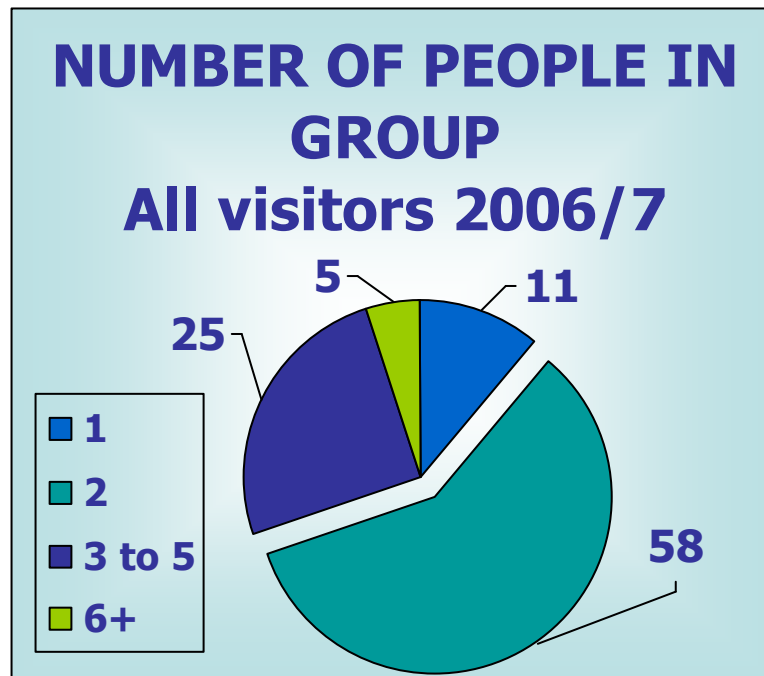
The proportion of groups containing children increased during the summer period to around a quarter (24%) and decreased out of season (15% and 16% during the autumn/winter and spring seasons respectively).



# Number of people in group

All interviewees were asked, including themselves, how many people were visiting Cornwall in their immediate party.

**The largest proportions of groups, irrespective of the time of year, contained two people. Average group size was 2.68 people.** This increased to 2.89 people during the summer months, dropped to 2.49 people during the autumn/winter period and increased again to 2.73 during the spring period.



The proportion of groups containing two people, whilst remaining the largest segment, decreased during the summer months when 35% of groups contained three to five people. In contrast, during the autumn/winter period the proportion of groups containing two people increased to 64%.

# Age group

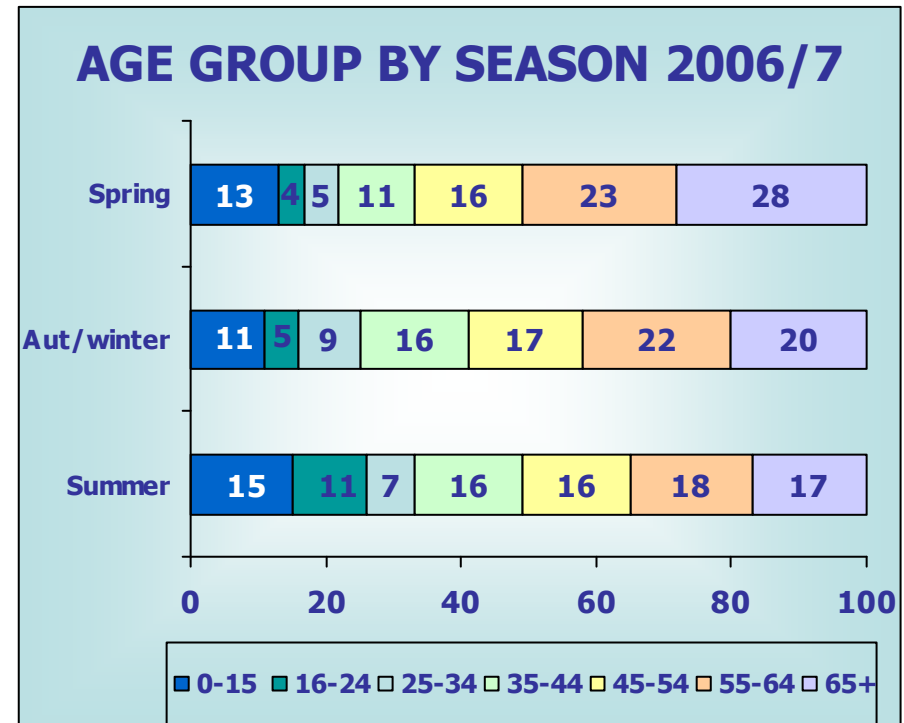
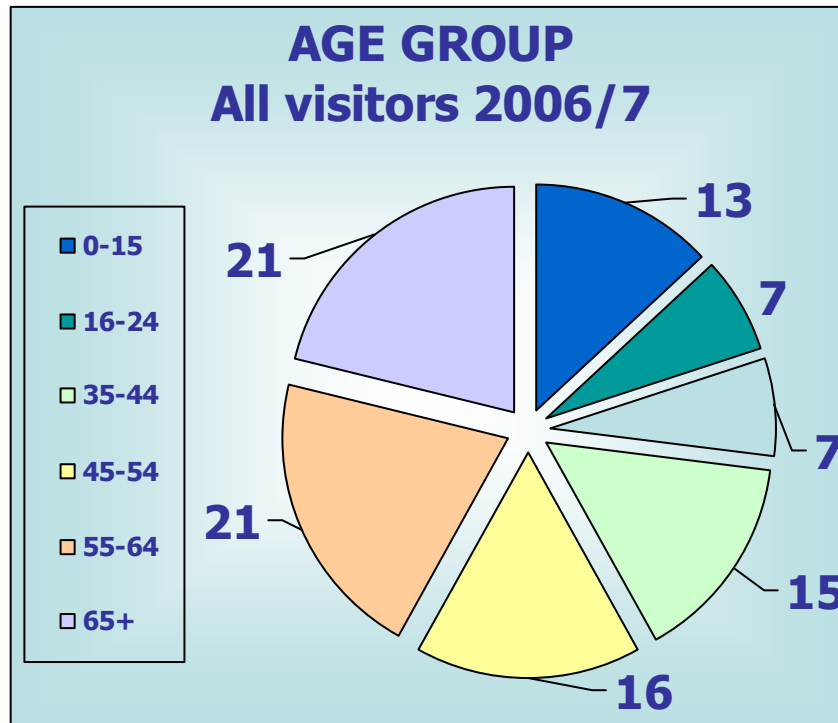
Visitors to Cornwall typically fell into the middle to older age brackets and were aged 45-65+ years. 48% of visitors were males and 52% females.

58% of visitors were aged 45 years or over including 21% aged 65+ years.

42% of visitors were aged under 45 years including 16% aged 35-44 years.

13% of visitors were categorised as children aged 0-15 years.

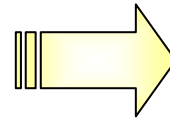
The proportions of younger visitors (aged 44 years or under) increased during the summer period (65%), whilst those visitors aged 45 years or over increased out of season (58% and 67% during the autumn/winter and spring periods respectively).



# Socio-economic grouping

Using the results from the two questions below which explored the main occupation of the chief income earner in the respondents' household it was possible to categorise interviewees into one of four standard socio economic classifications.

"What is/was the principle occupation of the chief income earner in your household in terms of *industry/type of company?*"



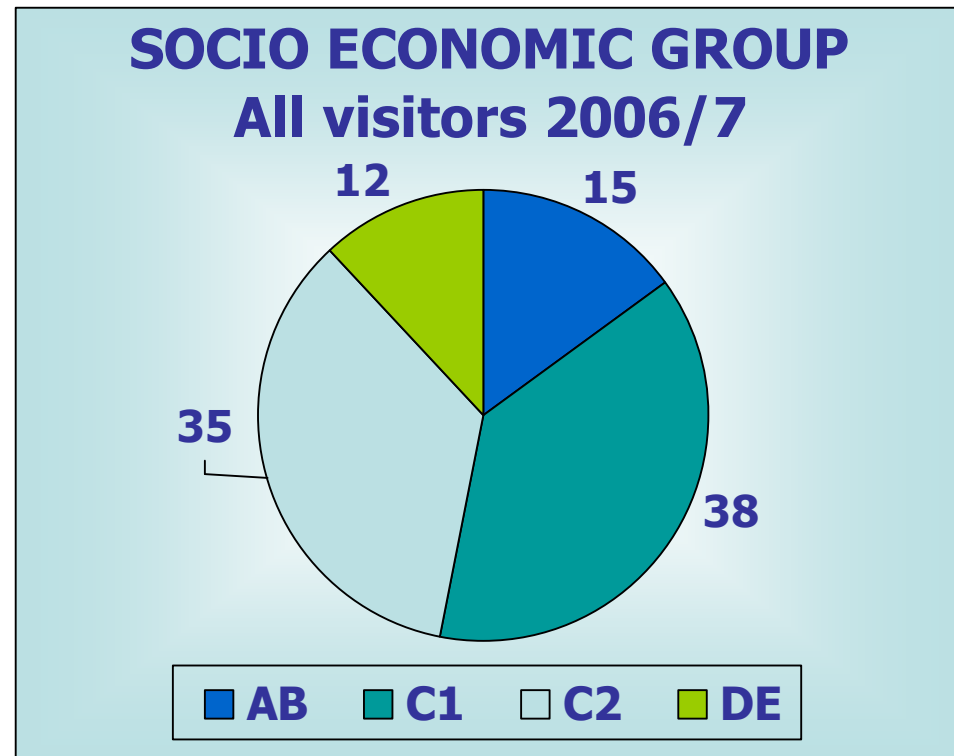
"What is/was the principle occupation of the chief income earner in your household in terms of their *position/job title?*"

**Visitors to Cornwall were relatively affluent.**

53% of visitors were categorised as ABC1's.

Just over a third of visitors fell into socio-economic group C2 (35%) and only 12% were categorised as DE's.

There was little variation in the socio-economic status of visitors according to the time of year when they visited.





# Visitor origins

Almost all visitors encountered during the survey period were UK residents (96%) with around a quarter (24%) living within the South West region (but outside of Cornwall\*).

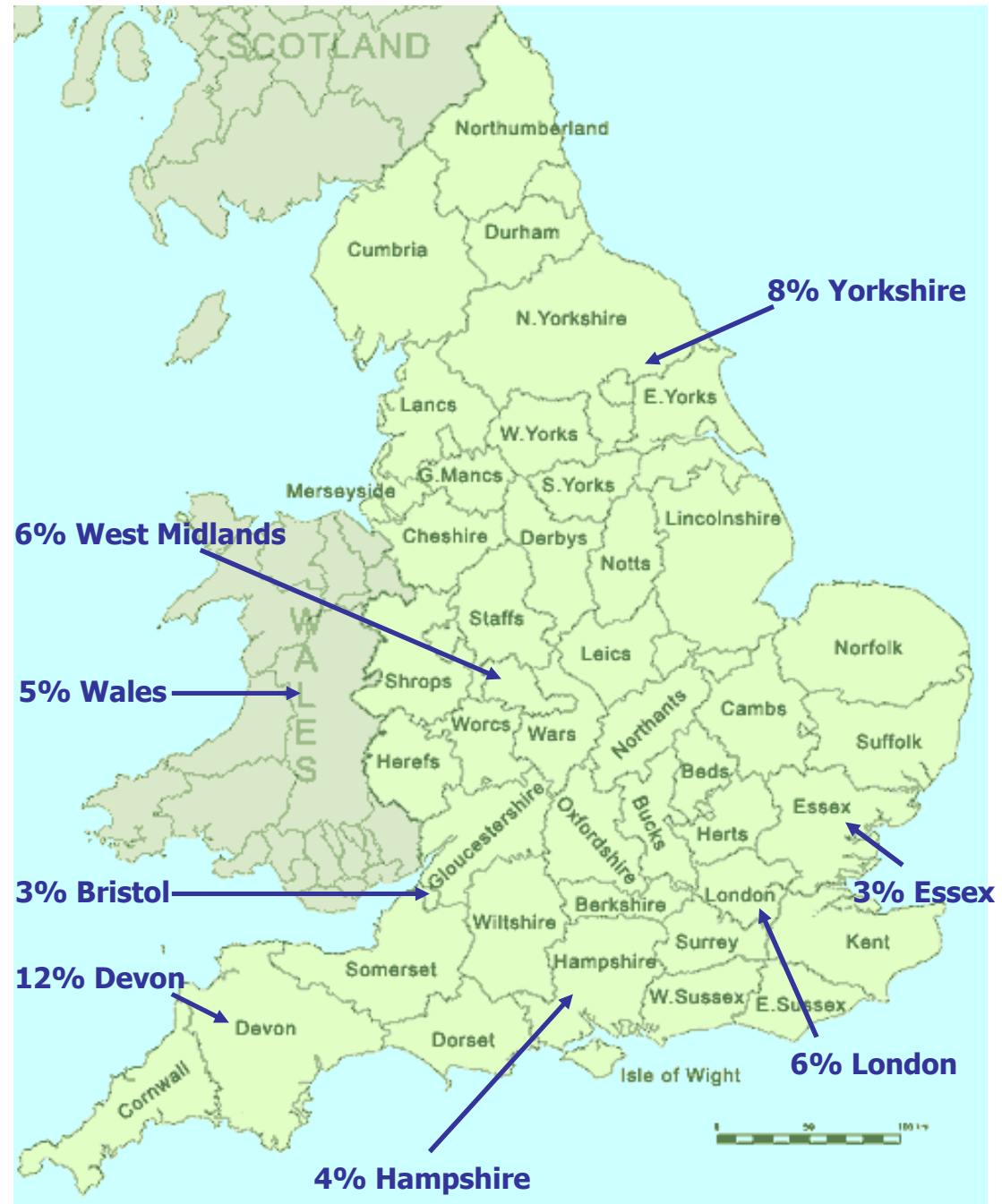
12% of visitors to the county lived in Devon.

The county also received a significant proportion of visitors from the West Midlands (6%), London (6%) and Wales (5%).

4% of visitors to Cornwall were from overseas.

There was little variation in visitor origins according to the time of year in which they visited.

*\* Please note that Cornish residents were excluded from the survey.*



# CHAPTER THREE

## Characteristics of visits



South West  
England

# Summary

- **The majority of visitors to Cornwall were on a leisure/holiday related visit**
- **Visitors to the county favoured self catering accommodation, followed by serviced hotels/B&B's/inns etc.**
- **Booking lead times were high with the majority of visitors booking their accommodation at least one month or more in advance**
- **The county enjoys a high average length of stay amongst visitors of almost 7 nights**
- **The largest proportion of visitors were on an additional holiday i.e. their current trip was not their main holiday of the year**
- **Cornwall attracts a high proportion of loyal, repeat visitors**
- **The average number of previous staying trips taken in the county in the last five years was also high at around 6**

# Introduction

This chapter explores in more detail the nature of these trips made to the county including:

- Reason for visit
- Accommodation used
- Booking lead times
- Nearest town where staying
- Length of stay – staying trips (nights) and day trips (hours)
- Type of visit
- First time/repeat visits
- Transportation



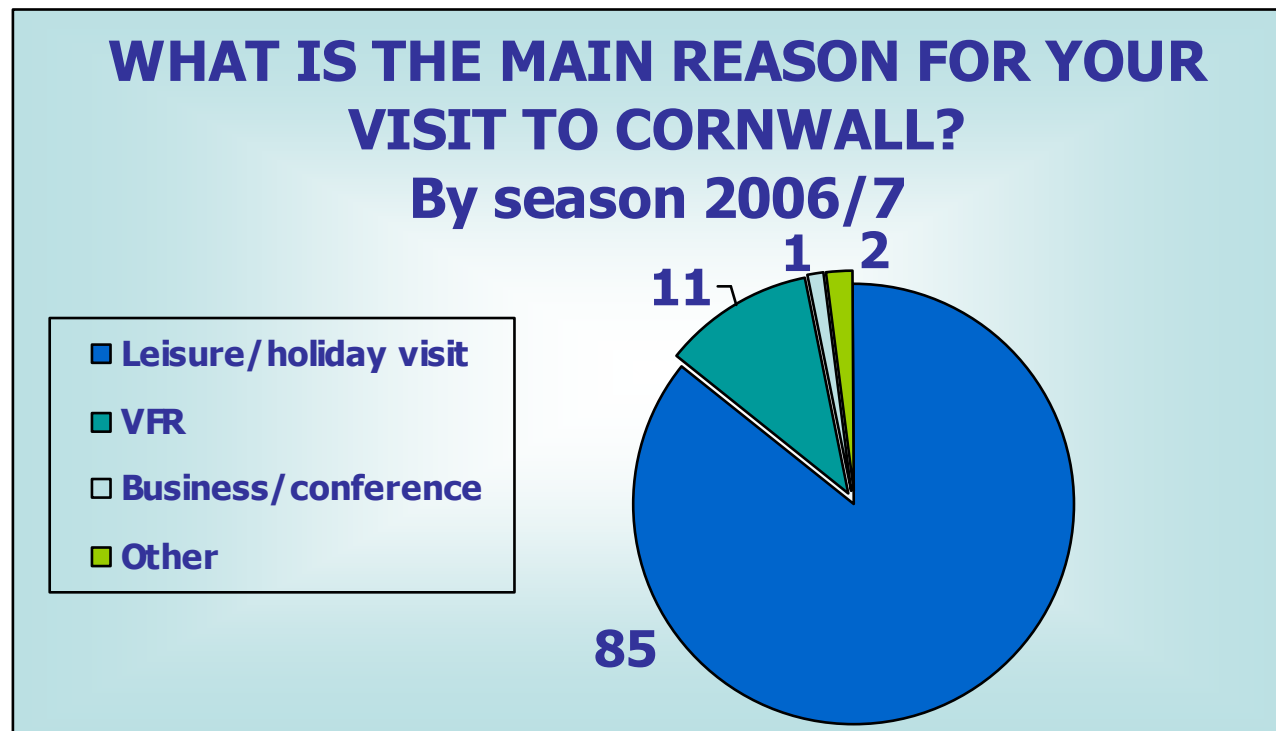
# Main reason for visit

Visitors to Cornwall were typically on a leisure/holiday related visit (85%).

Around 1 in 10 visitors (11%) was on a visit to see friends or relatives who lived in the county.

A higher proportion of visitors on a short break (1-3 nights) to the county were visiting friends or relatives (22%) compared with those visitors on a main (6%) or additional holiday to Cornwall of four or more nights (10%).

There was little variation in visitors' reason for visiting the county according to the time of year when they made their visit.



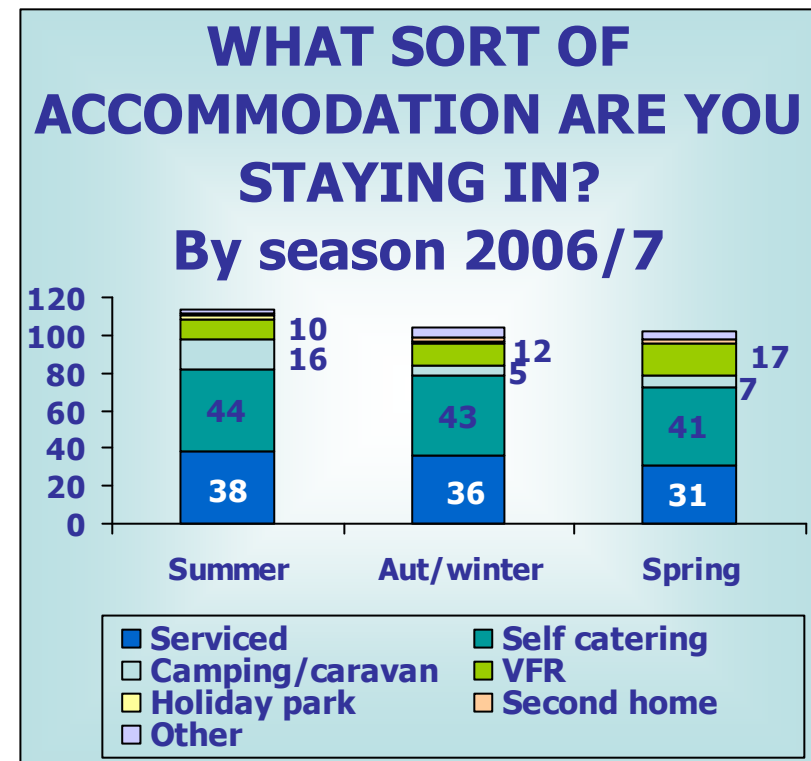
For a full list of the 'other' main reasons for visit see Appendix 2.

# Accommodation (staying visitors)

The most popular choice of accommodation amongst visitors to the county was self catering accommodation (43%). This was especially favoured by those visitors on their main holiday of the year – 55% of who stayed in this type of accommodation.

36% of visitors were staying in serviced accommodation with this choice of accommodation highest amongst those on a short break (45%).

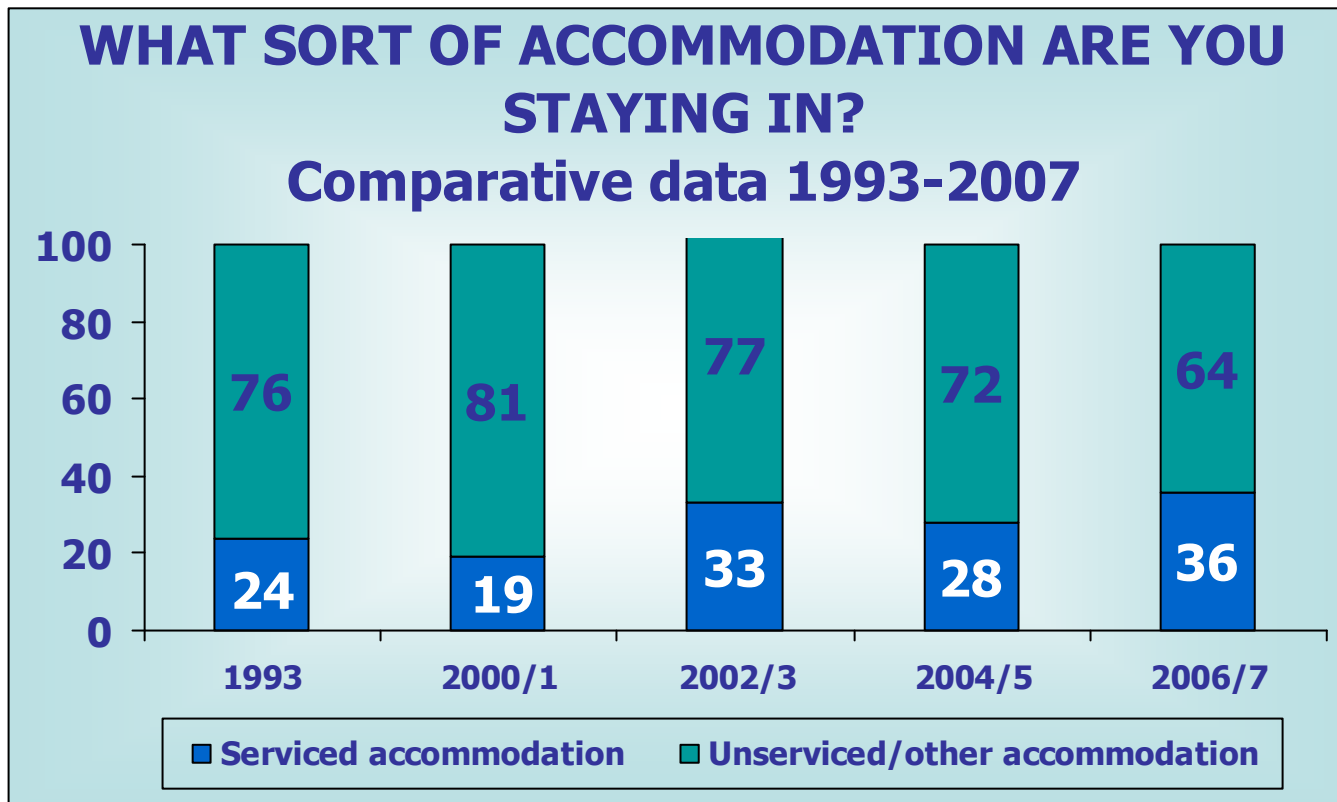
Around one in ten visitors in each case were camping/caravanning or staying in the home of a friend or relative. Approximately three times as many summer visitors were camping/caravanning compared with those visiting the county during the autumn/winter months.



For a full list of the 'other' types of accommodation used by visitors see Appendix 2.

# Accommodation – trend data

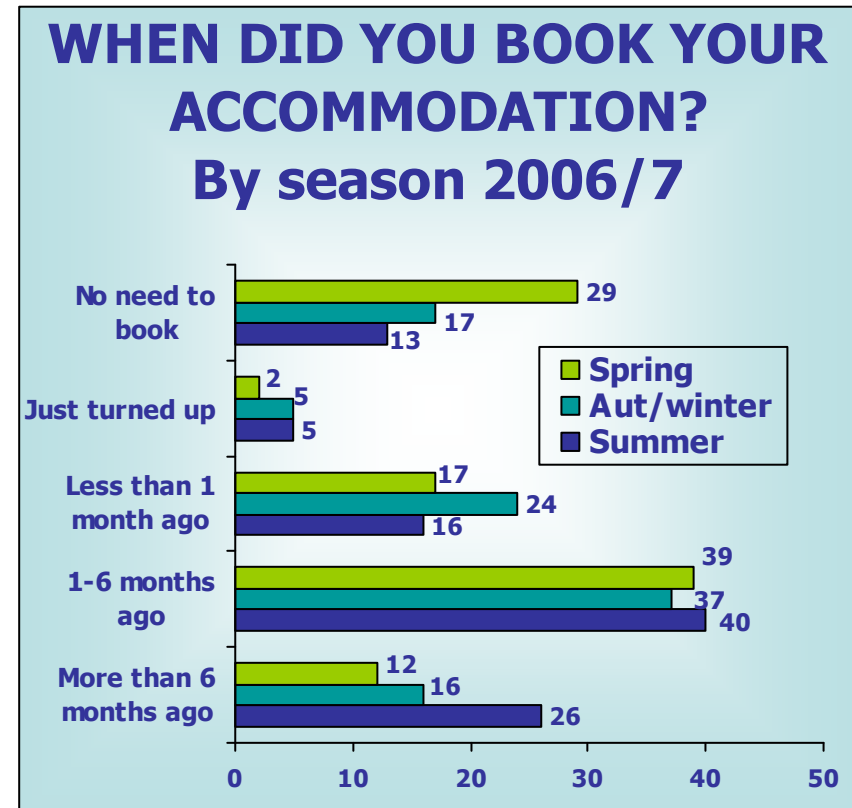
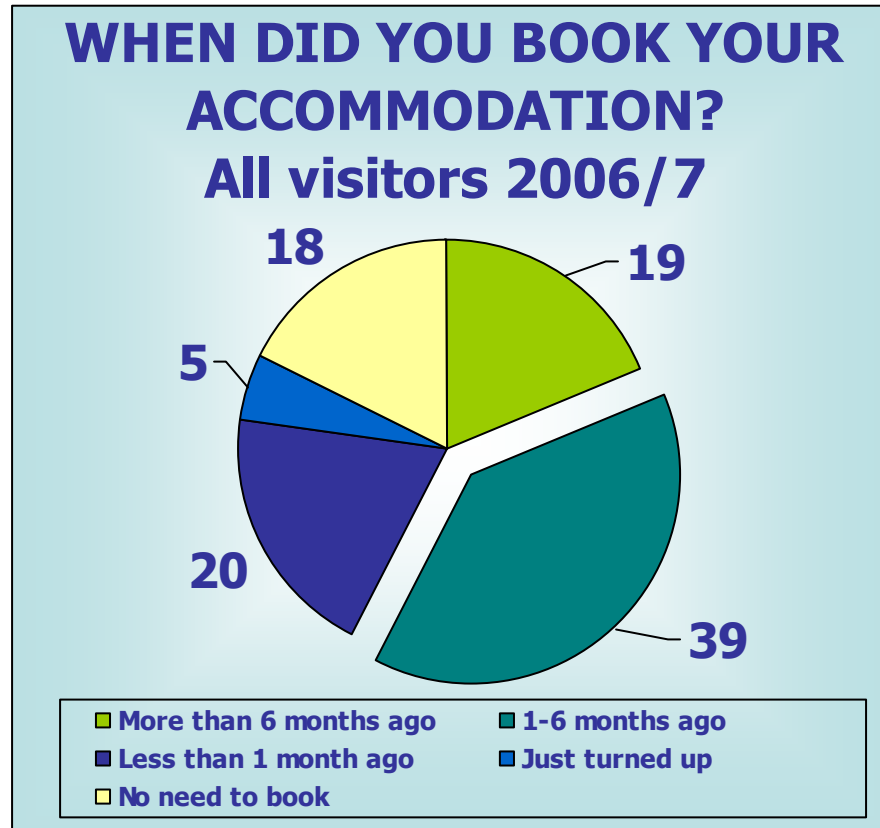
2006/7 saw an increase in the proportion of visitors choosing to stay in serviced accommodation in the county (36%) compared with only 28% of visitors during 2004/5 and 33% during 2002/3.



For a full list of the 'other' types of accommodation used by visitors see Appendix 2.

# Booking lead times

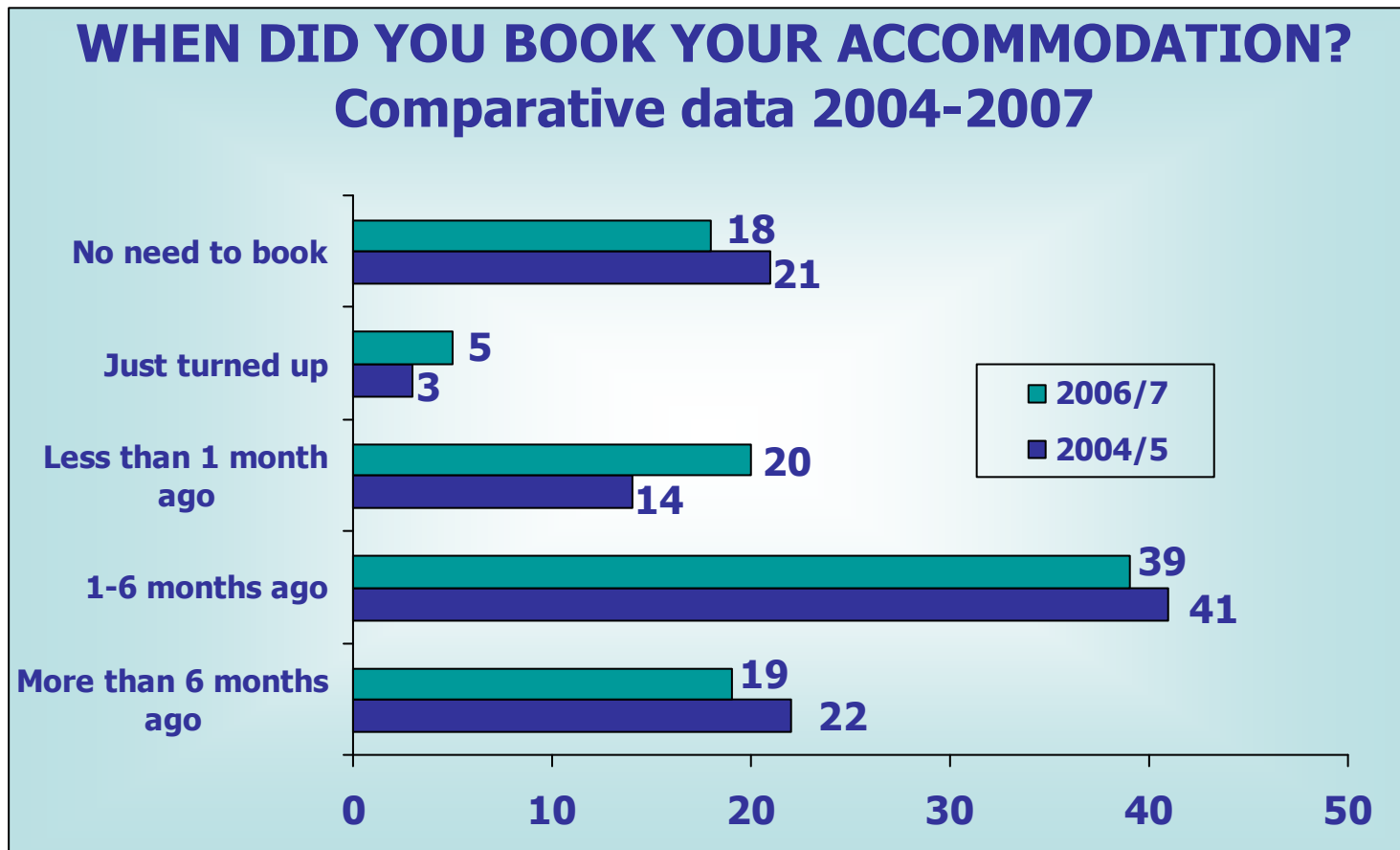
Visitors to Cornwall typically booked their accommodation well in advance of their actual visit.



19% of visitors had booked their accommodation more than 6 months in advance and a further 39% 1-6 months ago. Summer visitors were the most likely to book their accommodation in advance when demand for accommodation during the peak period would have been at its highest. Visitors on their main holiday of the year were also most likely to book their accommodation in advance.

# Booking lead times – trend data

There has been relatively little change in booking lead times between 2004/5 and 2006/7.





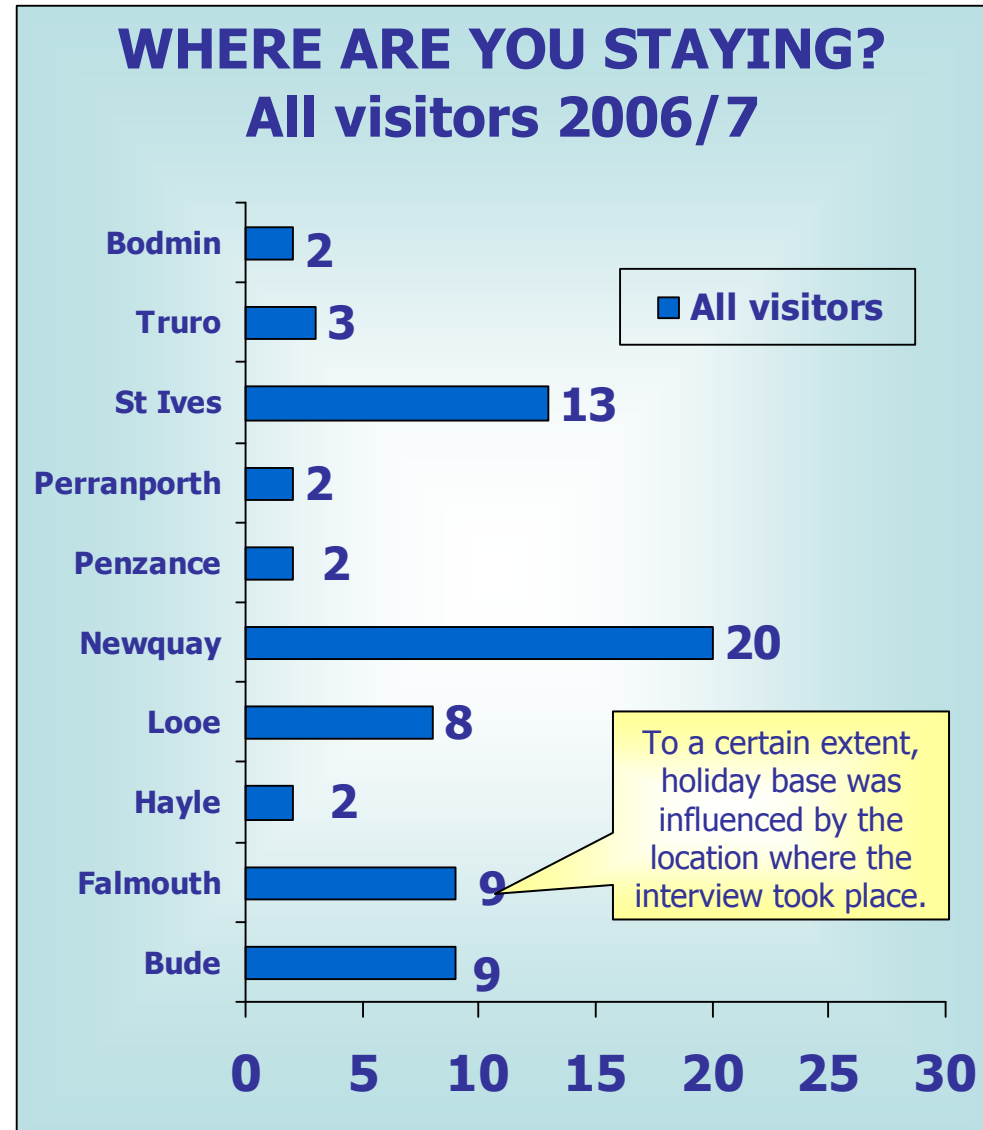
# Holiday base

Newquay, St Ives, Bude and Falmouth were the most popular holiday bases used by visitors, however, this result was largely influenced by the location where the interviews took place and the time of year.

One fifth of visitors were staying in Newquay, 13% in St Ives and 9% in Bude and Falmouth respectively.

8% of visitors were staying in Looe.

The choice of holiday location varied significantly according to the time of year – see separate chart overleaf.

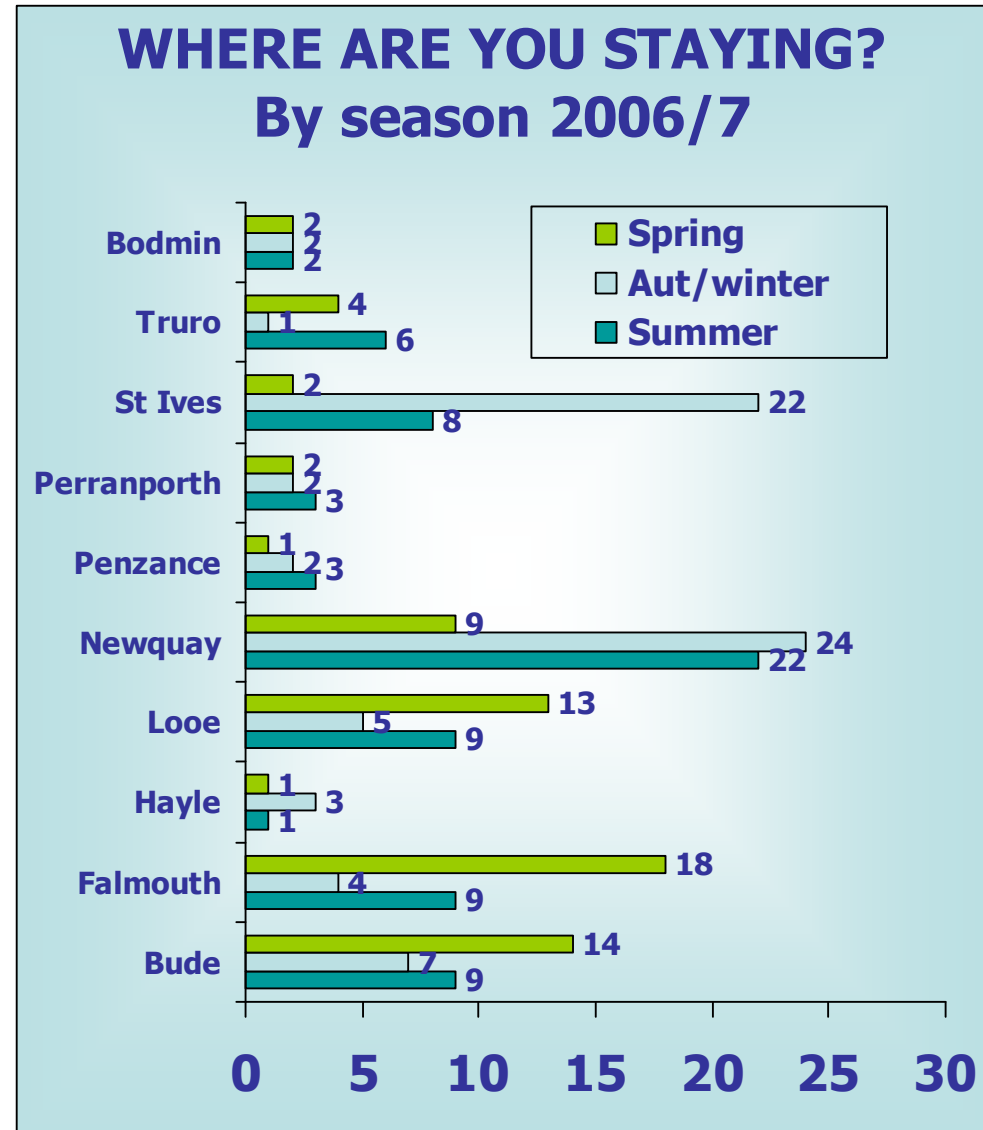


# Holiday base

22% of visitors to Cornwall during the summer months were staying in Newquay, along with around a quarter of visitors during the autumn/winter. Only 9% of visitors during the spring were staying in the resort.

St Ives was an equally popular choice of where to stay amongst visitors during the autumn/winter (22%).

Falmouth was the most popular choice of where to stay amongst visitors to the county during the spring (18%).



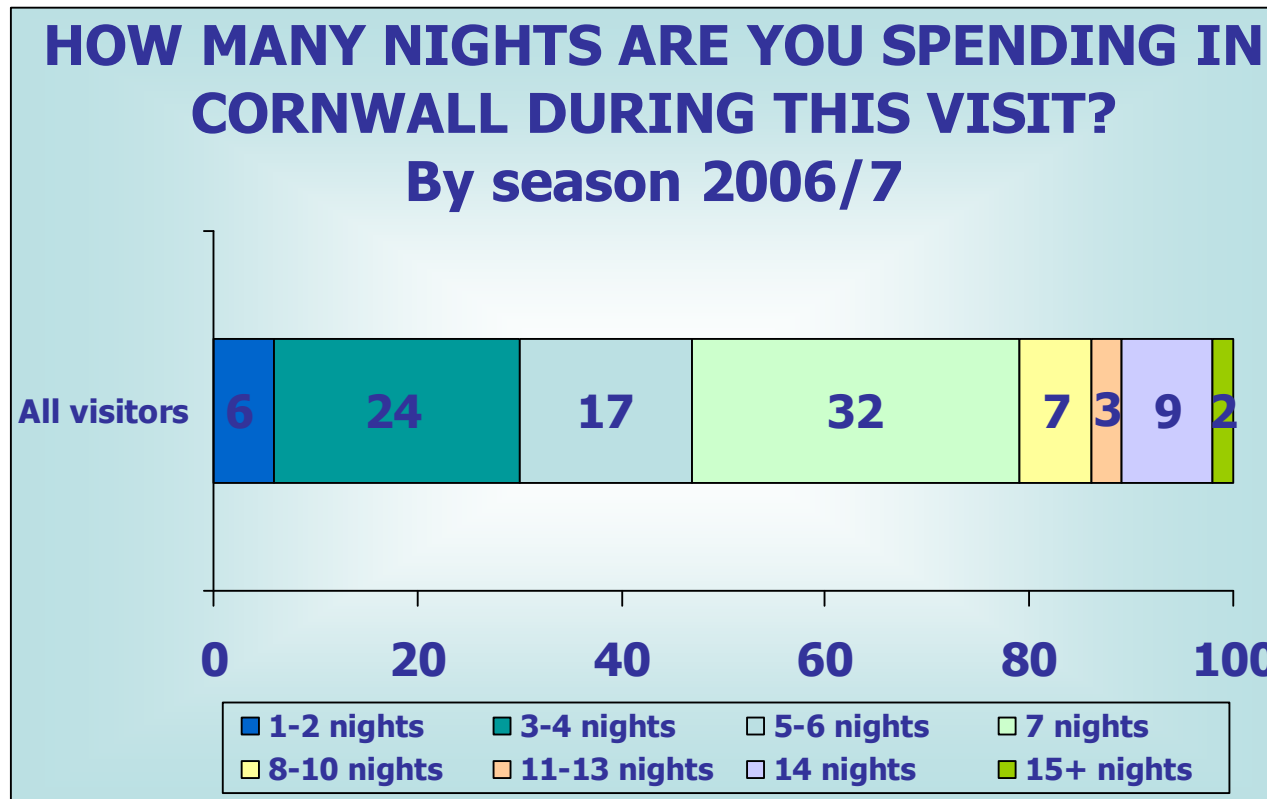
# Length of stay

**Average length of stay in the county was relatively long at just under 7 nights.**

Just under a third of visitors (32%) were on a 7 night stay, whilst a further 23% were staying for 8 or more nights.

13% of visitors were on a short break of 1-3 nights.

The proportion of 7 night stays increased during the summer period. In contrast, short breaks (3-4 nights) increased during the autumn/winter months.

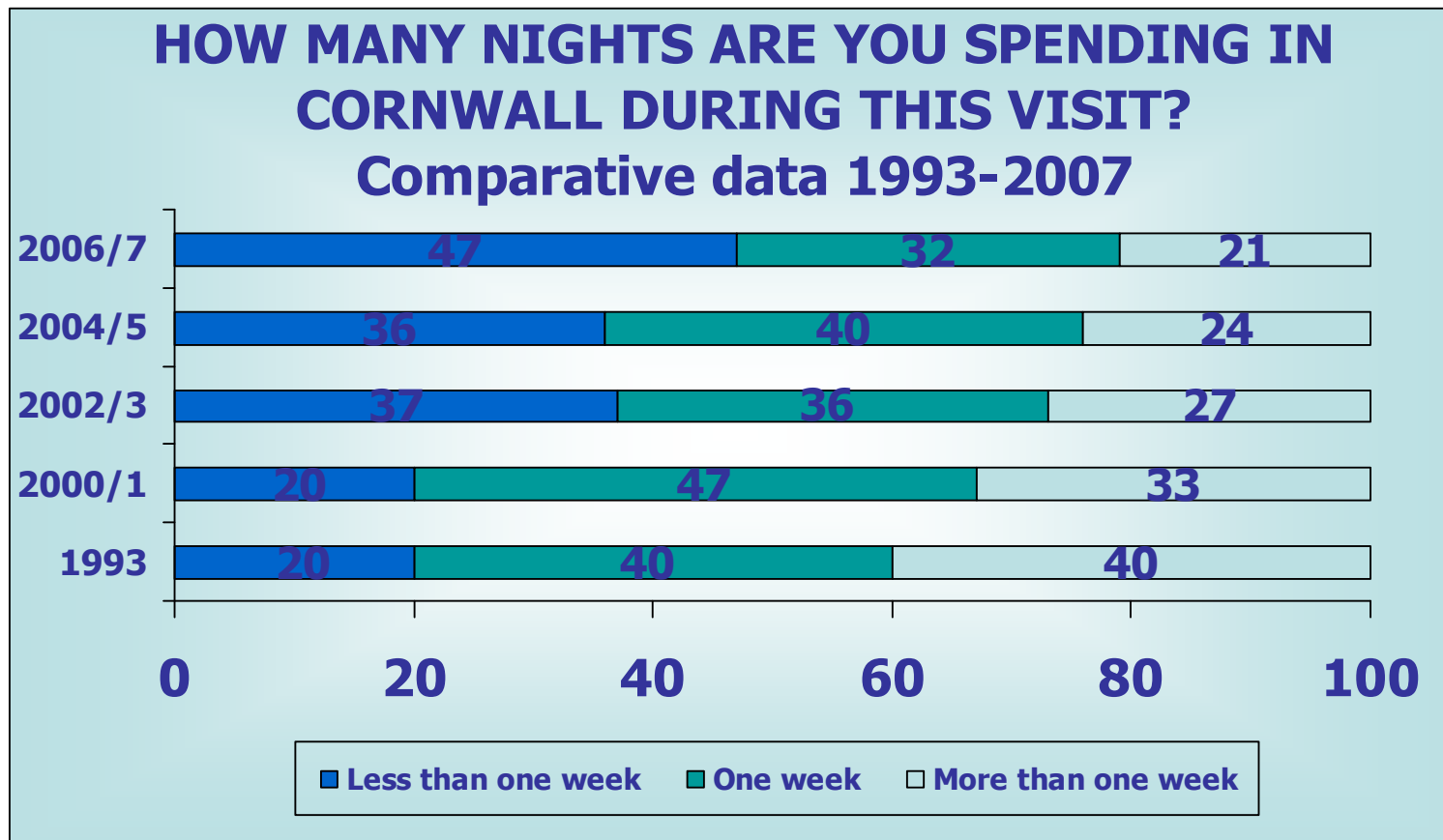


**Average length of stay was 6.9 nights for the overall survey period.**  
This increased to 8.0 nights during the summer months, dropped to 5.8 nights during the autumn/winter period and increased again to 6.7 nights during the spring.

Those visitors on their *main* holiday of the year were spending an average of 10.0 nights in Cornwall, whilst for visitors on an *additional* holiday this average was considerably less at 7.3 nights.

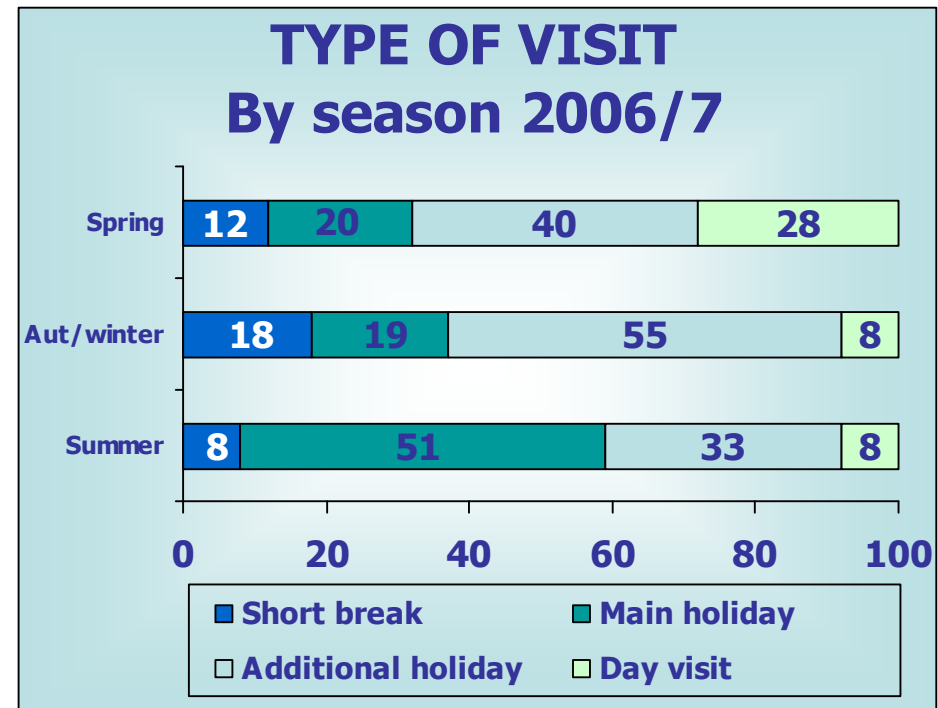
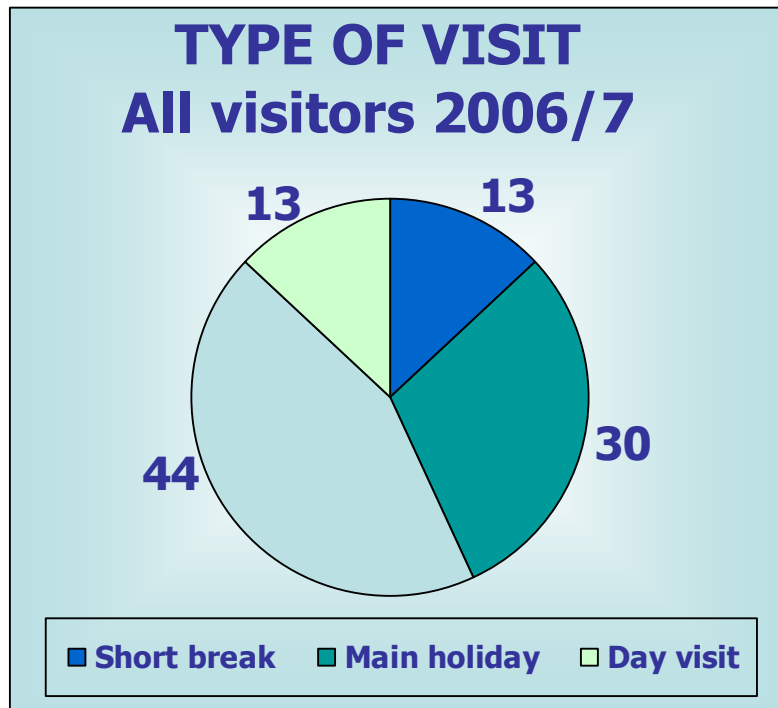
# Length of stay – trend data

A higher proportion of visitors to the county during 2006/7 were staying for less than one week (47%) compared with those visitors during the 2004/5 and 2002/3 survey years. In contrast, fewer 2006/7 visitors were staying for one week or more than one week when compared with previous survey years.



# Type of visit

Over two fifths of visitors (44%) were on an additional holiday in the county, i.e. this trip was not their main holiday of the year.



Just under a third of visitors (30%) were on their main holiday of the year and this proportion rose to 51% of visitors during the summer period.

13% of all visitors were on a short break in the county of 1-3 nights.

13% of visitors were on a day trip (either from home or from a nearby holiday base outside the county) 37

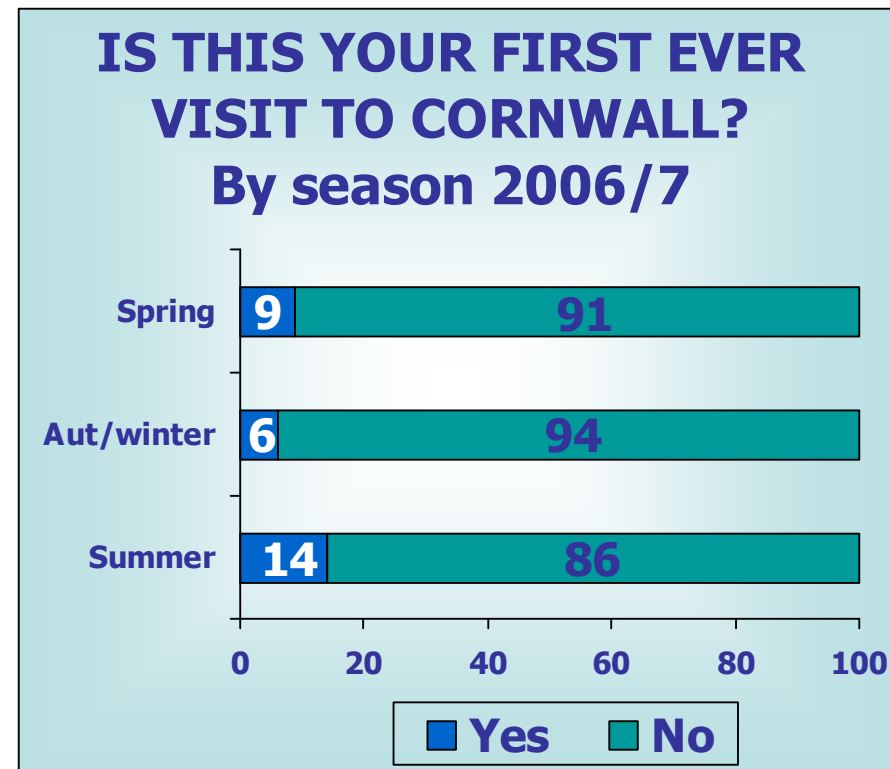


# First time/ repeat visits

**Cornwall attracts a very high proportion of repeat visitors.**

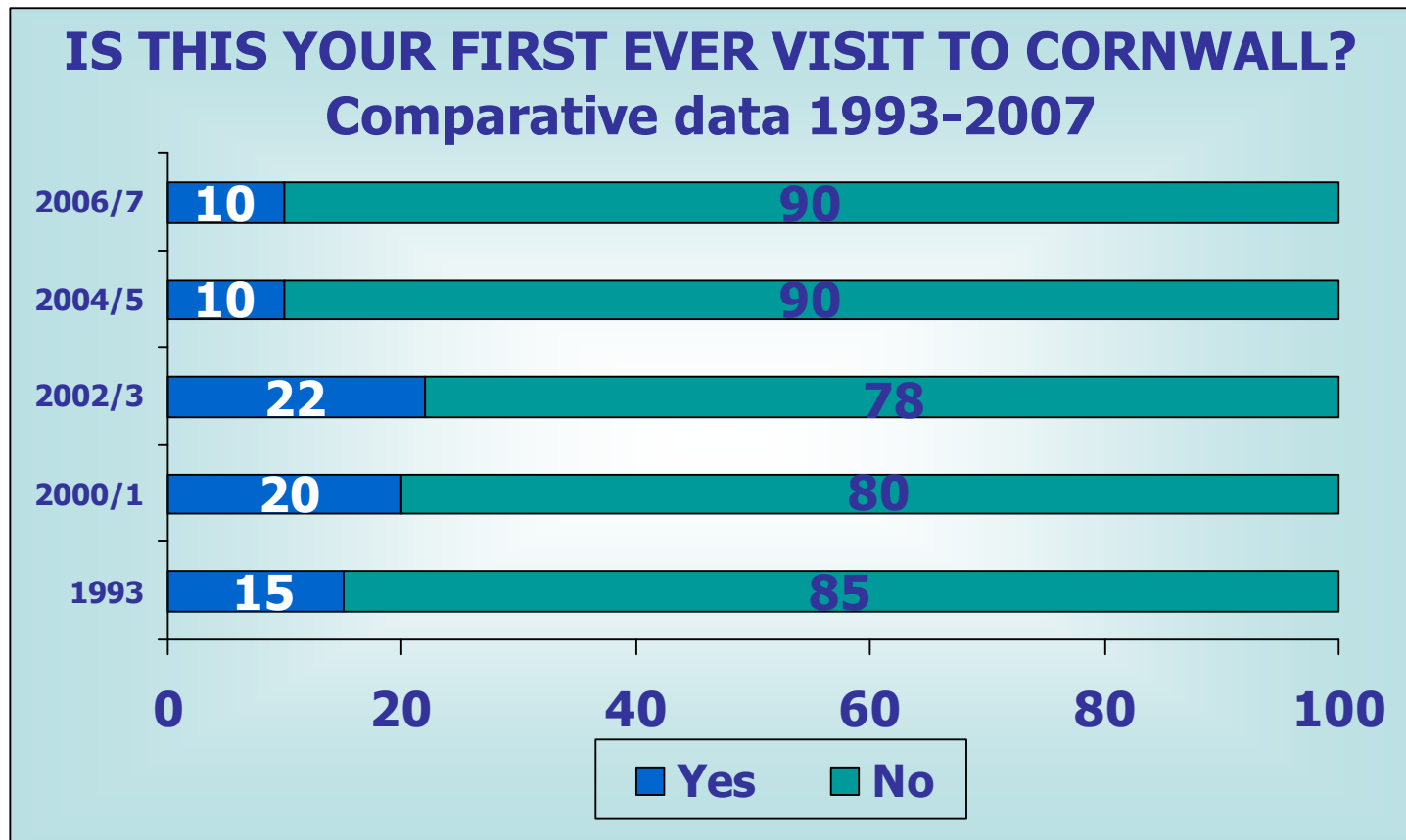
9 out of 10 visitors were on a repeat visit to the county, whilst the remaining 10% were first time visitors to Cornwall.

The proportion of first time visitors rose during the summer months to 14%, more than double the proportion for whom this was the case during the autumn/winter and amongst those visitors on their main holiday of the year to Cornwall (16%).



# First time/repeat visits – trend data

There has been little change in the proportion of first time visitors to the county since 2004/5. 1 in 10 visitors were on a first time visit, the same proportion as during 2004/5 but less than half the proportion for whom this was the case during 2002/3.

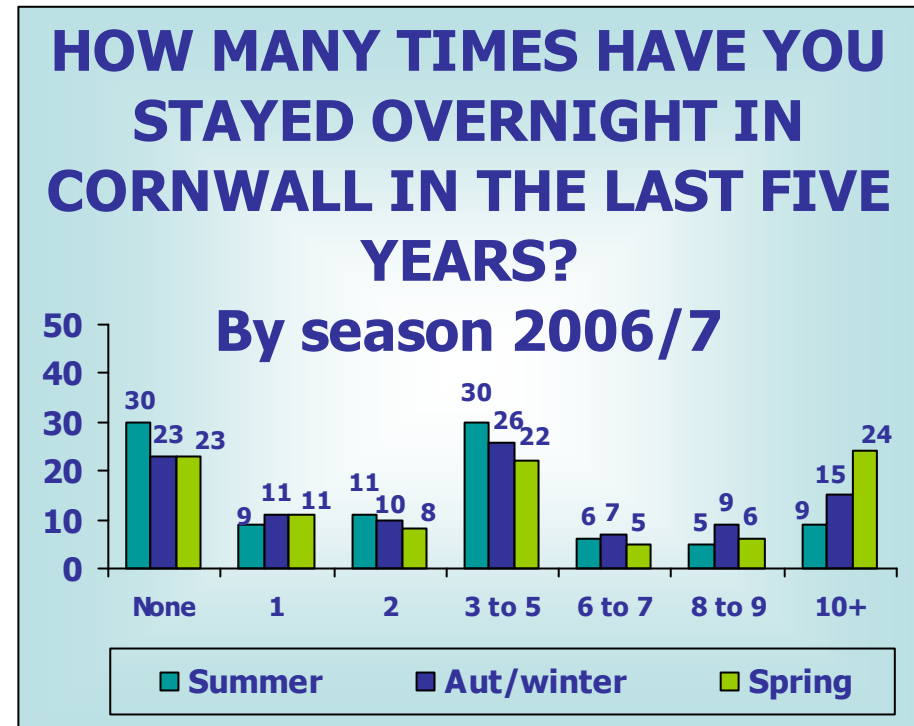
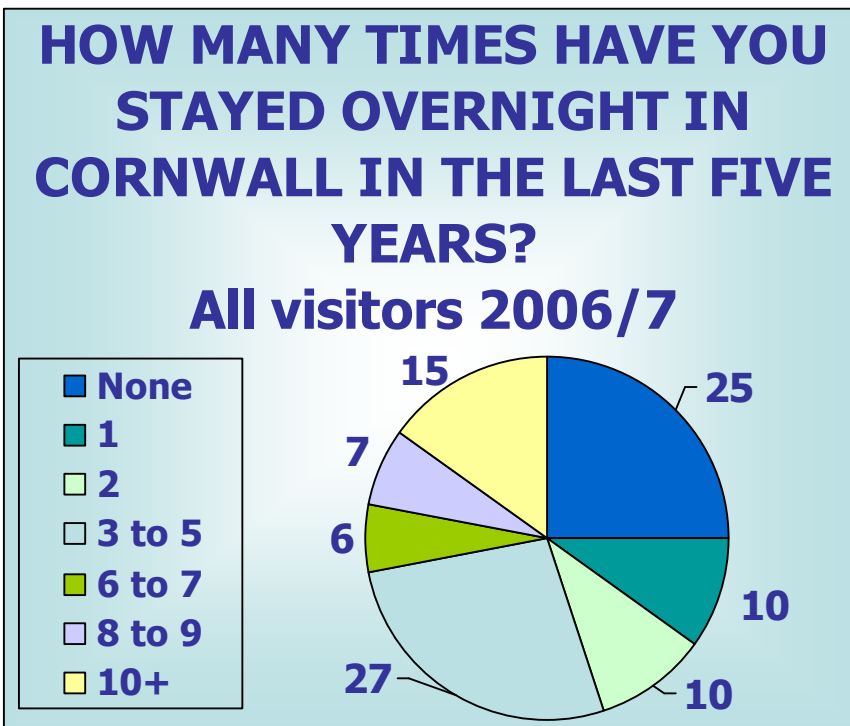


# Previous staying visits in last 5 years

The number of overnight trips made to Cornwall in the last five years by those visitors staying overnight in the county on their current trip was high demonstrating a good level of customer loyalty.

55% of staying visitors had made 3 or more overnight trips to Cornwall in the last five years including 15% who had visited 10 or more times.

A quarter of staying visitors were on an overnight trip to the county for the first time in five or more years.

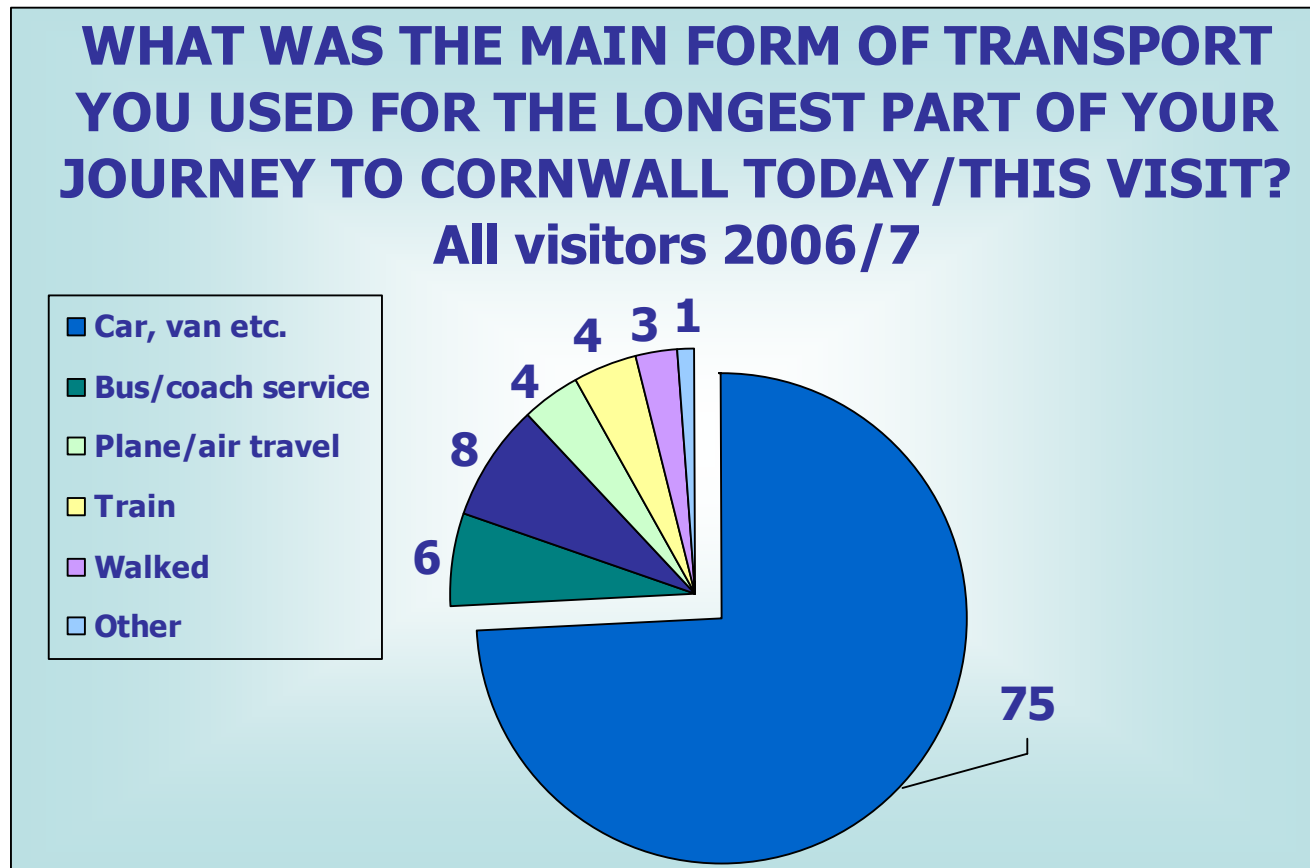


Overall, staying visitors had made an average of 6.7 previous overnight trips to the county in the last five years. This varied from 5.2 previous overnight trips by summer visitors, 6.4 by autumn/winter visitors and 6.5 by visitors to the county during the spring. 40

# Transportation

The car/van/motorcycle etc. remained the most popular choice of transport for the longest part of visitors' journey to Cornwall.

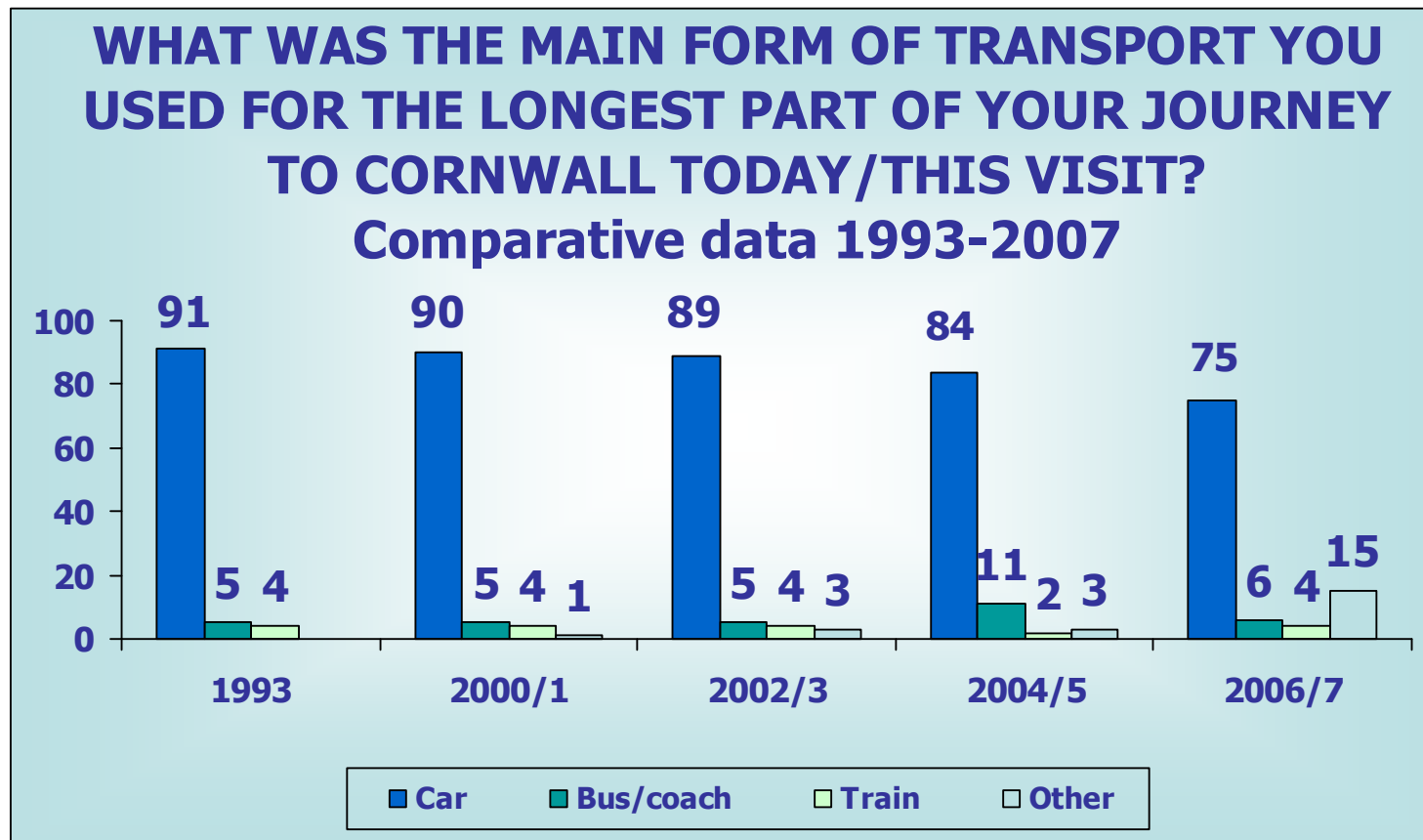
Three quarters of visitors arrived by car, van, motorcycle etc, 6% by bus/coach service and a further 8% as part of an organised coach tour. This was little variation in transport preference according to the time of year of the visit.



For a full list of the 'other' forms of transport used by visitors see Appendix 2.

# Transportation – trend data

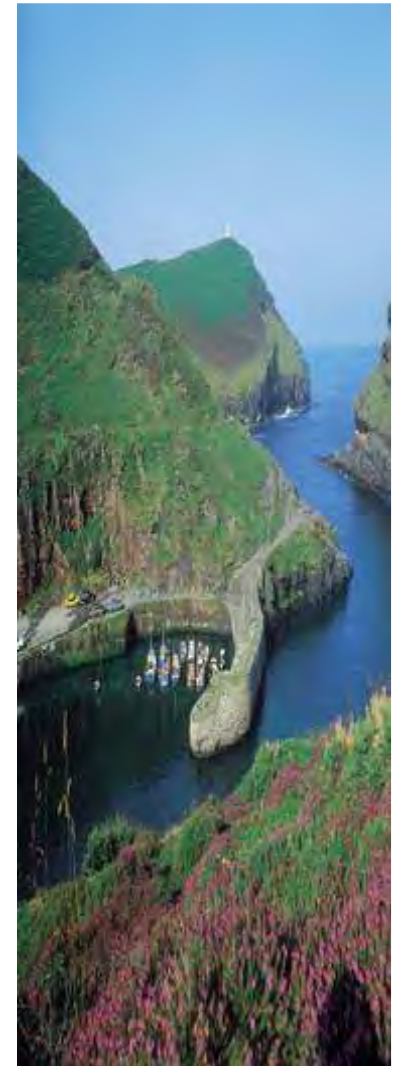
Encouragingly, the proportion of visitors arriving in the county by car during 2006/7 has decreased significantly compared with the 2004/5 and 2002/3 survey years to 75%. 15% of visitors arrived by an 'other' mode of transport compared with only 3% of visitors during the 2002/3 and 2004/5 surveys respectively.





# CHAPTER FOUR

## Care for the local environment



South West  
England

# Summary

- **Just over a quarter of visitor days spent in Cornwall were car free**
- **Visitors spent an average of 1 hour 38 minutes per day in the county travelling by car**
- **The majority of visitors are happy to try local food & drink if they come across it but do not go out of their way to find it or visit Cornwall especially for its food & drink.**



# Introduction

This chapter reviews respondents' answers to a series of questions designed to examine attitudes and behaviour around two key areas regarding minimising the negative impacts of tourism on the local environment:

- Car free travel while in Cornwall
- Purchase of local food & drink



# Car free travel

Three questions were used in the survey to explore the level of car free travel amongst visitors during their visit to Cornwall. The first two questions established the proportion of car free days experienced, whilst the third established the average number of hours a day that visitors had spent travelling by car.

**“What is the total number of days to date you have spent in Cornwall during THIS VISIT?”**

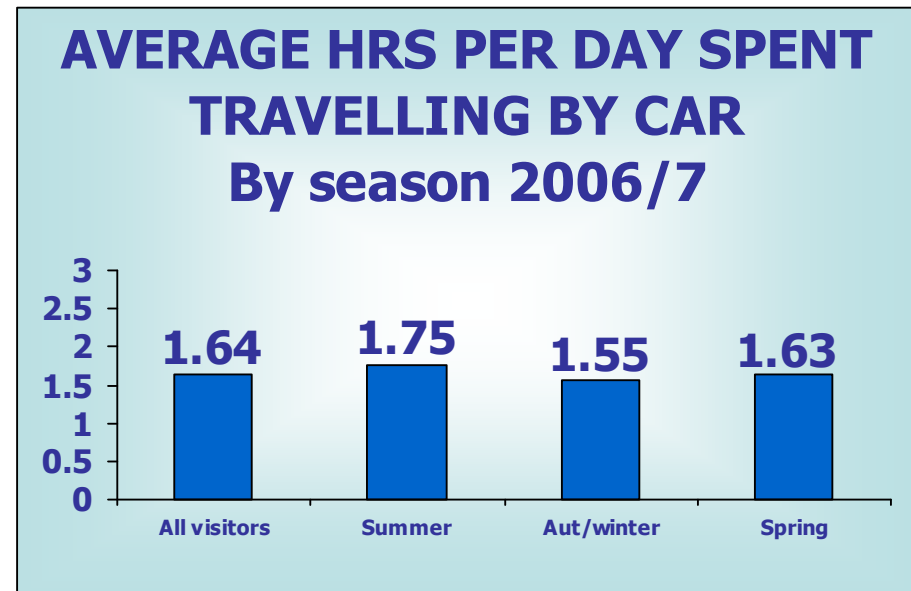
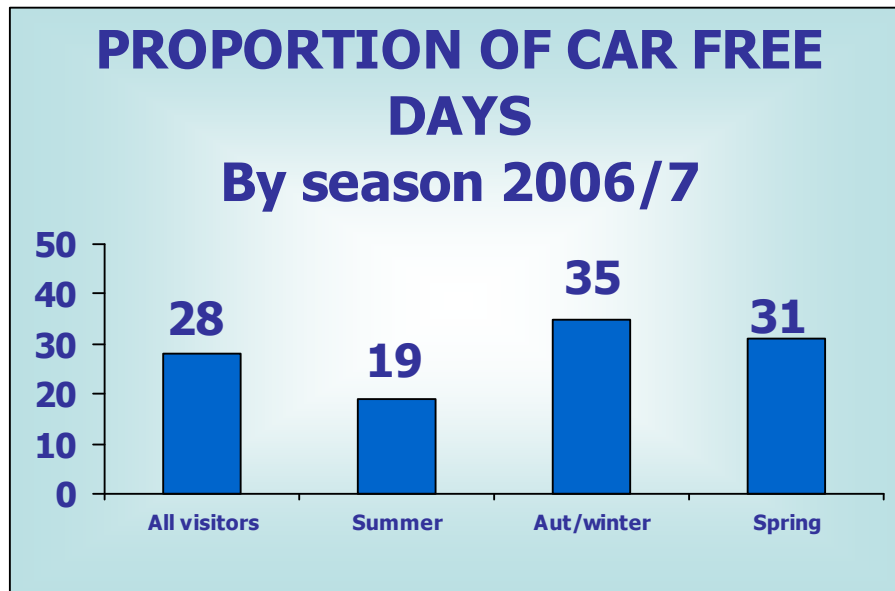
**“Approximately how many of these days would you estimate that you have NOT travelled by car?”**

**“On average, how many hours a day would you say you have spent travelling by car during this trip to Cornwall?”**

# Car free travel

At the time of interview, visitors had spent an average of 4.3 days in Cornwall. Of these, approximately 28% (1.2 days) had been car free.

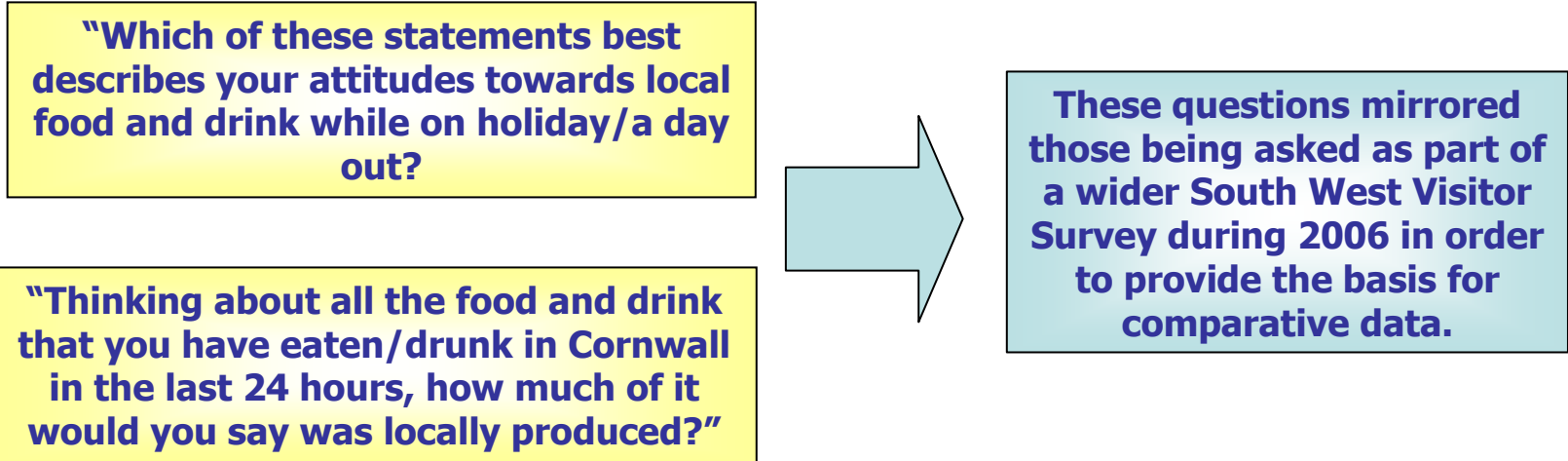
Visitors to the county during the autumn/winter period enjoyed the highest proportion of car free days at 35%, followed closely by those visiting during the spring (31%). Visitors to Cornwall during the summer months spent a significantly lower proportion of car free days in the county at 19%.



On average, visitors to Cornwall had spent an average of 1.64 hours (or about 1 hour 38 minutes) per day travelling by car (excluding their journey to the county). Once again, those visitors to the county during the autumn/winter spent the fewest hours travelling by car (1.55 or 1 hour 33 minutes), than those visiting during the main summer months (1.75 or 1 hour 45 minutes) or during the spring (1.63 or 1 hour 38 minutes).

# Purchasing local food & drink

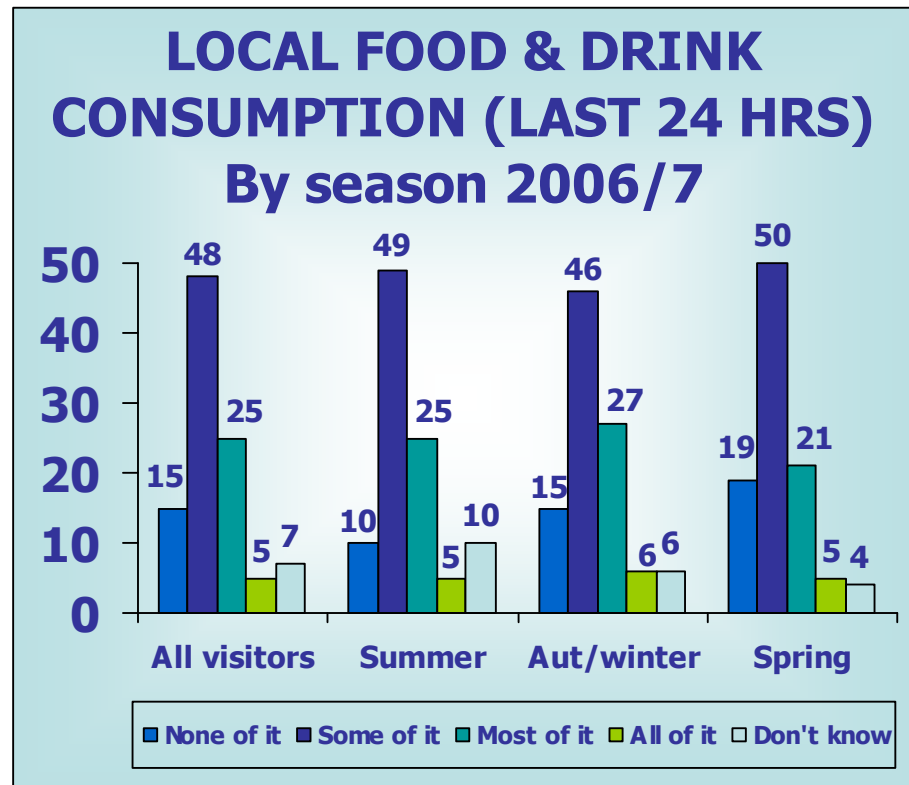
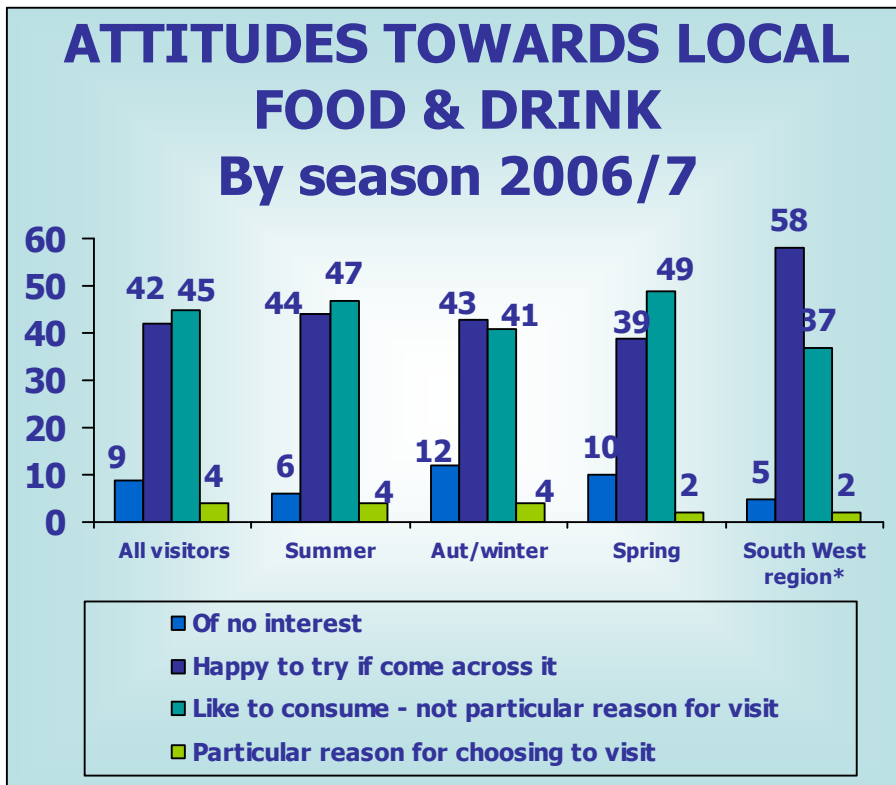
The 2006/7 survey also sought the level of visitors' interest in sourcing local food and drink whilst on their visit to Cornwall. Visitors were asked two questions (see below) to help to explore this area in more detail.



# Purchasing local food & drink

Visitors to Cornwall displayed a high degree of passive behaviour towards consuming local food and drink whilst on holiday i.e. they were happy to try it if they came across it.

Nonetheless, despite the very small proportion of visitors actively seeking out locally produced food and drink (4%), a significant proportion of visitors considered that some of the food they had consumed in the county in the last 24 hrs had been locally produced (48%). Indeed, a quarter of visitors indicated that most of the food and drink they had consumed in the last 24 hours had been locally produced. There was no significant difference in visitors' attitudes towards or consumption of locally produced food and drink according to the time of year of the visit.





# CHAPTER 5

## Information sourcing



South West  
England

# Summary

- A large proportion of visitors relied on previous visits they had made/knowledge they had of the county when obtaining information about holiday in Cornwall
- Around a quarter of visitors sourced information about holiday in Cornwall over the internet.
- Brochures/guides/leaflets remain a useful source of information for some visitors
- Around three fifths of visitors to Cornwall had used the internet to book their accommodation
- Recognition levels amongst visitors of the [www.visitcornwall.co.uk](http://www.visitcornwall.co.uk) website were good



# Introduction

This chapter examines the sources of information used by visitors when obtaining information about holidaying in Cornwall. It includes:

- Information sourcing
- Use of the internet
- Recognition of website

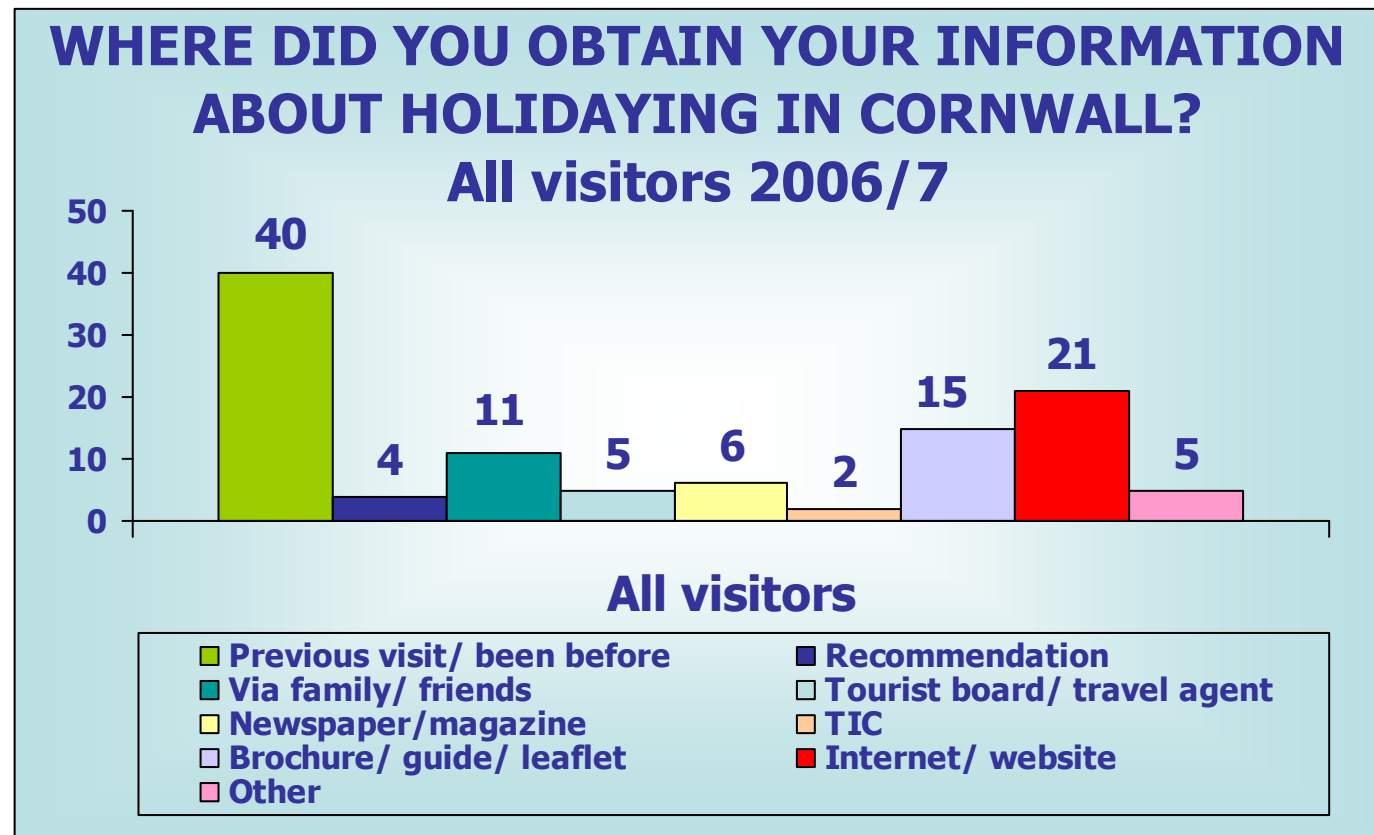


# Information sourcing

The internet remains the second most popular information source (other than a previous visit) for visitors to the county (21%).

Brochures/guides/ leaflets had been used by 15% of visitors and around 1 in 10 had relied on friends/family for their information. There was little variation according to the time of year of their visit.

A higher proportion of visitors on their main holiday of the year (27%) had used the internet compared with those visitors on an additional holiday to the county (18%).



For a full list of the 'other' information sources used by visitors see Appendix 2.

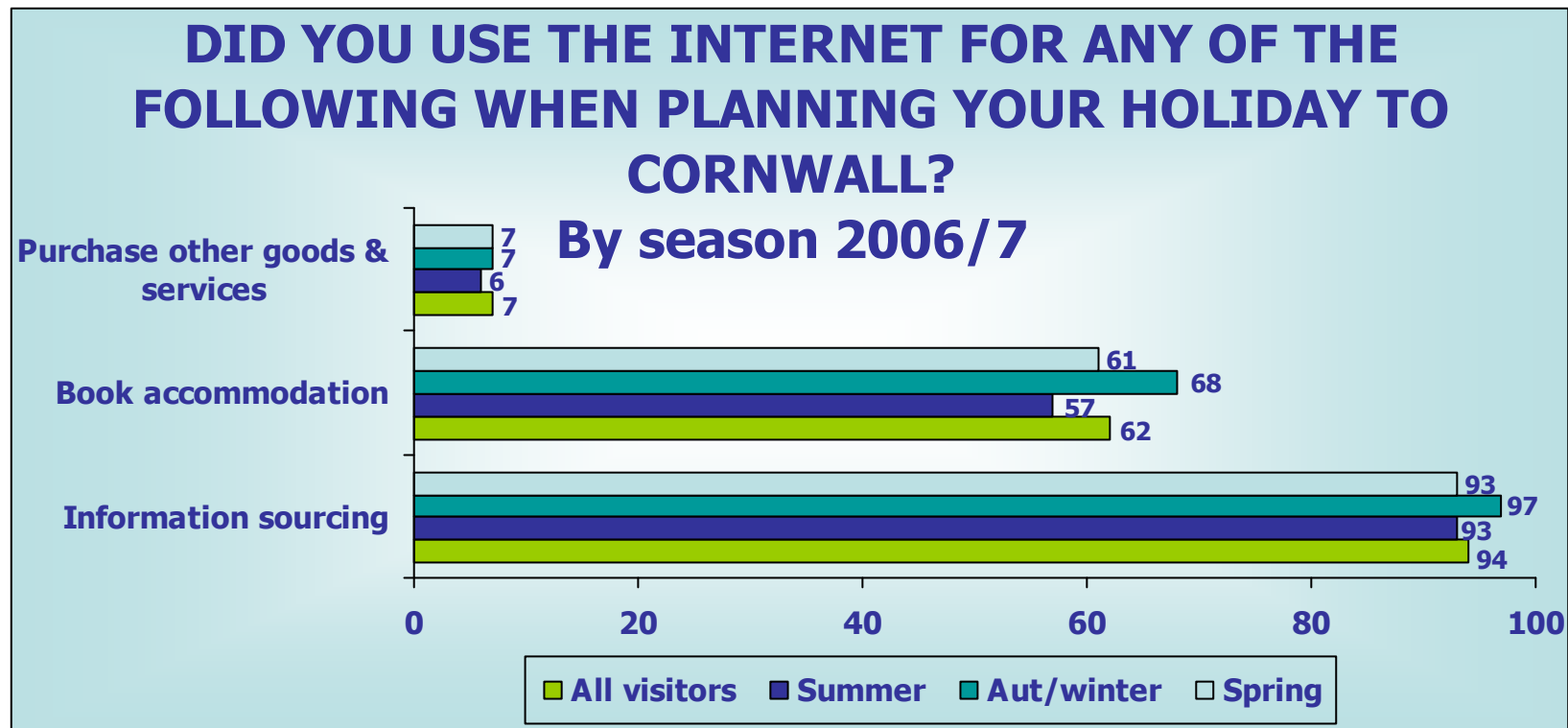
# Internet usage

Respondents who obtained their information about holidaying in Cornwall via the internet, were asked what they had used the internet for i.e. information sourcing, to book accommodation or for information sourcing and to purchase other goods & services e.g. flights, car hire etc.

**The majority of visitors who had used the internet had done so to source information (94%).**

Around three fifths (62%) of internet users had used the internet to book their accommodation.

7% had purchased other goods & services such as car hire, book flights, attraction tickets etc. over the internet. There was little variation according to the time of year of the trip.



# Visit Cornwall homepage

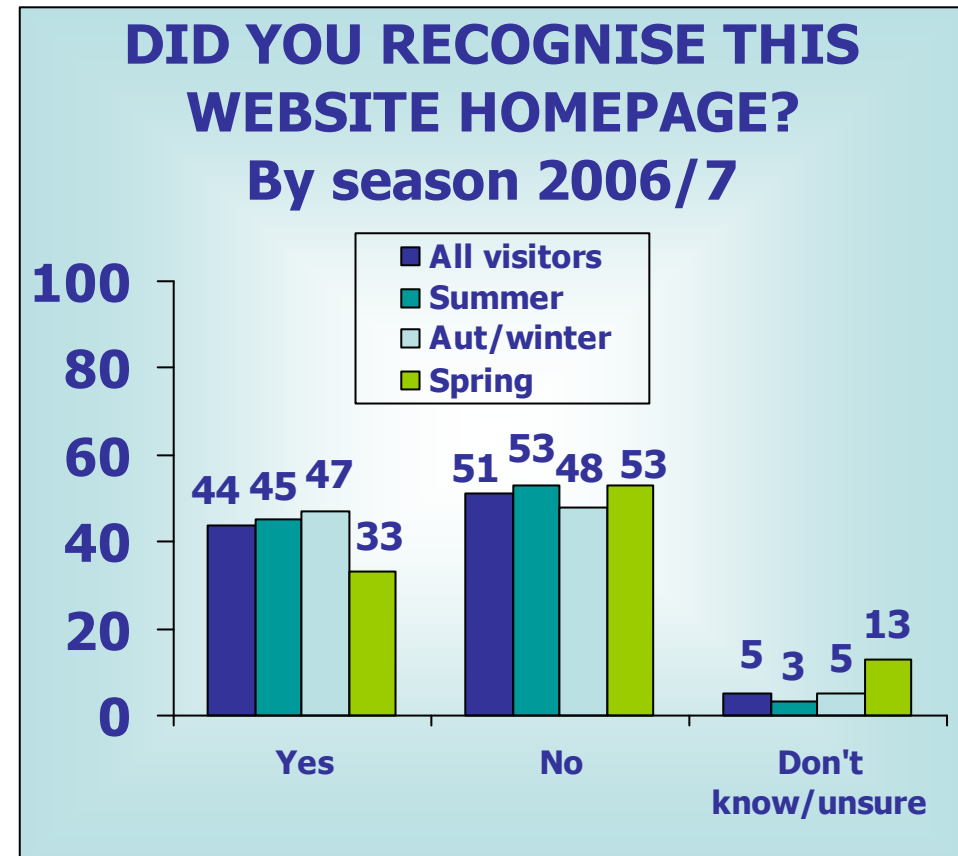
There was a good level of awareness amongst internet users of the Visit Cornwall website.

When shown a visual prompt, 44% of visitors who had used the internet to source information about Cornwall did recognise the Visit Cornwall website homepage (see prompt of website homepage below).

There was little variation in these visitors' levels of awareness of the website according to the time of year of their visit. However, 47% of visitors on an additional holiday to the county recognised the site.



Spontaneous awareness/recall of the Visit Cornwall website was not tested by the survey and may be lower. This would have implications for visitors referring other (potential) visitors to the website.



# CHAPTER 6

## Visitor Expenditure



South West  
England



# Summary

- **Average expenditure amongst visitors in Cornwall was high at around £40 per person per day/night**
- **Average spending was highest in terms of accommodation (£14.20), eating and drinking (£12.10) and shopping (£8.60) and lowest in terms of entertainment (£1.00) and travel and transport (£3.20)**
- **Visitors to the county during the autumn/winter had a higher average spend per person (£42.90) than those visiting during the spring (£34.30) and summer periods (£37.30)**

# Introduction

Visitors to Cornwall staying overnight in the county were asked a number of questions regarding their expenditure during their trip to Cornwall.

Firstly, they were asked to estimate how much they, and their immediate party, had or would be spending in total on their accommodation for the duration of their stay in the county inclusive of breakfast if included in the price of their accommodation.

Secondly, they were asked to think about their day as a whole (on the day that they were interviewed) and to estimate how much they, and their immediate party, had or would be spending that day and evening in Cornwall on the following:

1. Eating & drinking (e.g. in cafes, pubs, restaurants, hotels etc.
2. Shopping (including souvenirs, guidebooks, clothes, sweets, drinks, food & other purchases
3. Entertainment (including admissions to attractions, theatre, bowling, tours etc.
4. Travel & transport in Cornwall e.g. fuel, fares, car parking charges

**Visitors were also asked how many people the estimates of expenditure covered.**

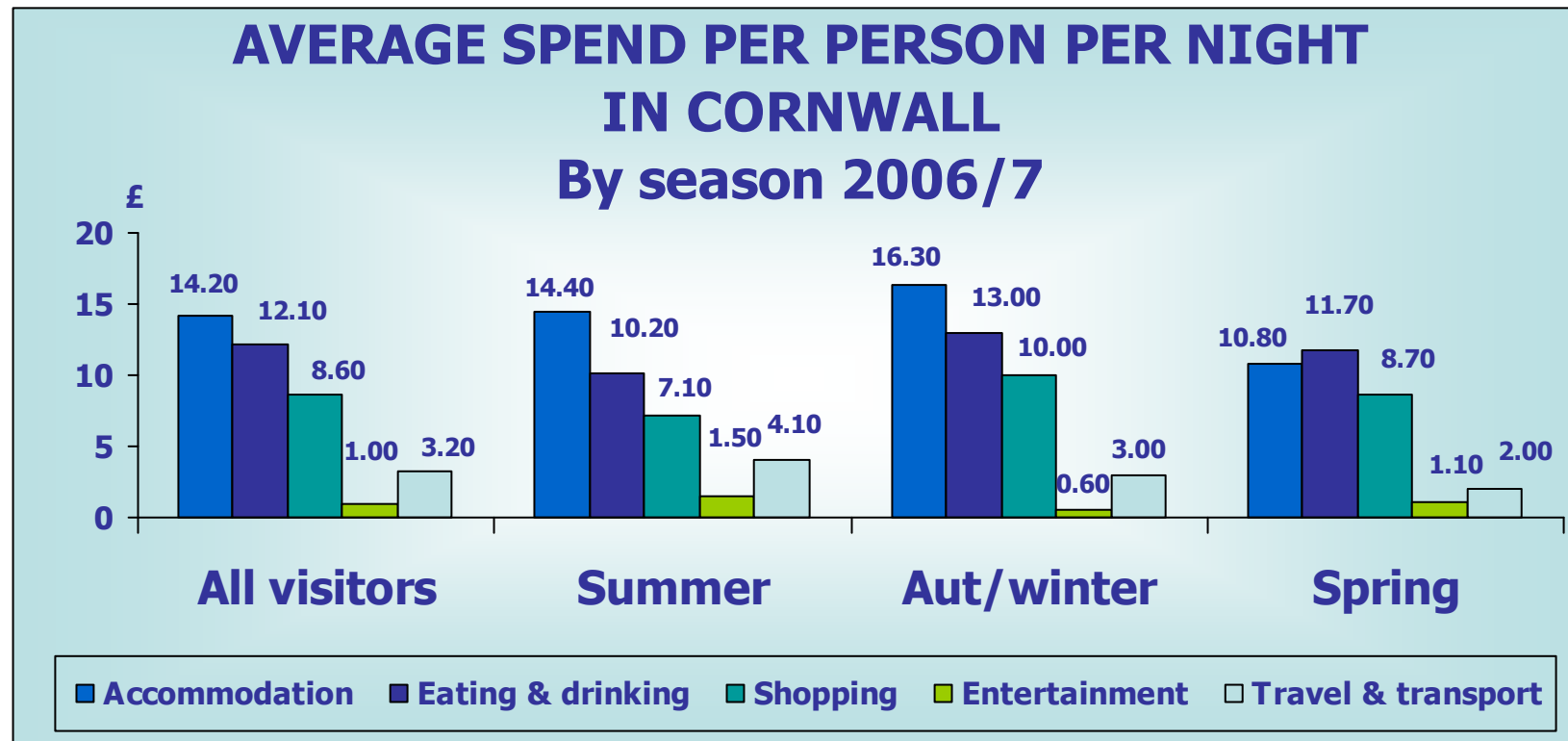
Using these two sets of data for total expenditure and number of people in the party, it was then possible to calculate an average spend per person per day for each category of spending and an average spend per person per night on accommodation. Please note that spending by day visitors from home and day visitors on holiday was excluded from the spending calculations.

# Visitor expenditure

At just under £40 per person per day/night (£39.10), average expenditure amongst staying visitors in Cornwall was high.

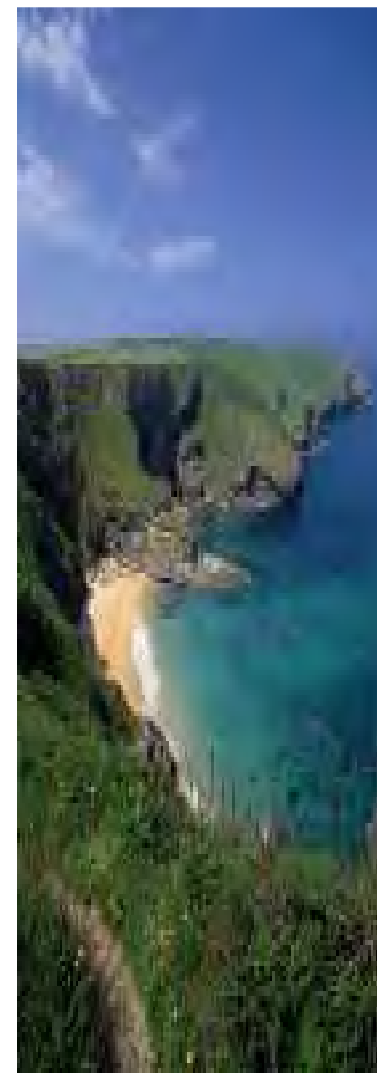
Unsurprisingly, spending was highest on accommodation, followed by eating and drinking and shopping and lowest in terms of entertainment and travel & transport.

Visitors to the county during the autumn/winter had a higher average spend per person (£42.90) than those visiting during the summer and spring periods (£37.30 and £34.30 respectively).



# CHAPTER 7

## Visitor's Views & Opinions



South West  
England

# Summary

- **On the whole, visitors appear very satisfied with their overall visitor experience whilst in Cornwall.**
- **With the exception of one or two indicators, all the aspects explored by the 2006/7 survey were considered 'good' or 'very good' by visitors regardless of the time of year of their visit.**
- **A high proportion of visitors rated each of the indicators as 'very good'.**
- **Visitors had the highest opinions of:**
  - **the general atmosphere (4.72)**
  - **feeling of welcome (4.67)**
  - **cleanliness of the beach (4.62)**
  - **cleanliness of the sea (4.60)**

# Summary

- Opinions were also particularly high in terms of:
  - quality of service at accommodation (4.55)
  - value for money of accommodation (4.50)
  - quality of the environment (4.48)
  - upkeep of parks and open spaces (4.47)
  - range of places to eat & drink (4.45)
  - range of attractions/places to visit (4.45)
  - feeling of safety from crime (4.35)
  - quality of service at places to eat & drink (4.30)
  - quality of service at attractions/places to visit (4.28)
  
- Visitors to the county during the spring and summer periods typically had higher opinions of each of the indicators explored by the 2006/7 survey than those visitors to Cornwall during the autumn/winter months.
  
- Visitors' opinions were lower in terms of:
  - cost of parking (3.13)
  - ease of parking (3.54)
  - wet weather provision (3.68)
  - feeling of safety from traffic (3.75)

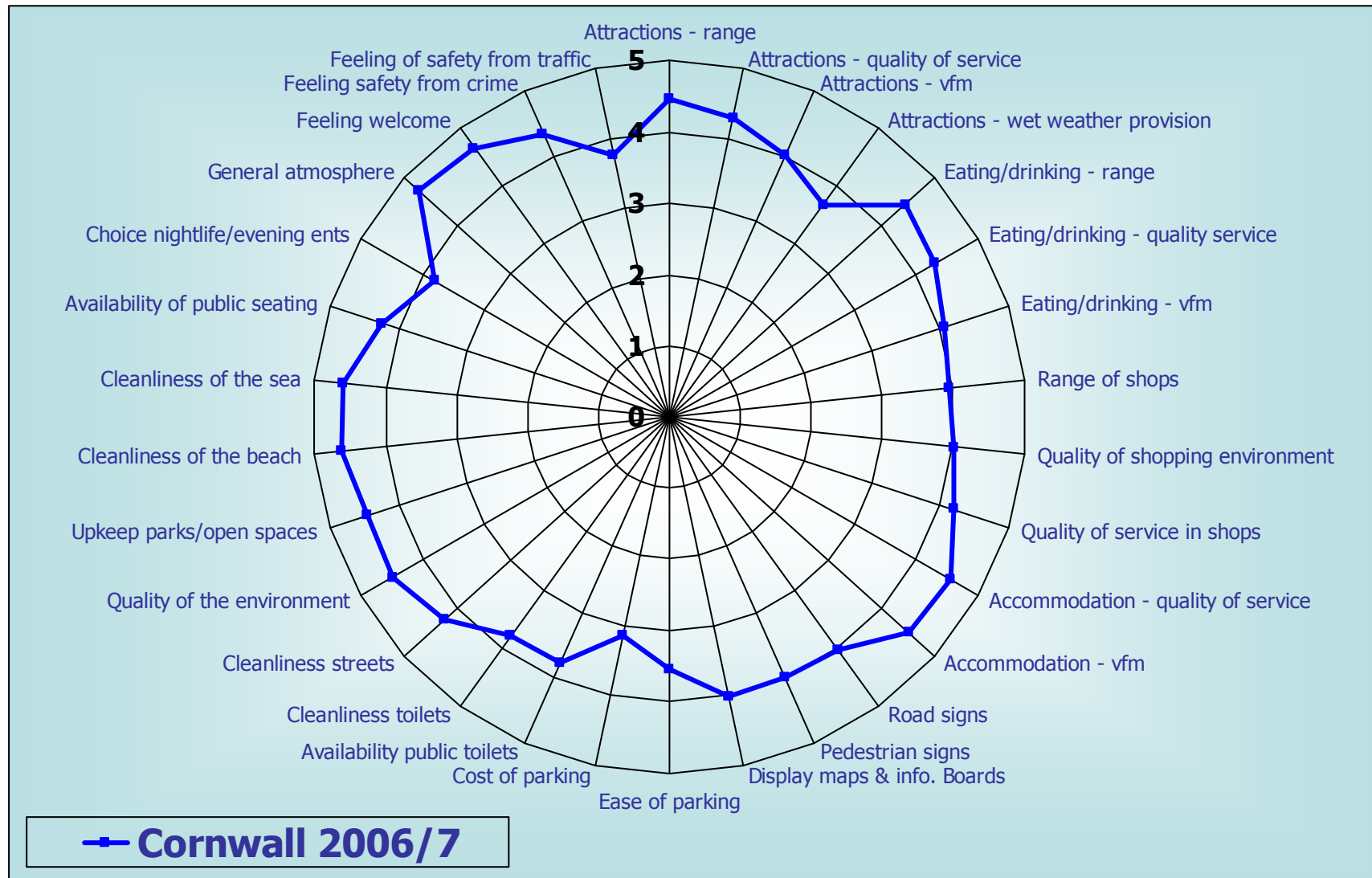
# Introduction

The 2006/7 visitor survey obtained visitors' opinions of a wide range of factors or indicators, which together comprise the 'visitor experience'. Each factor, or indicator, was rated on a range of one to five where '1' = 'very poor' (or the most negative response), '2' = 'poor', '3' = 'average', '4' = 'good' and '5' = 'very good' (or the most positive response), allowing an opinion 'score' (out of a maximum of five) to be calculated. Visitors were asked to rate the following aspects of their visitor experience:

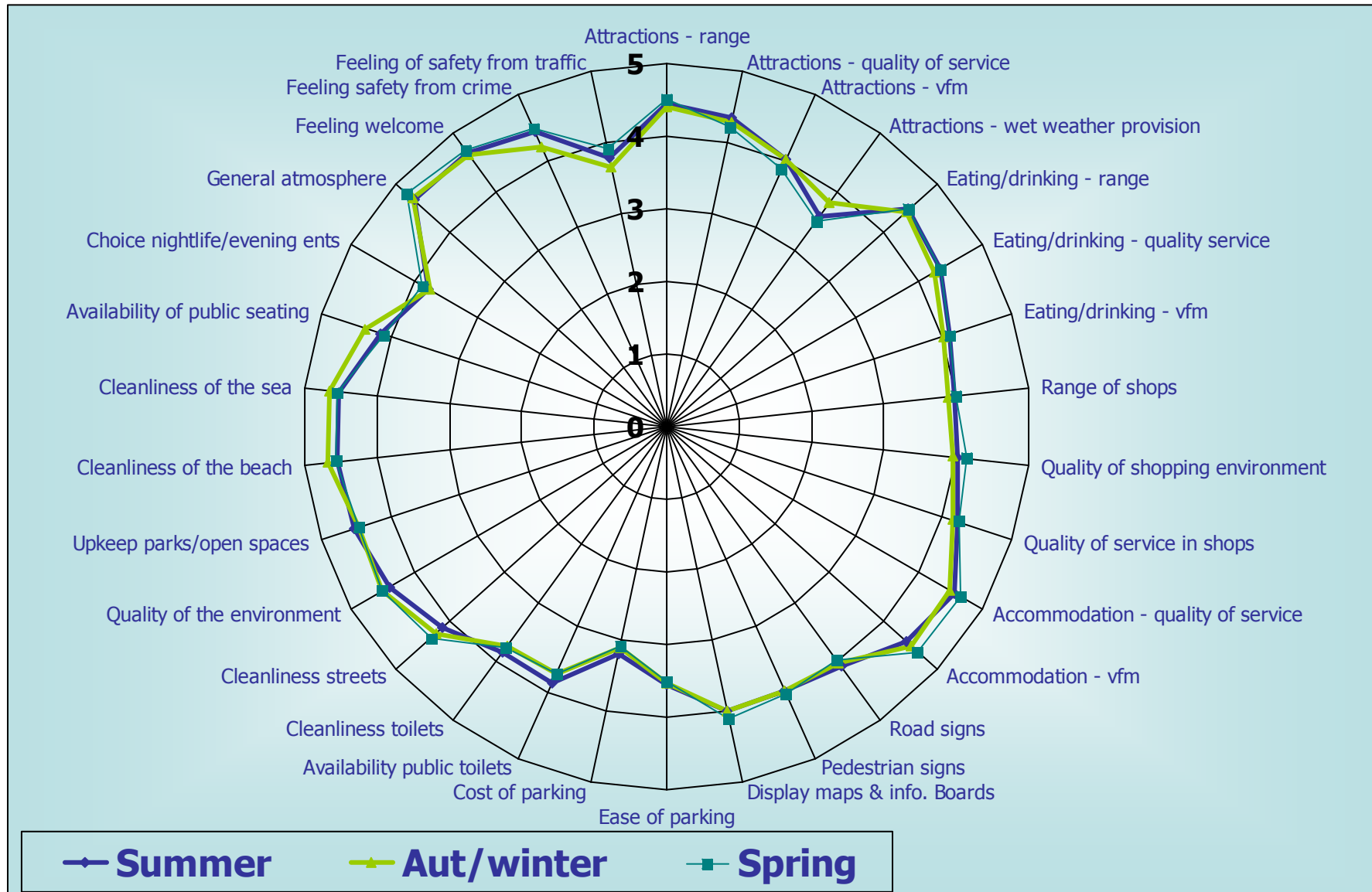
1. Visitor attractions & other places to visit
2. Places to eat & drink
3. Shops
4. Accommodation
5. Ease of finding way around
6. Car parking
7. Public toilets
8. Cleanliness of the streets
9. Quality of the environment
10. Upkeep of parks & open spaces
11. Availability of public seating
12. Choice of nightlife/evening entertainment
13. Overall impression of Cornwall
14. Feeling of safety from crime & traffic



# All visitor opinions of Cornwall 2006/2007



# Opinions of Cornwall by season 2006/7



# Visitor attractions & places to visit

Visitors' opinions of the attractions and places to visit in Cornwall were good to very good.

Range of attractions/places to visit and quality of service received the highest average scores of all four indicators at 4.45 and 4.28 respectively. Wet weather provision received a lower average score of 3.68.

81% of respondents rated the range of attractions and places to visit in Cornwall as 'good' or 'very good'.

On the whole, with the exception of their opinions of the range of attractions/places to visit in Cornwall, spring visitors had slightly lower opinions of each of the aspects of the attractions/places to visit in the county than those visiting the county in the summer and autumn/winter months.

<b>Range:</b>
Summer: 4.45
Autumn/winter: 4.45
Spring: 4.52

<b>Quality of service:</b>
Summer: 4.34
Autumn/winter: 4.27
Spring: 4.21

<b>Value for money:</b>
Summer: 4.02
Autumn/winter: 4.03
Spring: 3.89

<b>Wet weather provision</b>
Summer: 3.58
Aut/winter: 3.81
Spring: 3.52



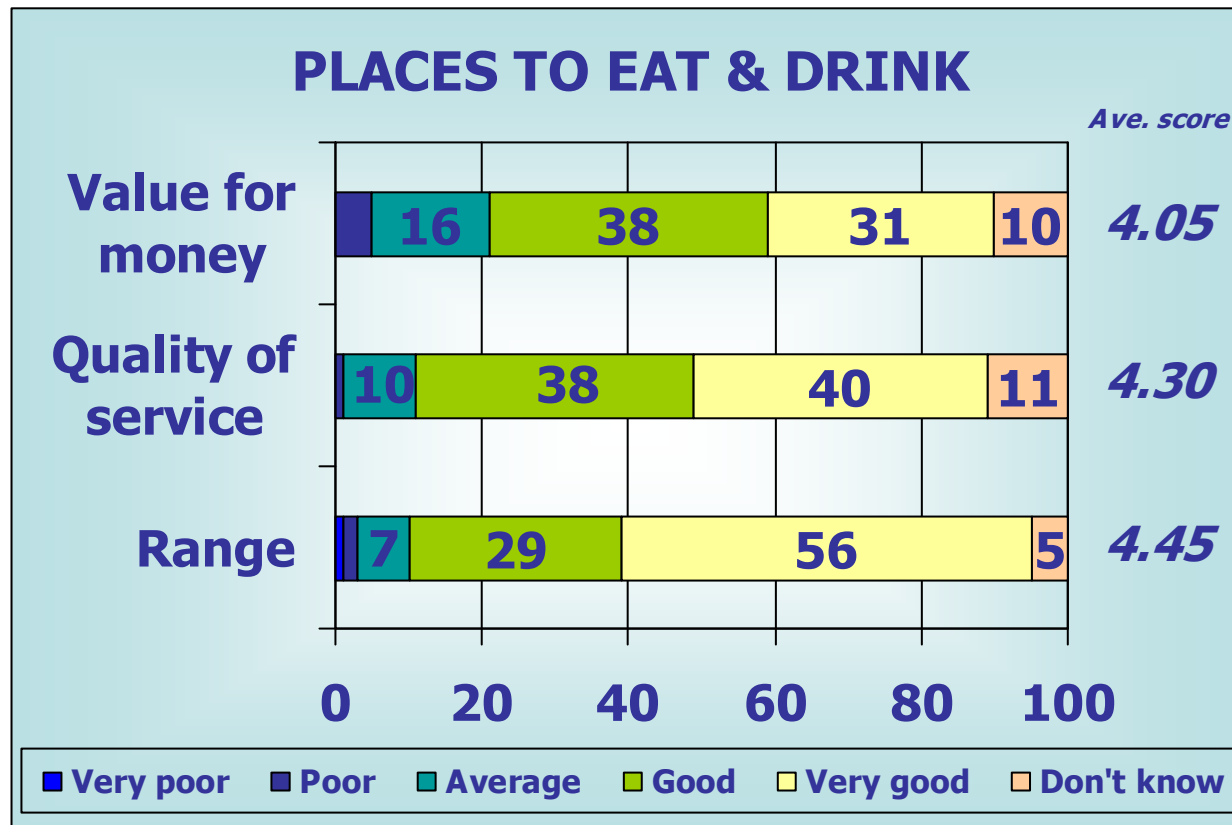
# Places to eat & drink

Visitors' opinions of the places to eat and drink in Cornwall were very good.

Visitors had the highest opinion of the range of places to eat and drink in the county with an average score of 4.45 out of 5.00.

60% or more of respondents rated each of the aspects of the places to eat and drink in the county as 'good' or 'very good'.

Spring and summer visitors had slightly higher opinions of each of the aspects of the places to eat and drink than those visitors to the county in the autumn/winter months.



Range	
Summer:	4.46
Aut/winter:	4.43
Spring:	4.47

Quality of service	
Summer:	4.33
Aut/winter:	4.25
Spring:	4.33

Value for money	
Summer:	4.08
Aut/winter:	4.01
Spring:	4.09

# Shopping

**Visitors' opinions of shopping in Cornwall were good.**

Visitors had the highest opinion of the quality of service in the shops with an average score of 4.18 out of 5.00.

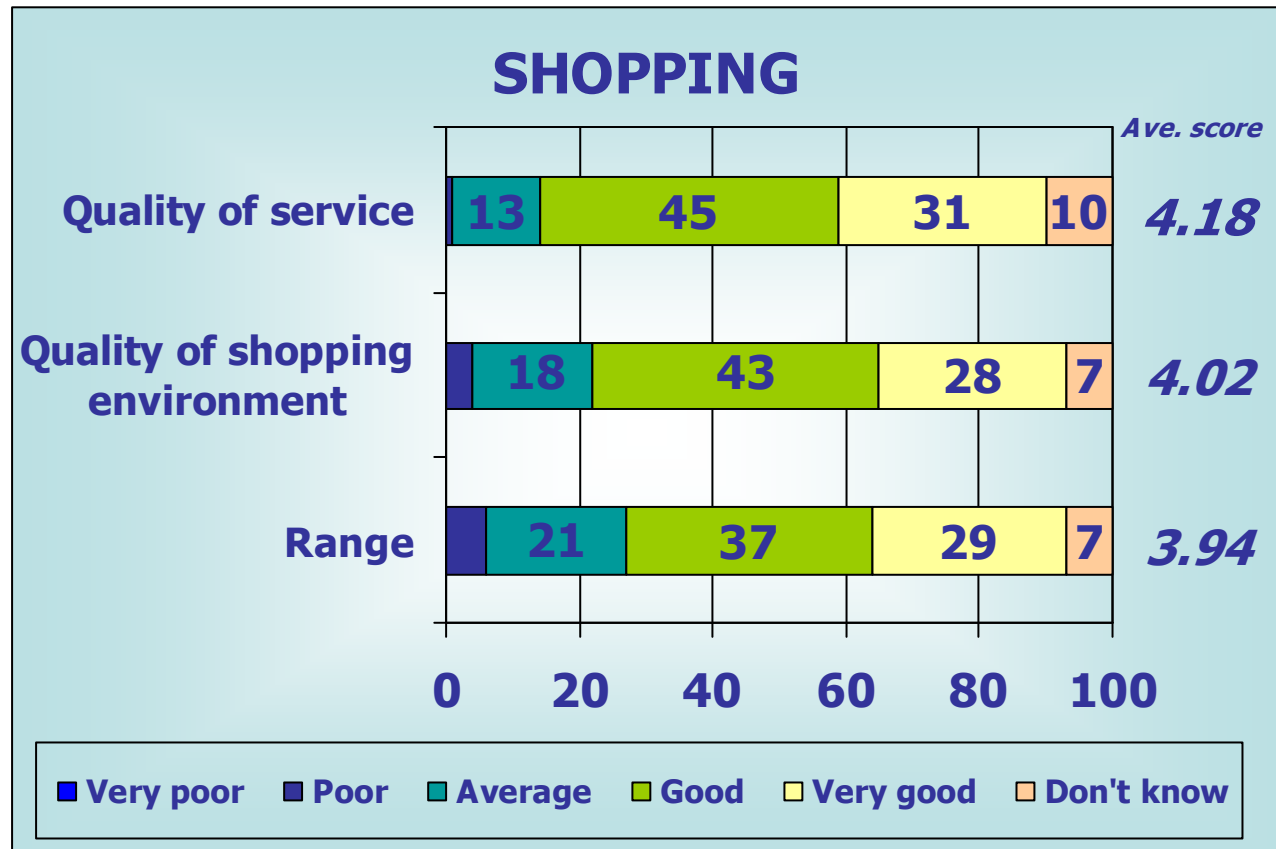
Two thirds or more of respondents rated each of the aspects of shopping in the county as 'good' or 'very good'.

Spring visitors had slightly higher opinions of each of the aspects of the shops than autumn/winter and summer visitors.

Range
Summer: 3.97
Aut/winter: 3.90
Spring: 3.99

Quality of shopping environment
Summer: 4.03
Aut/winter: 3.96
Spring: 4.14

Quality of service
Summer: 4.22
Aut/winter: 4.12
Spring: 4.23



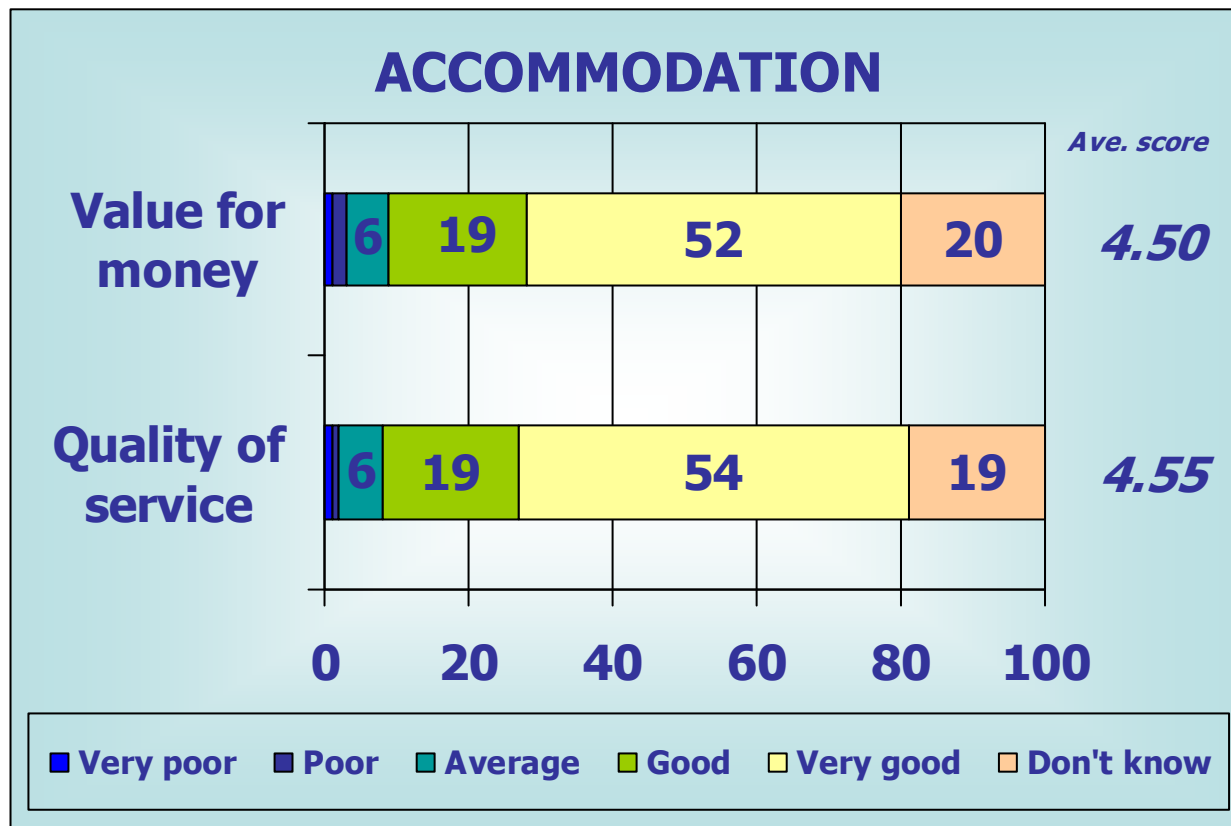
# Accommodation

Visitors' opinions of their accommodation in Cornwall were very good.

Quality of service and value for money of accommodation received average scores of 4.55 and 4.50 respectively.

70% or more of respondents rated each of the aspects of accommodation in the county as 'very good'.

Spring visitors had the highest opinions of their accommodation in Cornwall.



**Quality of service**  
 Summer: 4.57  
 Aut/winter: 4.49  
 Spring: 4.66

**Value for money**  
 Summer: 4.43  
 Aut/winter: 4.50  
 Spring: 4.63

# Ease of finding way around

Visitors' opinions of the ease of finding their way around Cornwall were very good.

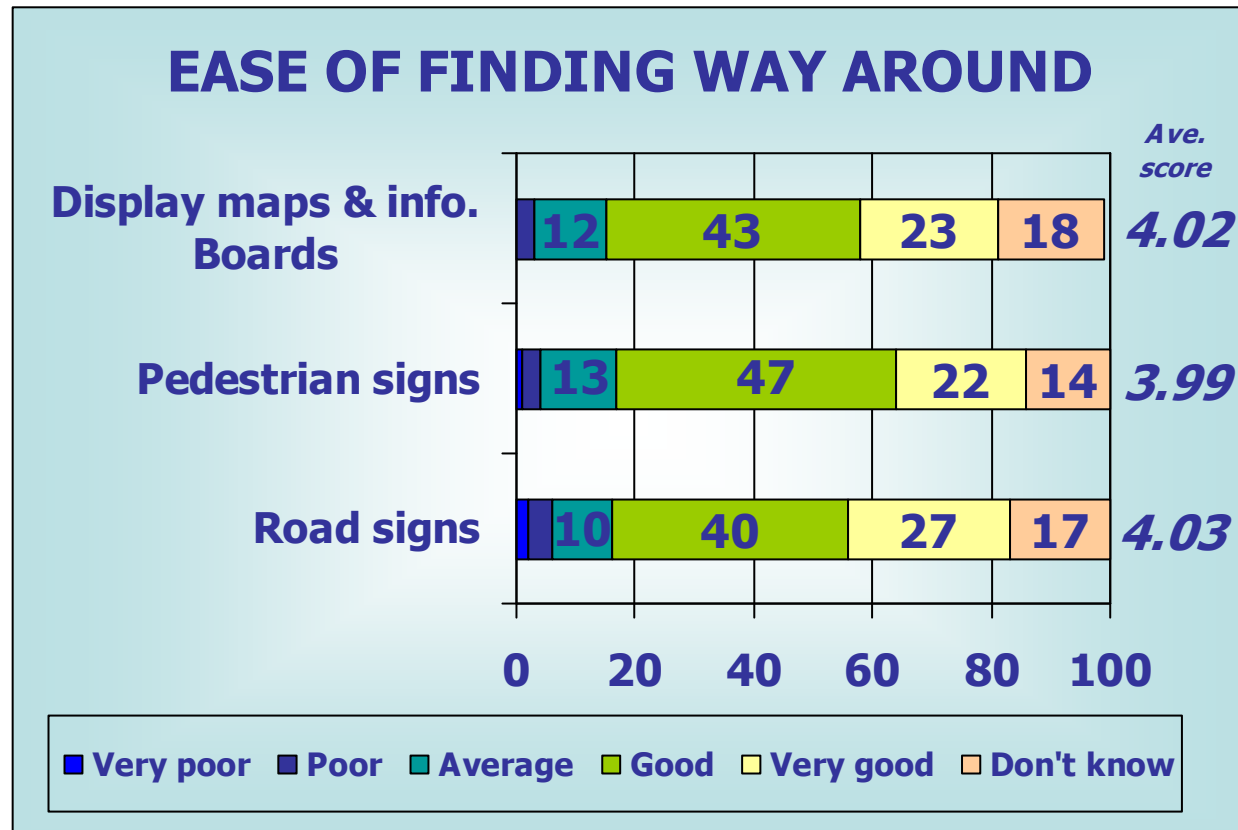
Two thirds or more of respondents rated each of the aspects of signage and display maps/boards in the county as 'good' or 'very good'.

Once again, opinions of each of the indicators were slightly higher amongst spring and summer visitors.

Road signs
Summer: 4.09
Aut/winter: 4.03
Spring: 3.98

Pedestrian signs
Summer: 3.97
Aut/winter: 3.98
Spring: 4.03

Display maps & info. boards
Summer: 4.01
Aut/winter: 3.99
Spring: 4.10





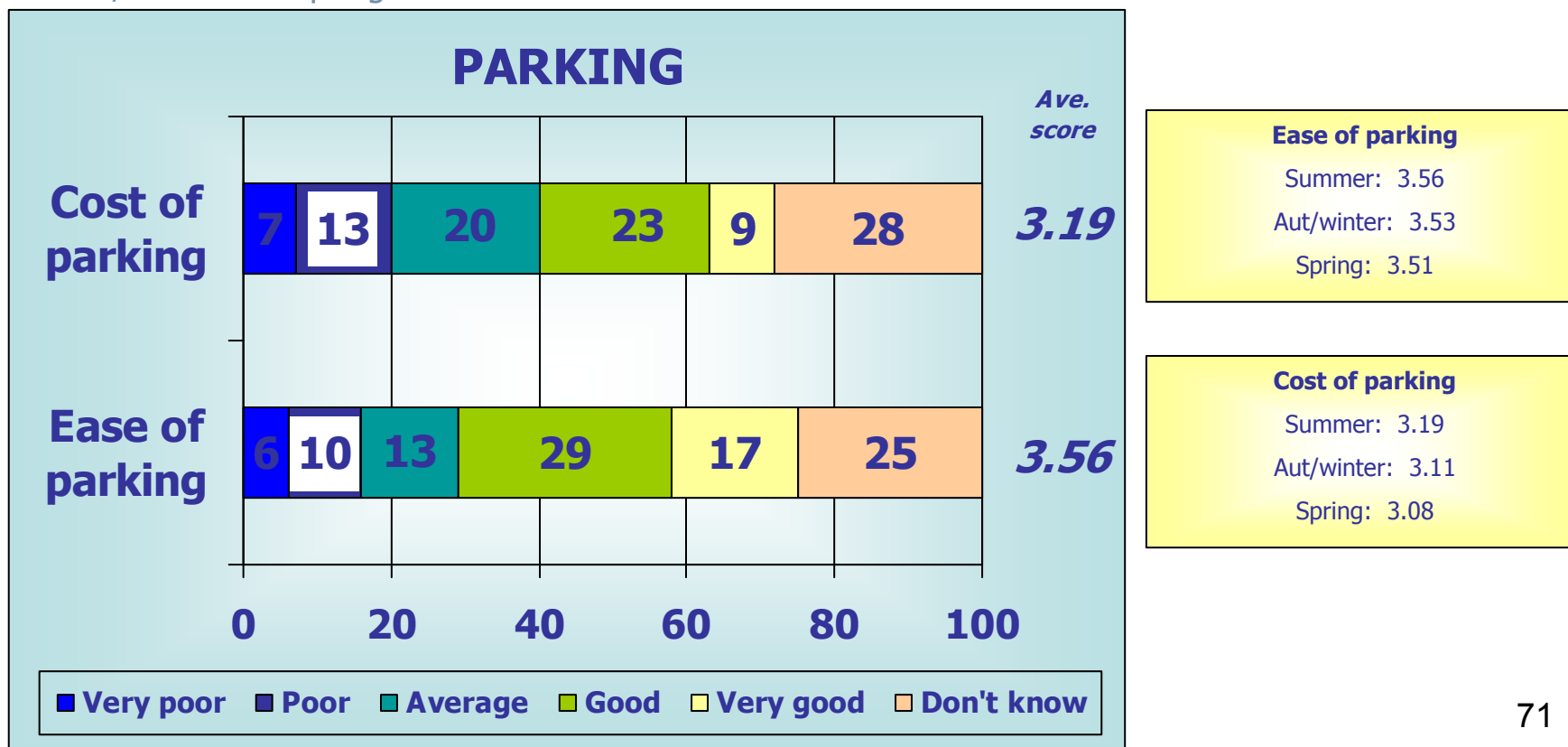
# Parking

Visitors' opinions of parking in Cornwall were average.

Visitors gave the ease of parking in the county (3.56) and the cost of parking (3.19) in Cornwall the lowest average scores of all the indicators explored by the 2006/7 survey.

16% of respondents rated the ease of parking in the county as 'poor' or 'very poor' whilst 20% did so for cost of parking. Around a third or more of visitors however, did rate each of the aspects of parking in Cornwall as 'good' or 'very good'.

Summer visitors had slightly higher opinions of parking in the county than those visitors during the autumn/winter and spring months.



# Public toilets

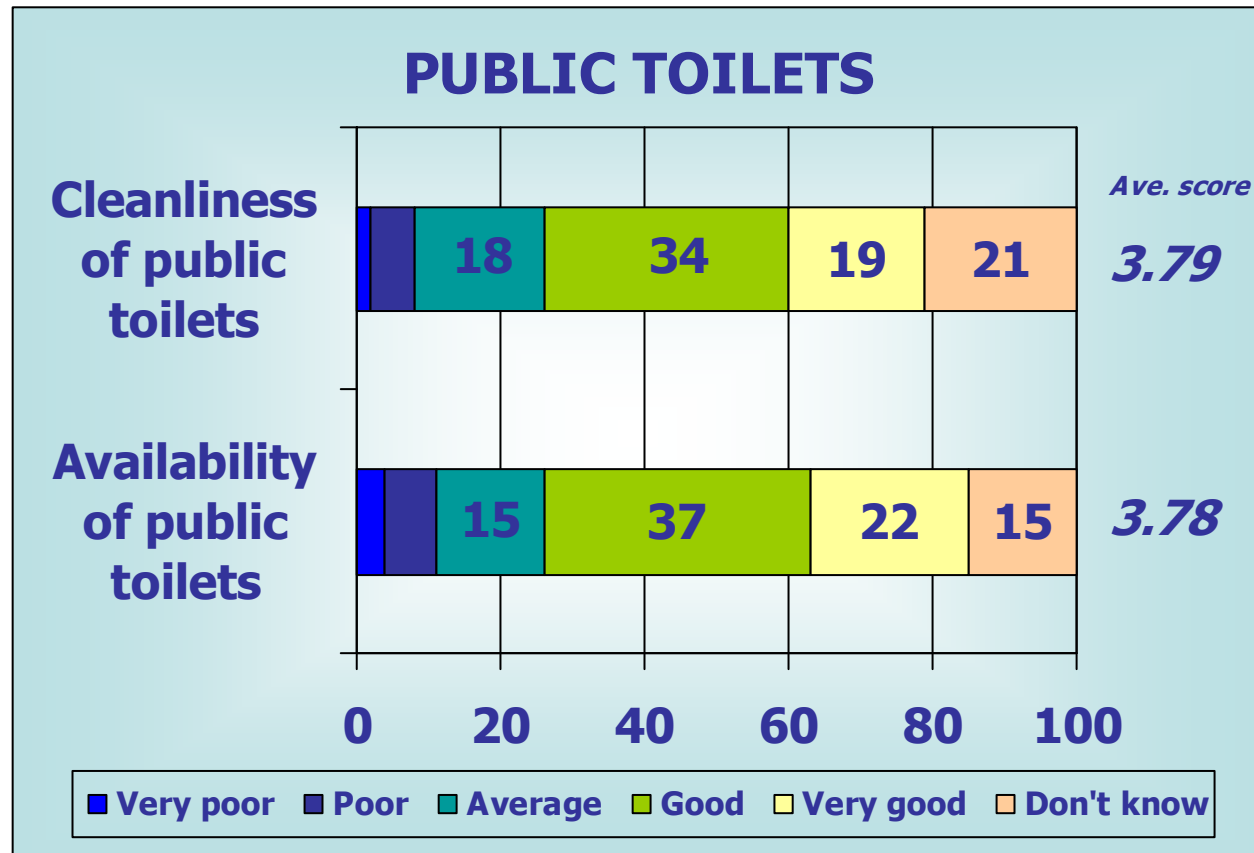
Visitors' opinions of the public toilets in Cornwall were average to good.

50% or more of respondents rated each of the aspects of the public toilets in the county as 'good' or 'very good'.

Opinions were highest amongst summer visitors.

**Availability**  
Summer: 3.87  
Aut/winter: 3.72  
Spring: 3.73

**Cleanliness**  
Summer: 3.86  
Aut/winter: 3.75  
Spring: 3.76



# Streets, the environment and parks/open spaces

Visitors' opinions of the cleanliness of the streets, the quality of the environment and upkeep of the parks/open spaces in Cornwall were very good.

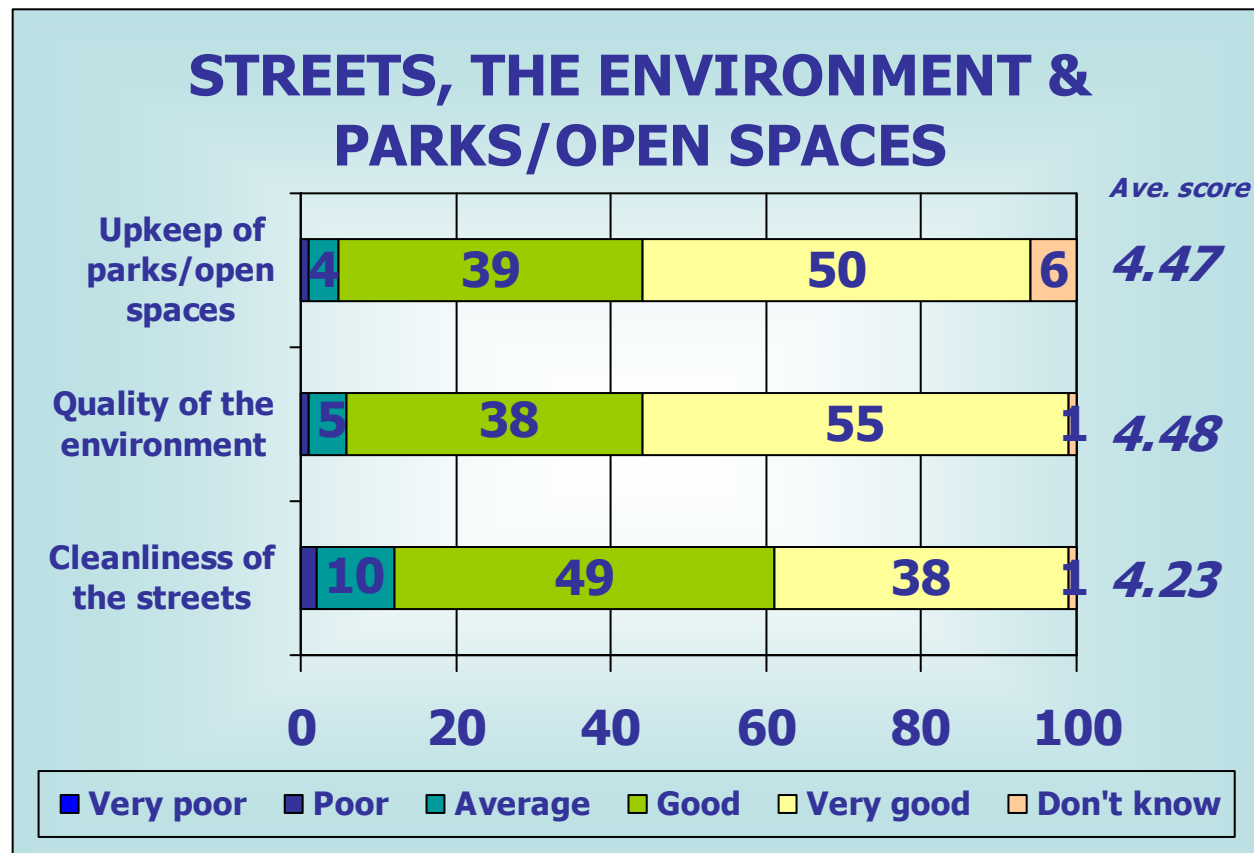
80% or more of respondents rated each of these aspects as 'good' or 'very good'.

Opinions were highest amongst autumn/winter and spring visitors.

**Cleanliness of the streets**  
 Summer: 4.14  
 Aut/winter: 4.25  
 Spring: 4.34

**Quality of the environment**  
 Summer: 4.41  
 Aut/winter: 4.52  
 Spring: 4.52

**Upkeep of parks/open spaces**  
 Summer: 4.50  
 Aut/winter: 4.45  
 Spring: 4.45

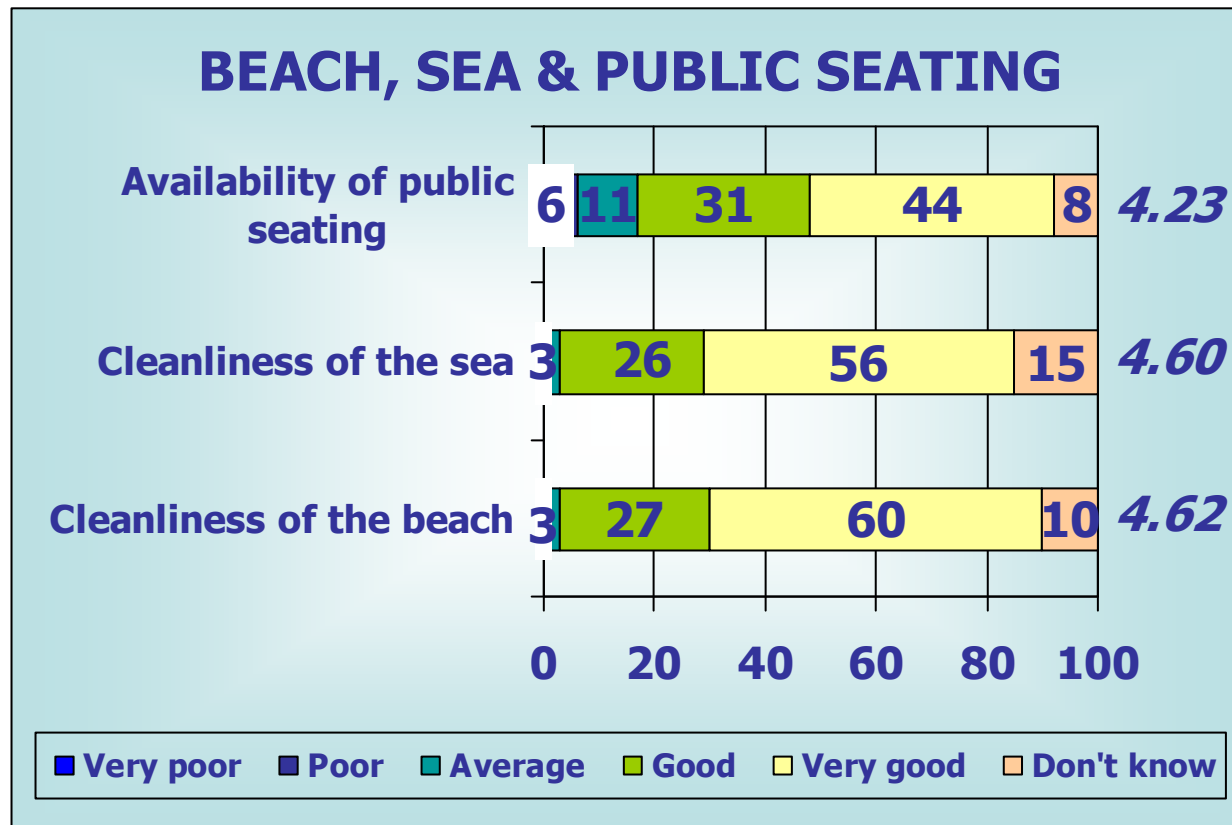


# Beach, sea and public seating

Visitors' opinions of the cleanliness of the beach and sea and availability of public seating in the county were very good.

The cleanliness of the beach and sea received two of the highest average scores of all the indicators explored by the 2006/7 survey (4.62 and 4.60 respectively) with 50% or more of respondents rating these aspects as 'very good'.

In contrast to many of the other indicators, autumn/winter visitors had slightly higher opinions of the beach, sea and seating in the county than those visiting during the summer and spring periods.



**Cleanliness of the beach**  
 Summer: 4.56  
 Aut/winter: 4.69  
 Spring: 4.58

**Cleanliness of the sea**  
 Summer: 4.54  
 Aut/winter: 4.67  
 Spring: 4.56

**Availability of public seating**  
 Summer: 4.15  
 Aut/winter: 4.36  
 Spring: 4.09

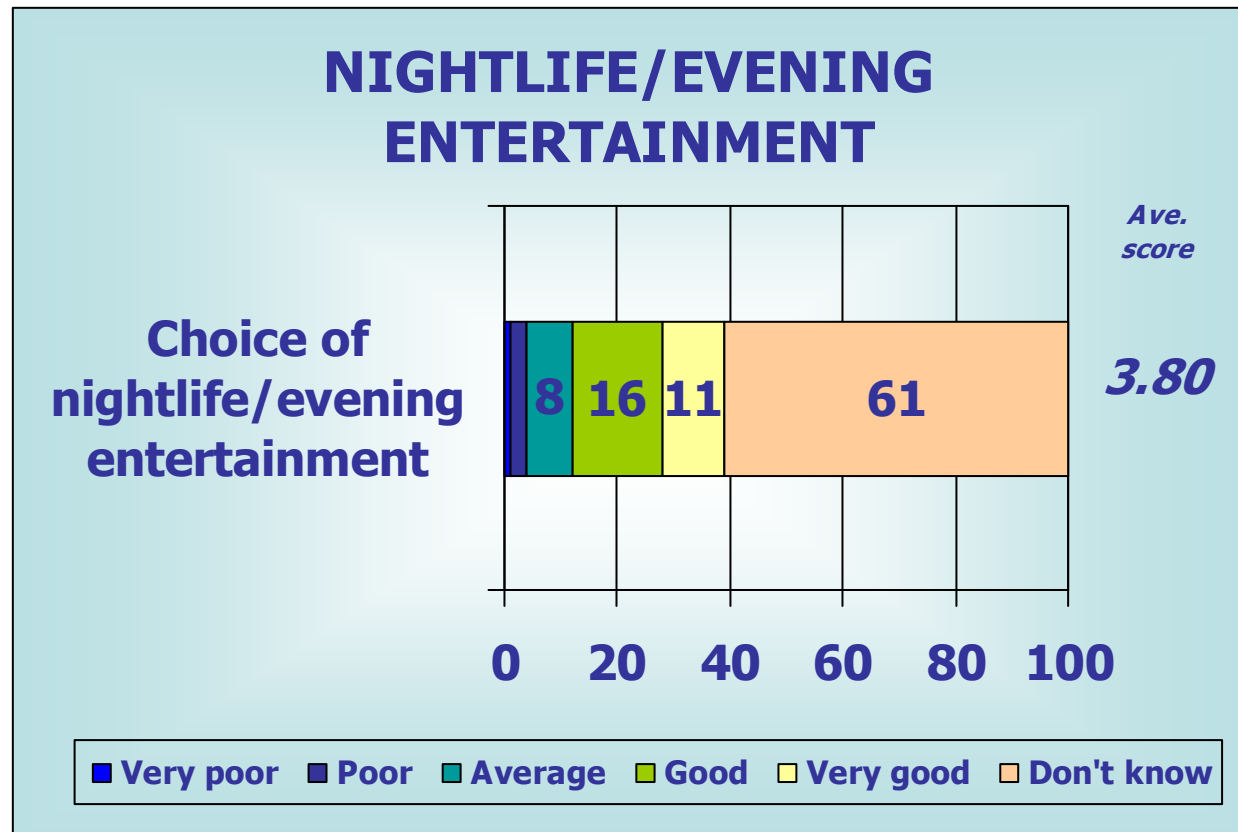
# Nightlife/evening entertainment

Visitors' opinions of the choice of nightlife/evening entertainment in Cornwall were good.

Around three fifths of respondents were unable to provide their opinion of the nightlife/evening entertainment in the county, whilst 27% rated this aspect of their visit as 'good' or 'very good'.

Opinions of this indicator were highest amongst autumn/winter visitors.

**Nightlife/evening entertainment**  
Summer: 3.77  
Aut/winter: 3.88  
Spring: 3.80

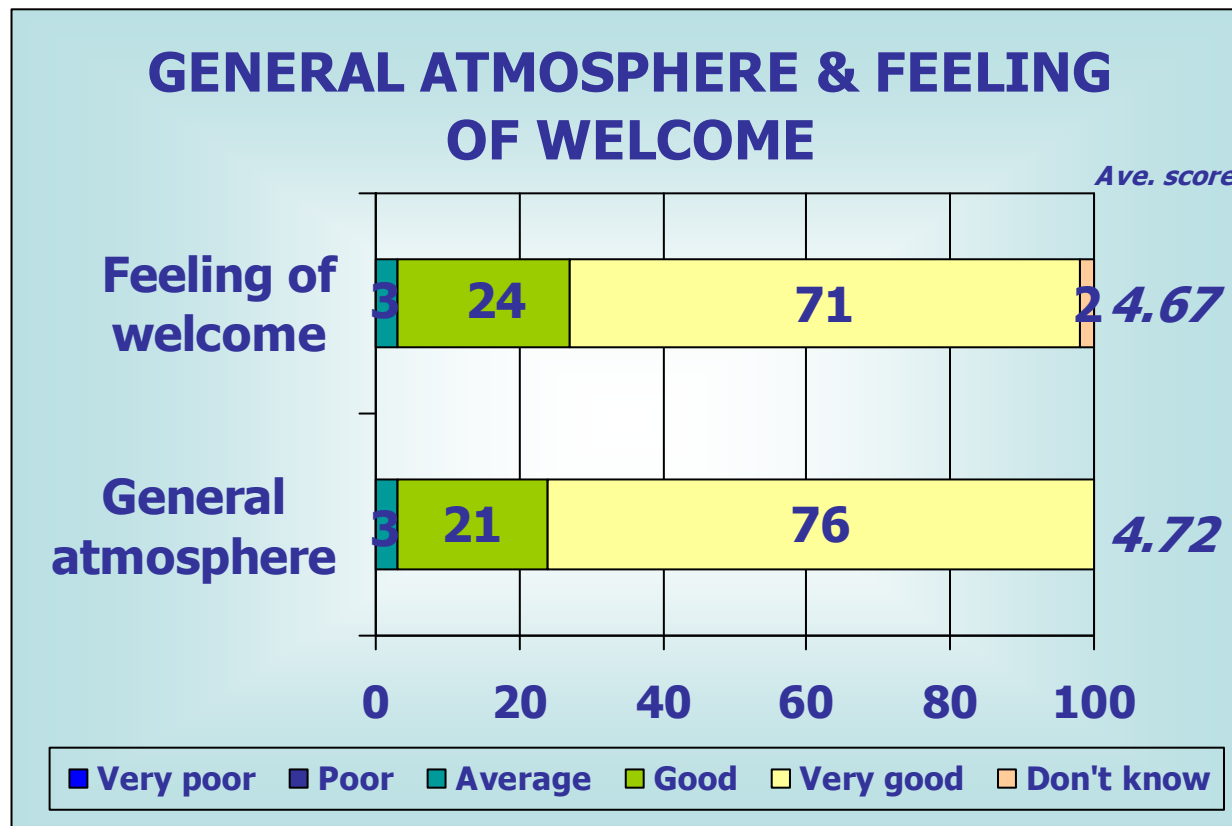


# Atmosphere and welcome

Visitors' opinions of the general atmosphere and feeling of welcome in the county were very good and received the highest average scores of all the indicators explored by the 2006/7 survey at 4.67 and 4.72 out of 5.00 respectively.

70% or more of respondents rated each of these indicators as 'very good'.

Spring visitors had a slightly higher opinion of each of these indicators than those visitors during the summer and autumn/winter months.



**General atmosphere**  
 Summer: 4.68  
 Aut/winter: 4.71  
 Spring: 4.81

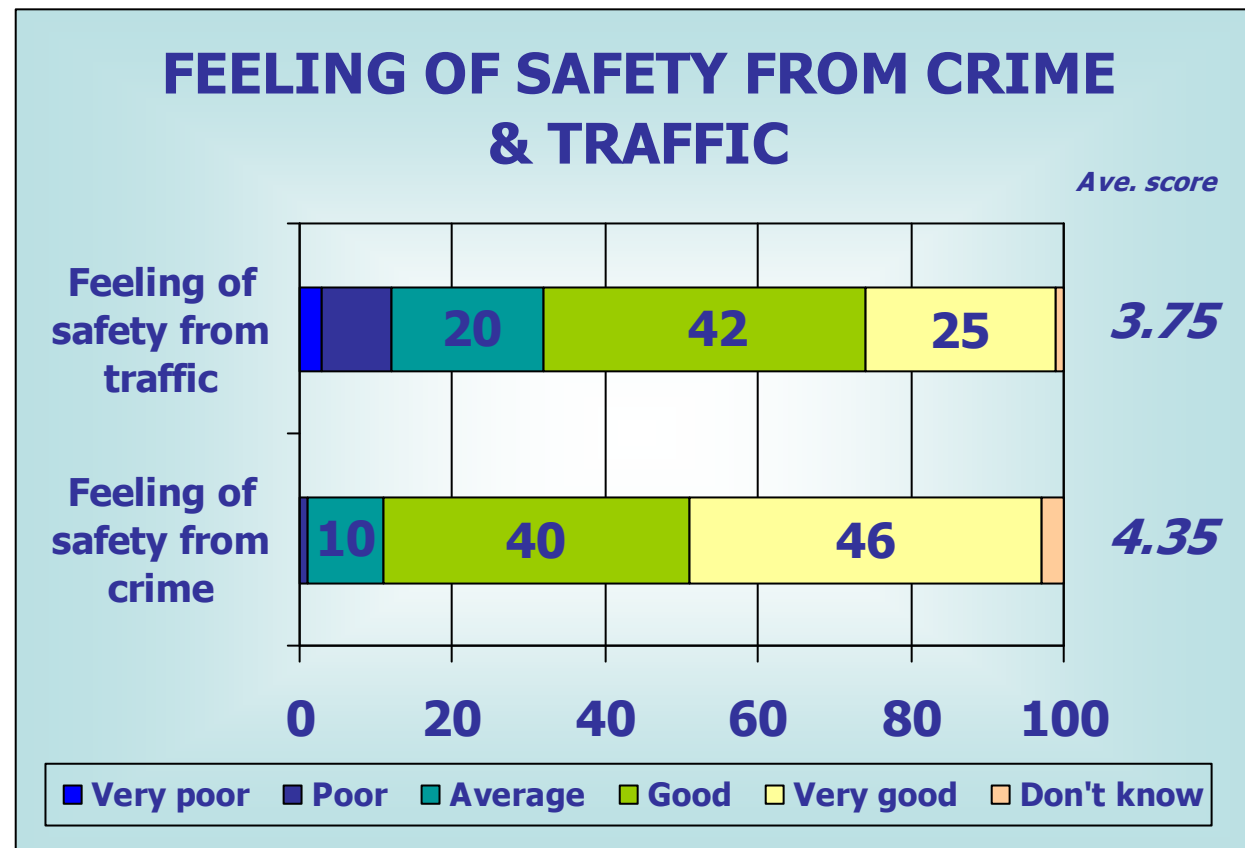
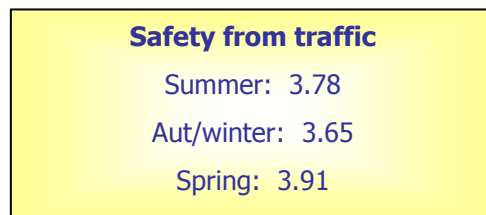
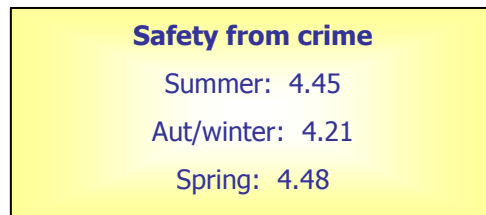
**Feeling of welcome**  
 Summer: 4.66  
 Aut/winter: 4.64  
 Spring: 4.71

# Safety from crime and traffic

Visitors' opinions of their feeling of safety from crime and traffic in Cornwall were good.

60% or more of respondents rated each of these aspects of their visit as 'good' or 'very good'.

Opinions of these indicators were highest amongst spring visitors.



# CHAPTER 8

## Destinations visited and other activities undertaken



South West  
England



# Summary

- **Visitors to Cornwall appear to be keen sightseers visiting a number of different towns in the county, visitor attractions and places of interest. They also participate in a wide range of different activities and outdoor active pursuits during their trip to Cornwall**
- **St Ives and Newquay were the most popular towns which visitors had or were intending to visit during their trip to Cornwall.**
- **The Eden Project, Land's End and National Trust/English Heritage properties were the most likely attractions/places of interest to be included in their visit to Cornwall by the largest proportions of visitors.**
- **Going for a short walk, shopping and spending time on the beach were the activities visitors to Cornwall were most likely to participate in during their visit to the county.**
- **Around half of all visitors who were planning to spend half a day or more on the beach indicated that this was the main reason for their visit to Cornwall. Unsurprisingly, this proportion increased during the summer period.**

# Introduction

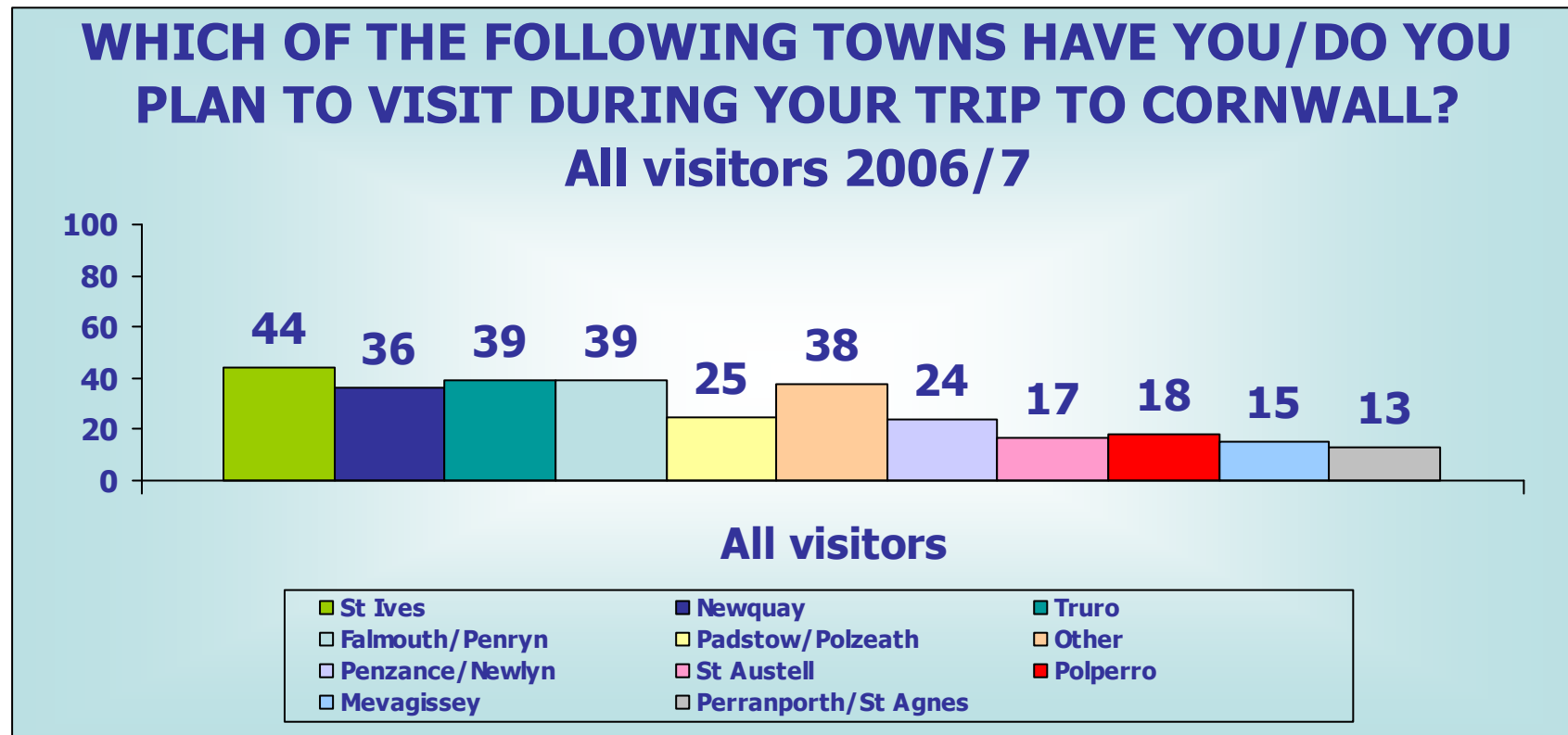
This chapter explores visits made to the towns and attractions/places of interest by visitors during their trip to the county, as well as activities that visitors had or would be participating in during their stay/trip. This chapter details the findings for:

- Town visits
- Attractions/places of interest visited
- Activities undertaken during the trip



# Town visits

St Ives, Falmouth and Truro were the most popular towns which visitors had/or were intending to visit during their visit to Cornwall. Please note however, that the towns visited were heavily influenced by the location where the interview took place and the geographical proximity of the locations in relation to each other..



There was little variation in the towns visitors had or were intending to visit according to the time of year. For a full list of the 'other' towns listed by visitors see Appendix 2.

# Attractions/places of interest visited

The Eden Project, Land's End and National Trust/English Heritage properties were the most popular attractions visitors had/were intending to visit during their trip to Cornwall.

39% of visitors had/were planning to visit The Eden Project, 28% Land's End and 25% National Trust/English Heritage properties.

The proportions of visitors planning to visit each of the attractions/places of interest explored by the 2006/7 survey increased during the summer period.

For a full list of the 'other' attractions/places of interest listed by visitors see Appendix 2.



# Activities undertaken during visit

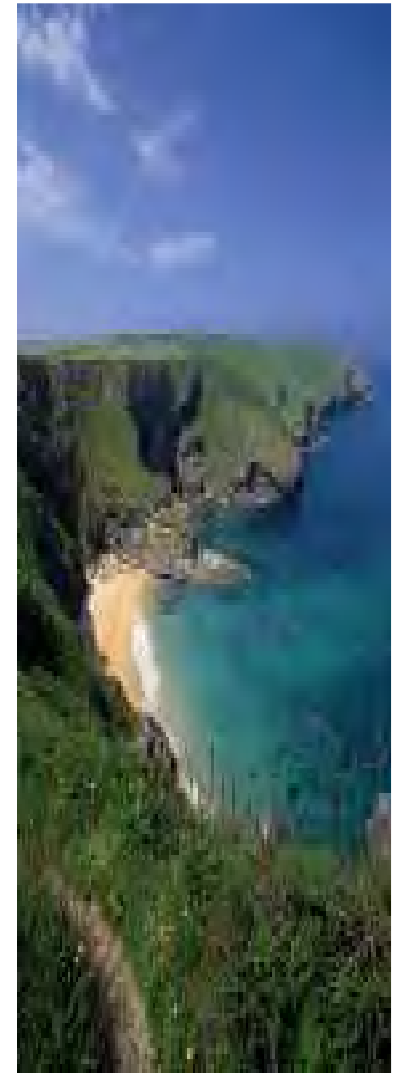
The 2006/7 survey asked visitors to indicate, from a list of activities, which they had/were likely to participate in during their visit to Cornwall. They were then asked whether this activity was the *main* reason for their visit to Cornwall. The results are displayed for all visitors below.

	Participate	Main reason for visit
• Spending half a day or more on the beach	40%	19%
• Swimming in the sea	21%	5%
• Visiting museums/art galleries	30%	2%
• Visiting heritage sites (e.g. castles/monuments/churches)	35%	1%
• Visiting theme parks	8%	1%
• Visiting the cinema	5%	-
• Shopping	76%	5%
• Short walk (up to 2 miles)	87%	10%
• Long walk (more than 2 miles)	44%	16%
• Cycling	4%	1%
• Sailing/yachting/boating	6%	3%
• Other water sports (e.g. surfing/windsurfing)	7%	7%
• Swimming (in a pool)	15%	1%
• Fishing	7%	3%
• Golf	4%	1%
• Other outdoor sport/pursuit	3%	1%
• Other	10%	31%

The most popular activities amongst visitors were going for a short walk, shopping, going on a long walk and spending half a day or more on the beach. Around half of all visitors who had/were planning to spend half a day on the beach indicated that this was the main reason for their visit to Cornwall with this proportion highest during the summer months.

## CHAPTER 9

# Likes & dislikes/suggestions for improvement



South West  
England

# Summary

- **Visitors to Cornwall particularly like the scenery/landscape/views (21%), followed by the opportunity to relax (18%) and the atmosphere (13%).**
- **When asked what, if anything, had spoilt the enjoyment of their visit to Cornwall or that they felt could be improved, 58% of visitors did not cite anything suggesting they were satisfied with their visit. 6% of all visitors mentioned the A30/road congestion and poor access to the county whilst 7% mentioned car parking availability and cost.**



# Introduction

This chapter explores visitors' particular likes or dislikes about their visit to Cornwall. This chapter details the findings for:

- Particular likes
- Dislikes/suggestions for improvement





# What did you particularly like about your visit to Cornwall?

The 2006/7 survey asked visitors to indicate what they liked most about their visit to Cornwall. The top 10 answers are listed below:

1.	Scenery/views/landscape/natural beauty/picturesque	21%
2.	Relaxing	18%
3.	Atmosphere/ambience/tranquil/laid back/slow pace/peaceful/quaint/peace & quiet/typically English	13%
4.	Sea/coastline	7%
5.	Beaches	6%
6.	Coastal walks/walking/cliff walks	6%
7.	Climate/weather/sunshine	6%
8.	Local people/friendly/friendly atmosphere	5%
9.	Spending time with family/friends	5%
10.	Plenty to do and see/lots for everyone/variety/different/diverse	3%
-	Away from home/get away from it all/makes a nice change	3%
-	Just fantastic/just love it/love Cornwall/marvellous/nice place/quality experience	3%

The scenery (21%), relaxing (18%) and the ambience in Cornwall (13%) were the top three likes listed by visitors, followed by the sea/coastline, beaches, coastal walks and favourable climate.

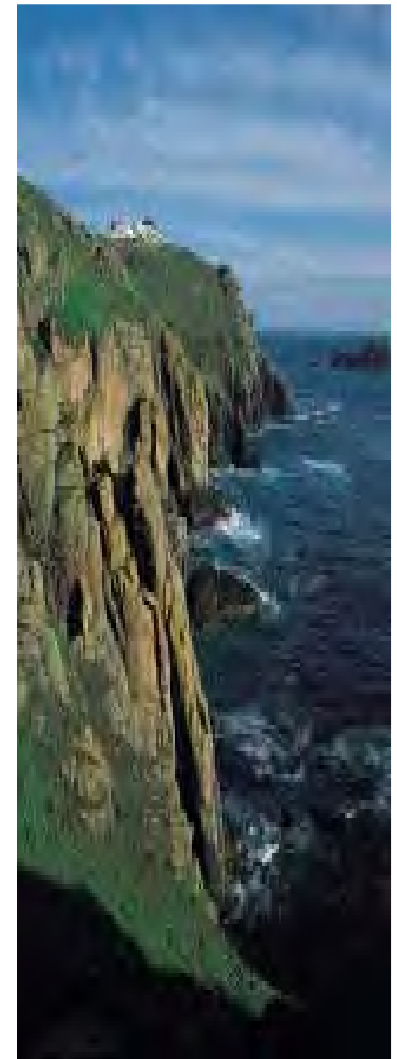
# What, if anything, spoilt the enjoyment of your holiday or do you think could be improved in Cornwall?

The 2006/7 survey also asked visitors to indicate what, if anything had spoilt the enjoyment of their holiday or what could be improved in Cornwall. 58% of visitors did not cite anything that had spoilt the enjoyment of their visit or which they felt could be improved. The top 10 answers are listed below:

1.	A30/access/road network/congestion	6%
2.	Improved/better car parking/better signage	4%
3.	Cost of parking/too expensive	3%
4.	Better public transport	3%
5.	Improved/better road signs	2%
6.	Pedestrian safety/pedestrianise	2%
7.	Better/cleaner public toilets/more/open all year around	2%
8.	Don't over develop/don't loose uniqueness/keep as it is	2%
9.	Run down/investment needed/derelict buildings/boarded up shops	2%
10.	Variety and choice of restaurants/food on offer/better restaurants/too expensive	2%

The A30/access/road network to Cornwall, along with improved car parking and public transport were the items most frequently mentioned by visitors.

# Appendices



South West  
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