

# Visit Conwy visitor survey results – May 2020





# Executive summary



In May 2020, the tourism team at Conwy County Borough Council conducted a visitor survey to determine how visitors would feel about returning for a holiday in the area after the Covid-19 pandemic. The survey also asked respondents what safety measures they would like to see implemented in the county.

1480 recipients completed the survey in total. Respondents received the survey through a variety of different channels including Visit Conwy social media pages and the Visit Conwy marketing database. We also asked local businesses to share the survey with their customers.

## **The key findings are as follows:**

- The highest proportion of respondents (592) are from North West England and are aged 65+. They like to travel as a couple.
- 64% visitors wish to stay for a few days / a week and 68% want to stay in traditional or small seaside towns. The highest proportion of respondents would like to travel to Conwy County in July 2020.
- 84% visitors will be travelling to Conwy County by car and 50% visitors do not feel comfortable using public transport whilst in the area.
- 59% visitors wish to stay in caravans or other self-catered properties and their choice of accommodation is not influenced by Covid-19.
- 60% visitors are very comfortable visiting outdoor attractions, with the most popular choices of attraction being beaches, mountains and gardens. They are not so comfortable visiting indoor attractions.
- 77% visitors feel moderately comfortable visiting cafes and restaurants whilst practicing social distancing.

The following report will provide an in depth analysis on the key findings highlighted above.

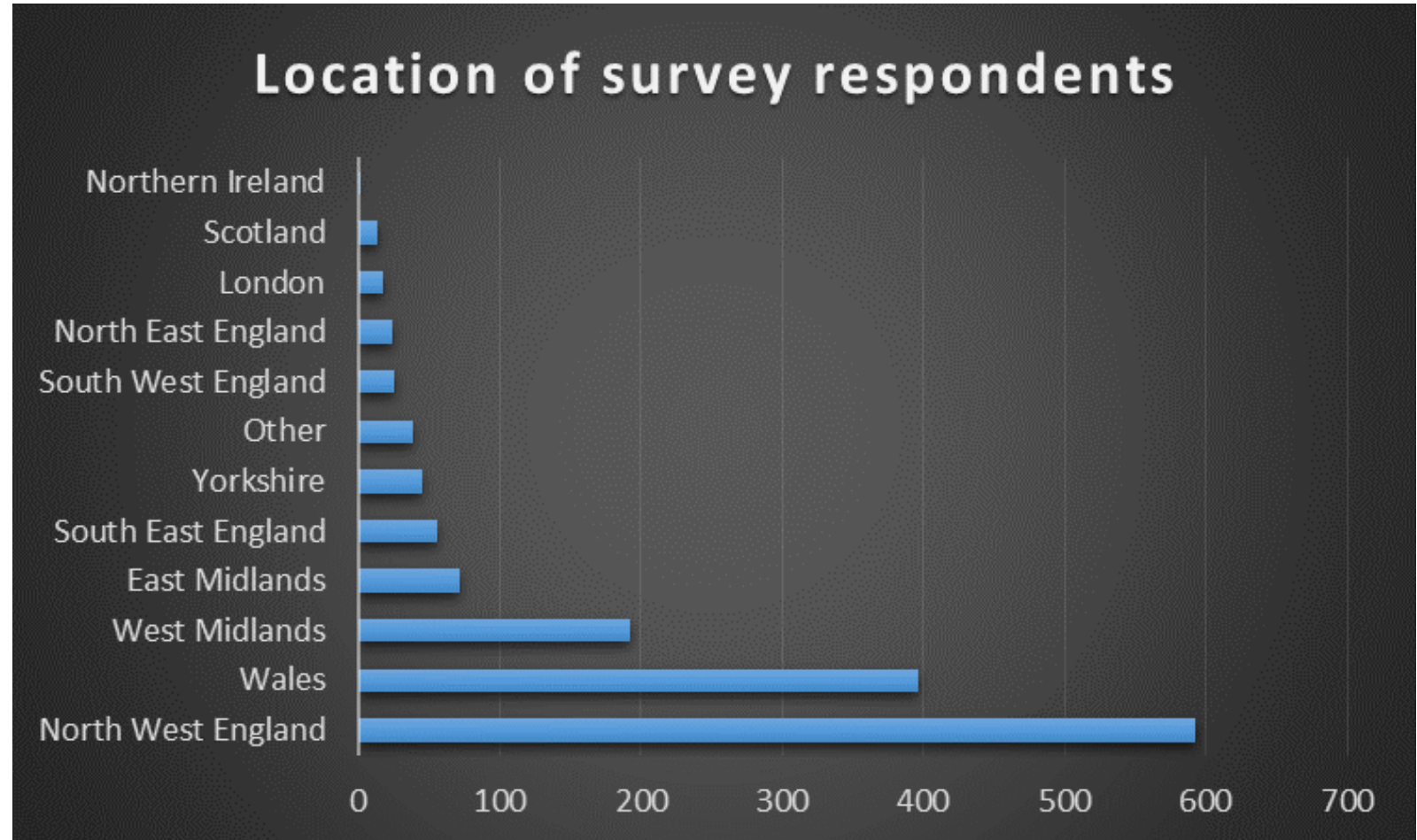
# The location of survey respondents



The highest proportion of respondents reside in North West England. We know this is a key market for tourism in Conwy County. The A55 makes it easy to commute from the North West to North Wales.

The location with the second highest number of respondents is Wales. We know this will be a key market in future because staycations within Wales are likely to become more popular in the aftermath of the pandemic.

Those who selected “other” were mainly international visitors, with America being the top international destination among respondents.



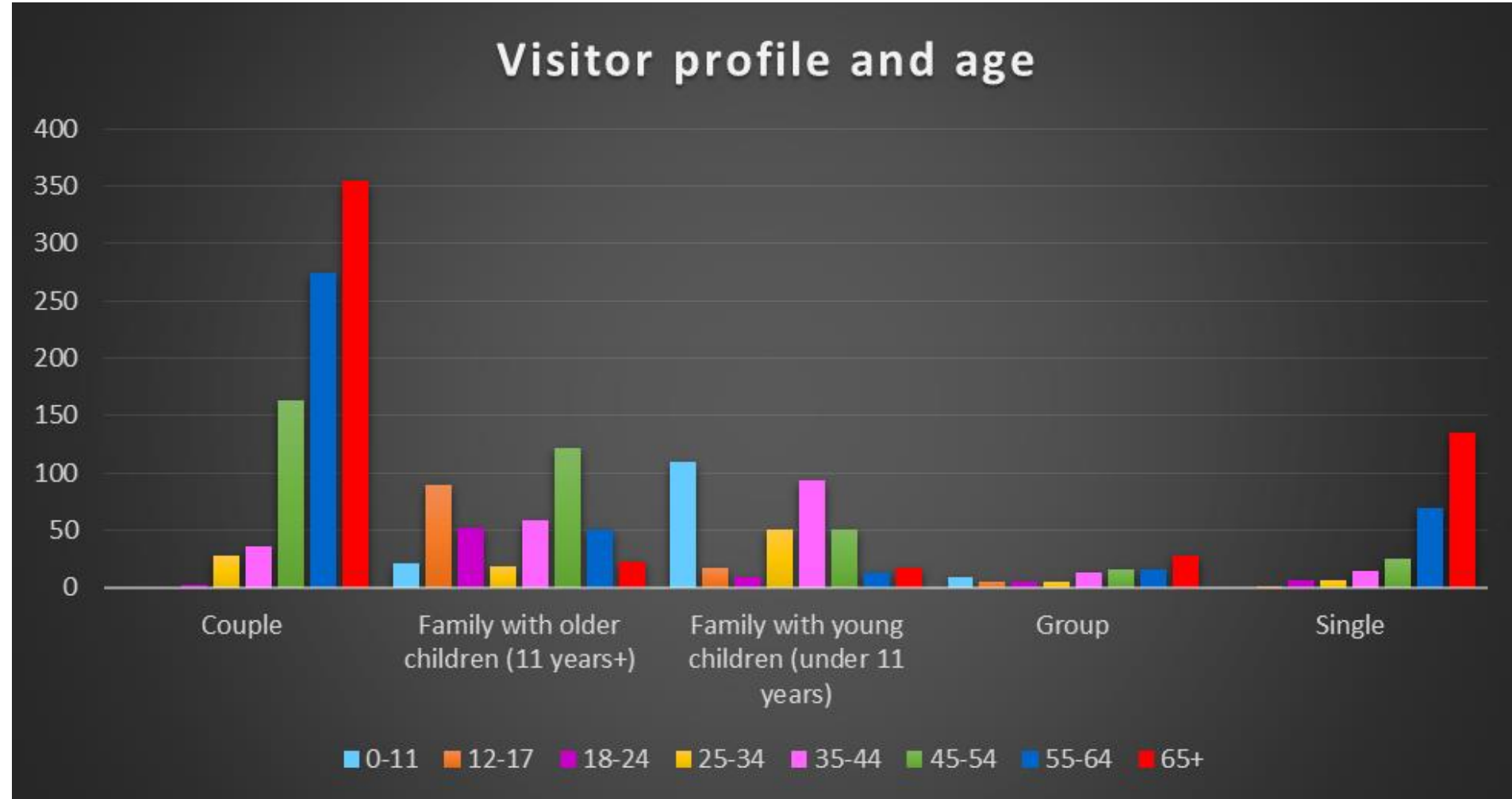
# Age of respondents and visitor profile



The highest proportion of respondents were couples who are aged 65+. Again, we know this group of people is one of our key audiences.

Overall, our main audience is couples who are aged over 45.

The family market forms our second largest audience.

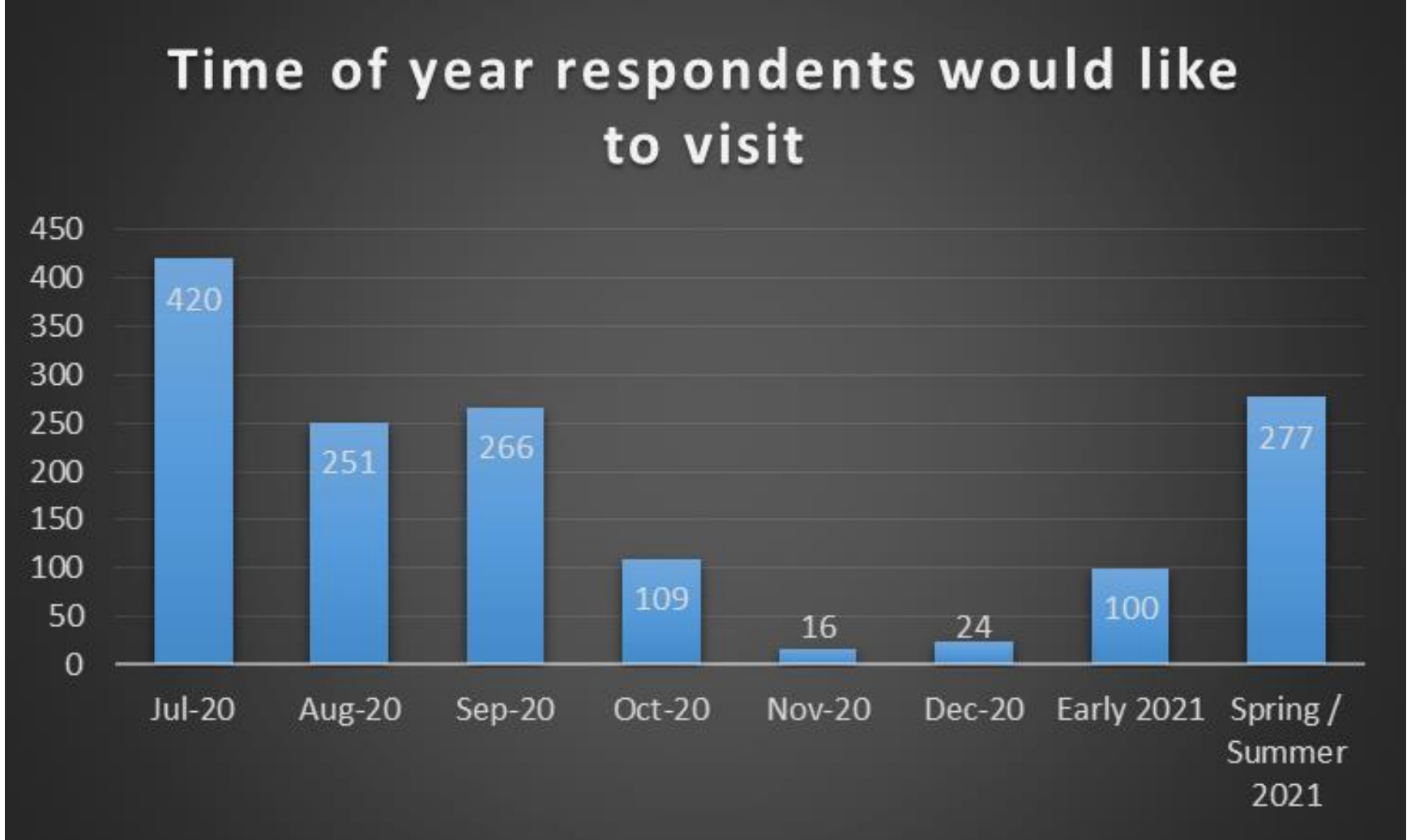


# Time of year respondents would like to visit



The highest proportion of respondents would like to travel to Conwy County in July 2020, providing restrictions have been eased.

This indicates that visitors are still extremely keen to come for a holiday in the area this year.

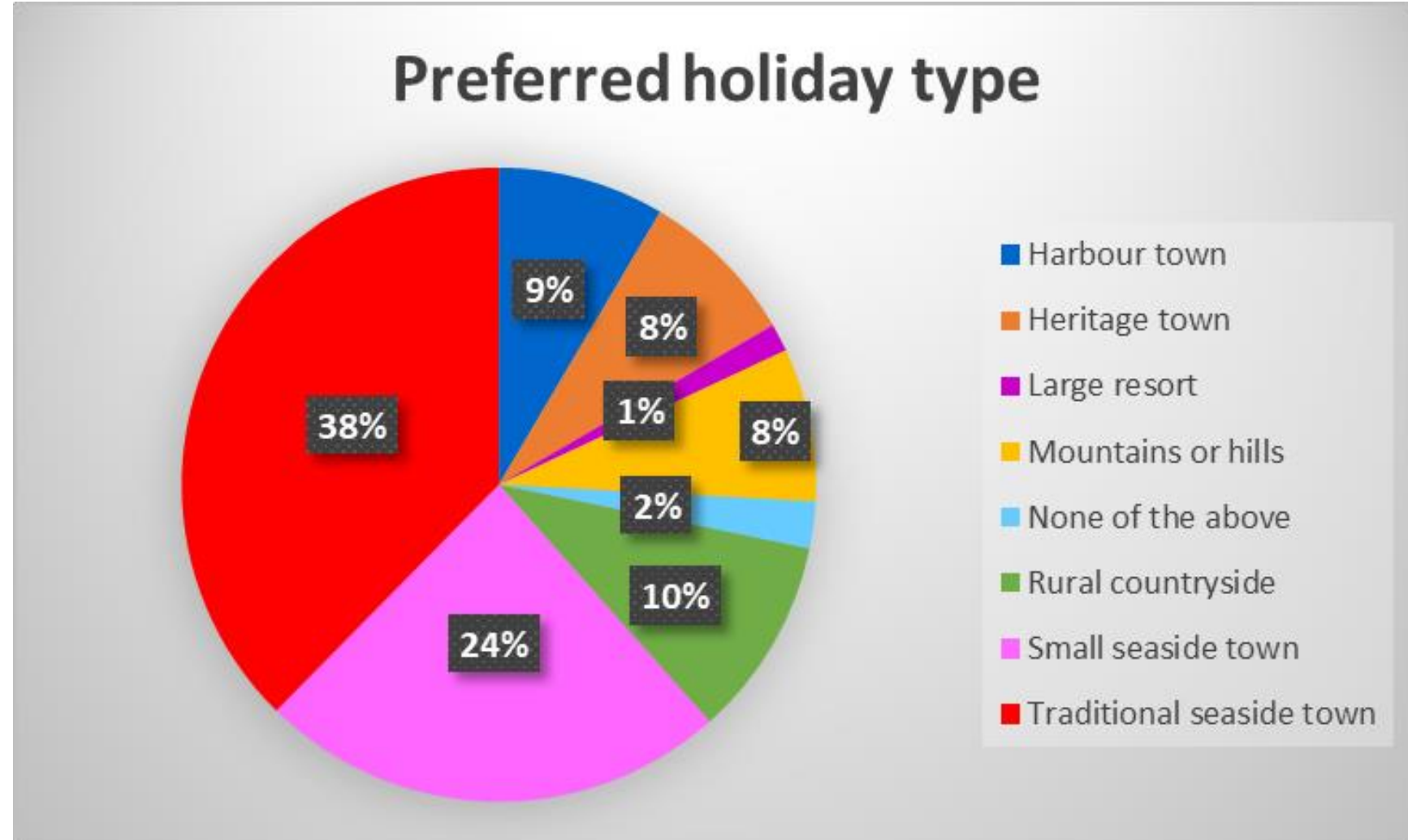


# Preferred holiday type

The majority of respondents (68%) said their preferred holiday type would be traditional or small seaside towns. This is possibly because visitors will want to escape large cities and holiday in quieter areas with fewer people around. Large resorts were the least popular option.

18% respondents said they would like to holiday in either rural countryside or near mountains and hills.

A marketing campaign may be required to ensure visitors are efficiently spread throughout the county to avoid congestion in one town / area.



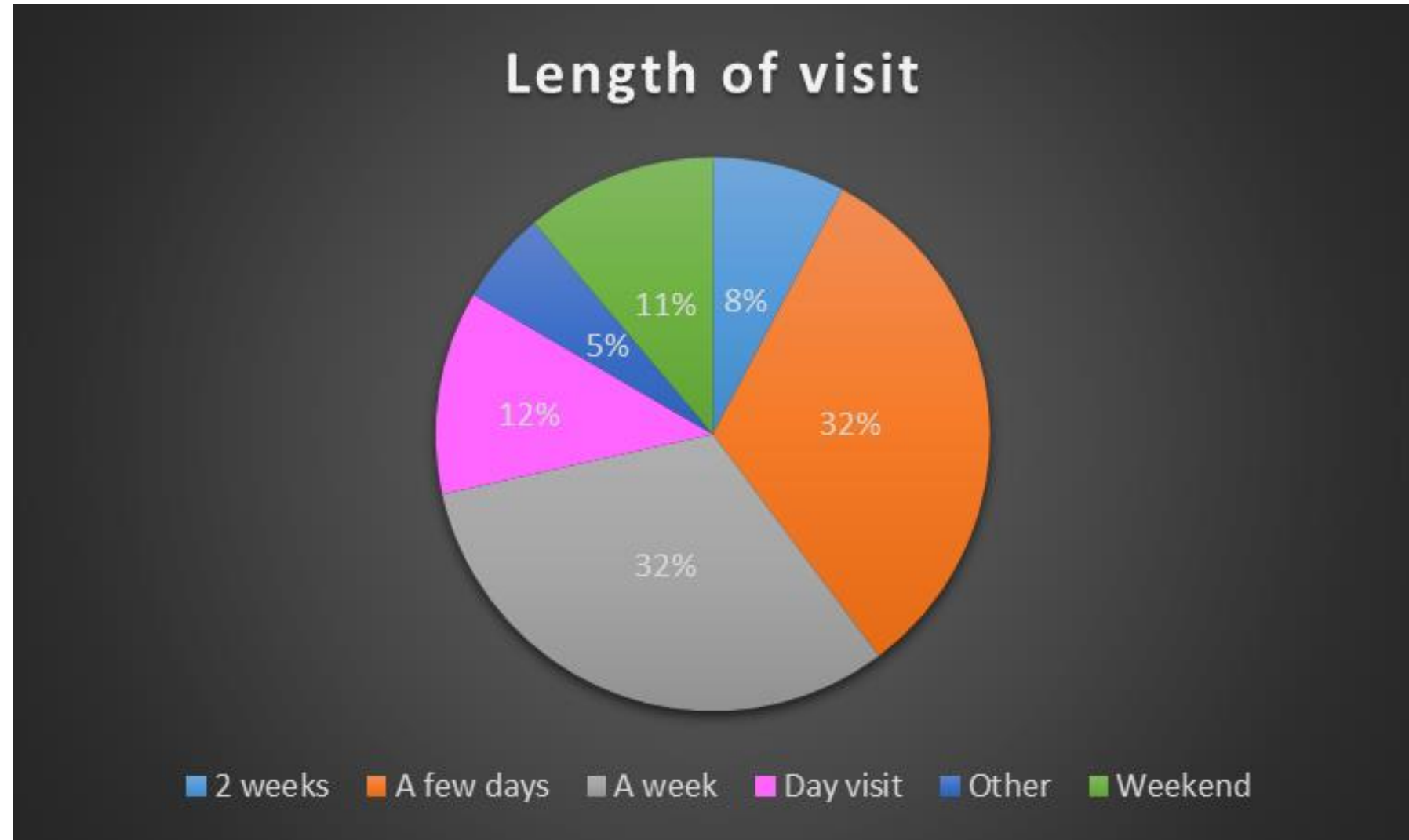


# How long visitors would like to stay



64% respondents said they would like to stay for a few days or one week on their next holiday to the county. This is encouraging in terms of recovering our economy since overnight visitors add more value to the local economy compared to day visitors.

Those who selected “other” indicated that they intend to visit regularly and / or stay for extended periods of time in a caravan or second home.



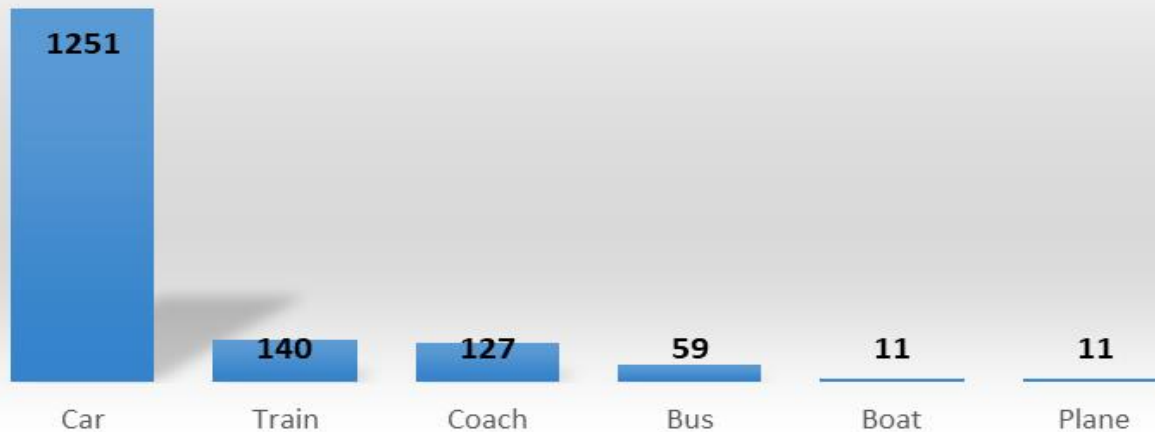
# Travelling to and around Conwy County



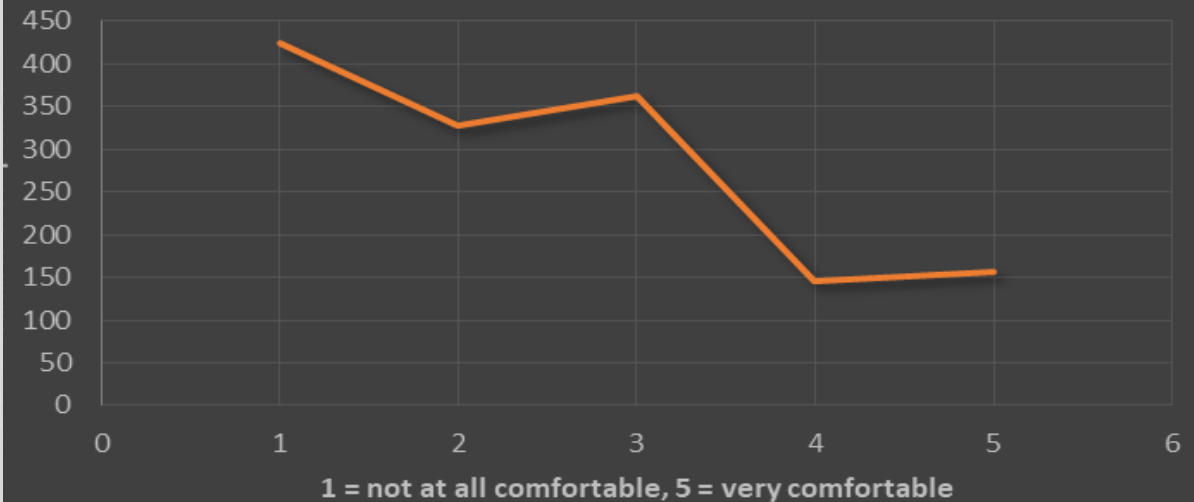
The majority of respondents indicated they would travel to Conwy County by car. Only a small proportion of respondents would travel via public transport.

This is most likely because there is still some fear around the safety of using public transport. This is clearly indicated by the line graph below. Overall, visitors would not feel comfortable using public transport. However, a significant proportion of respondents scored 3/5 when asked how comfortable they would feel using public transport. This indicates they do not have a strong view either way and could be persuaded to use public transport if we raise awareness of the measures that have been implemented to keep passengers safe.

## How do you intend to travel to Conwy County?



## On a scale of 1 to 5, how comfortable would you feel using public transport?



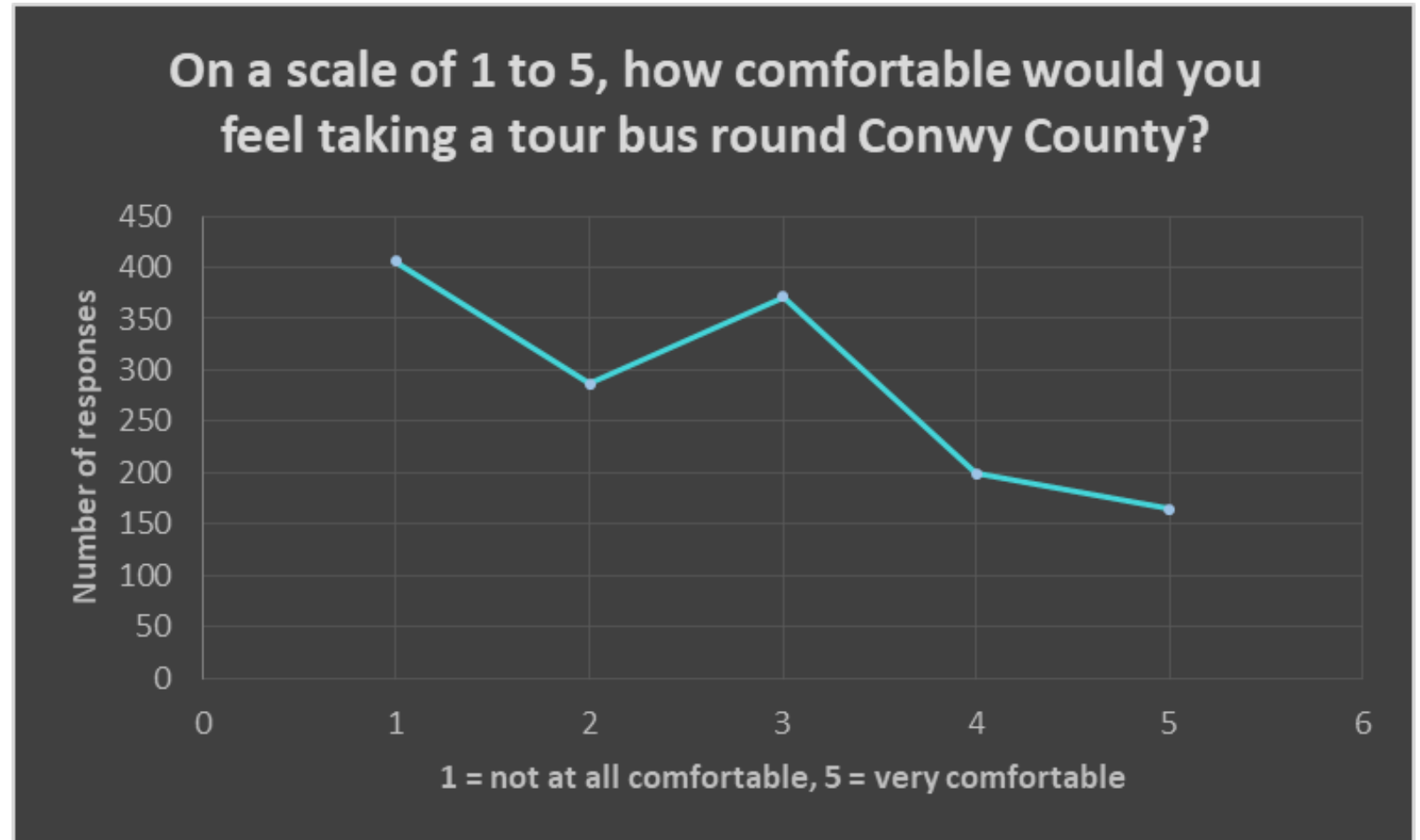


# How comfortable visitors would feel travelling via a tour bus



Overall, respondents indicated they would not feel comfortable travelling on a tour bus.

However, since a significant proportion of respondents answered this question with a score of 3/5, we can assume they have no strong feelings either way. Therefore, if tour companies plan messaging around what customers can expect when they book their next tour, as well as the measures they have taken to keep passengers safe, it may help to encourage visitors to feel more comfortable travelling on a tour bus.

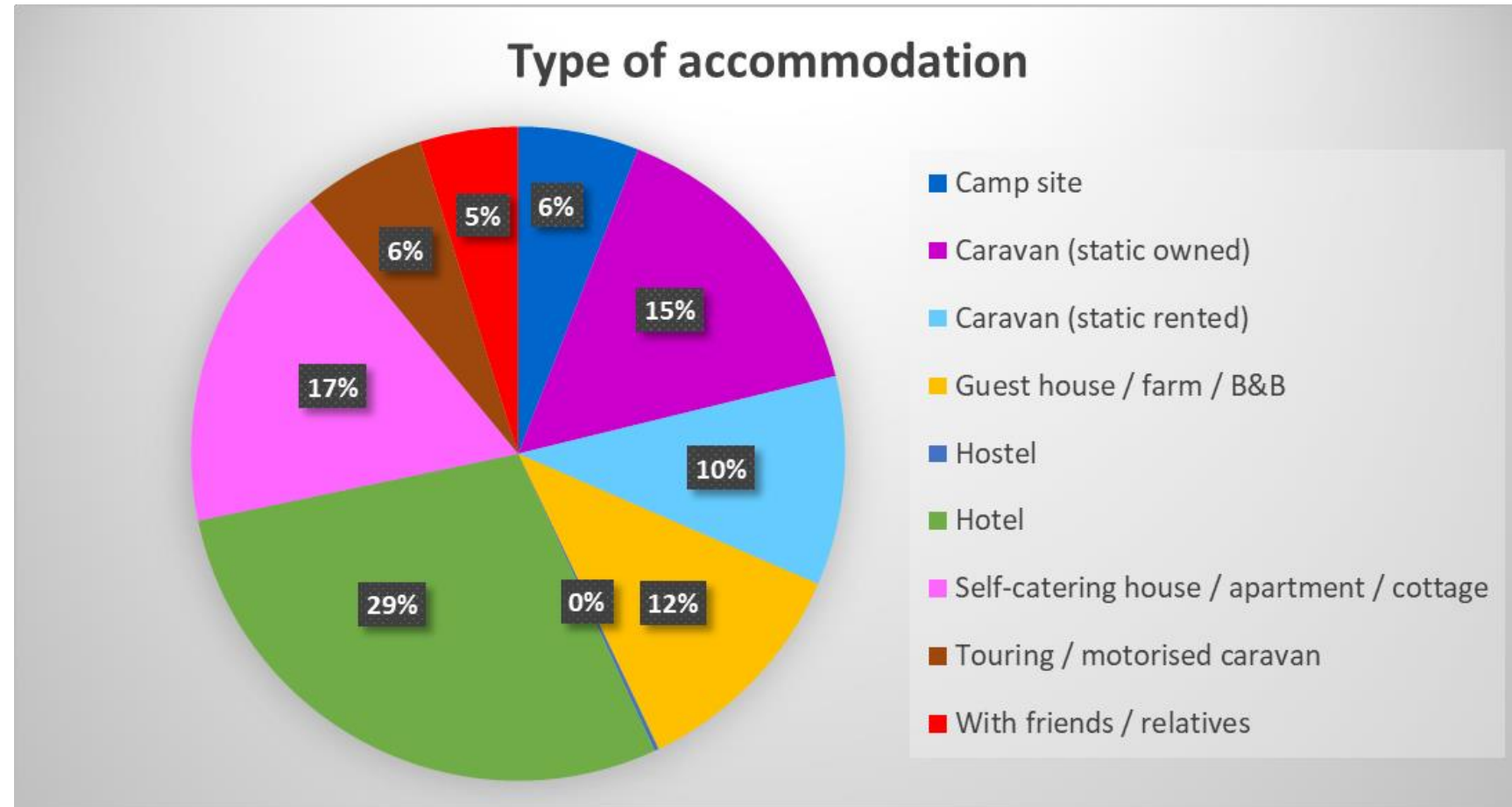


# Choice of accommodation

31% respondents indicated they would stay in an owned, rented or touring caravan on their next visit to Conwy County.

Interestingly, the second most popular choice of accommodation is hotels. This suggests visitors are not afraid to stay in accommodation that has shared facilities e.g restaurant / bar

Nevertheless, overall visitors would opt for a self-catered option as opposed to serviced accommodation. 59% respondents chose some form of self-catered accommodation compared to 41% who chose serviced accommodation.

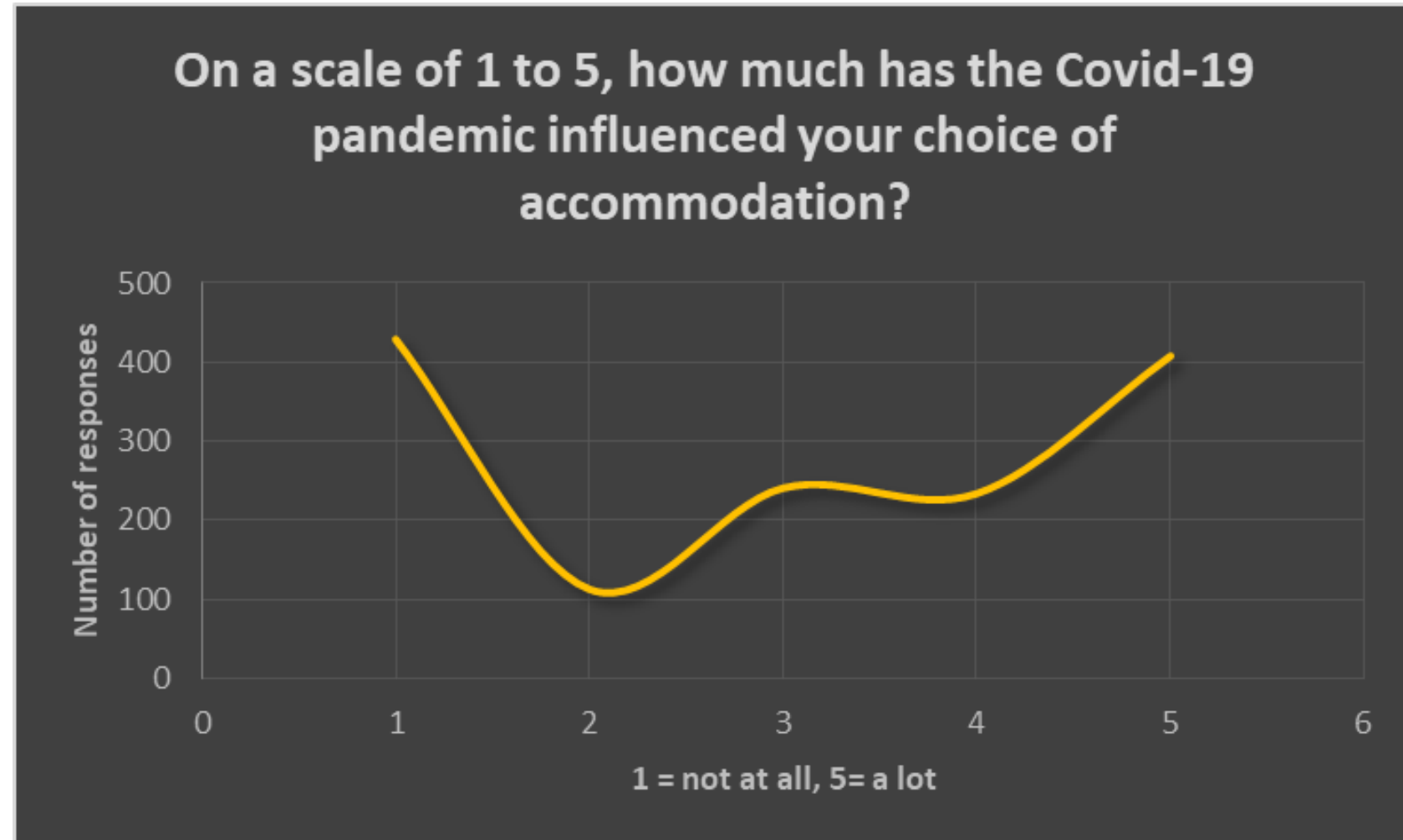


# How much has Covid-19 influenced visitors' choice of accommodation?



The highest proportion of respondents (428) indicated Covid-19 has not influenced their choice of accommodation. This could be because they own a caravan and would normally stay there. Another possibility is that they would normally stay with family and friends.

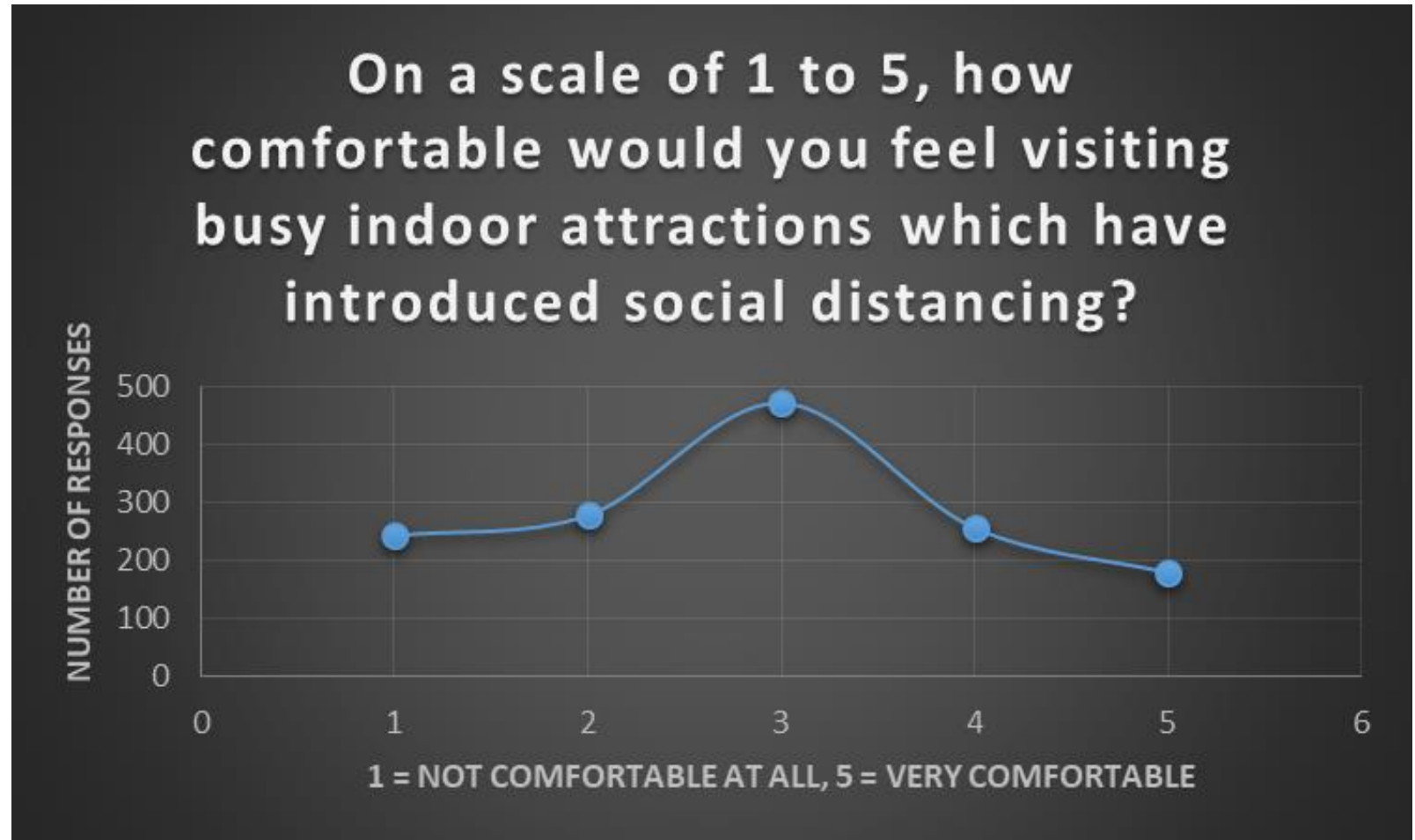
Nevertheless, a significant proportion of respondents (407) indicated Covid-19 would affect their accommodation choice.





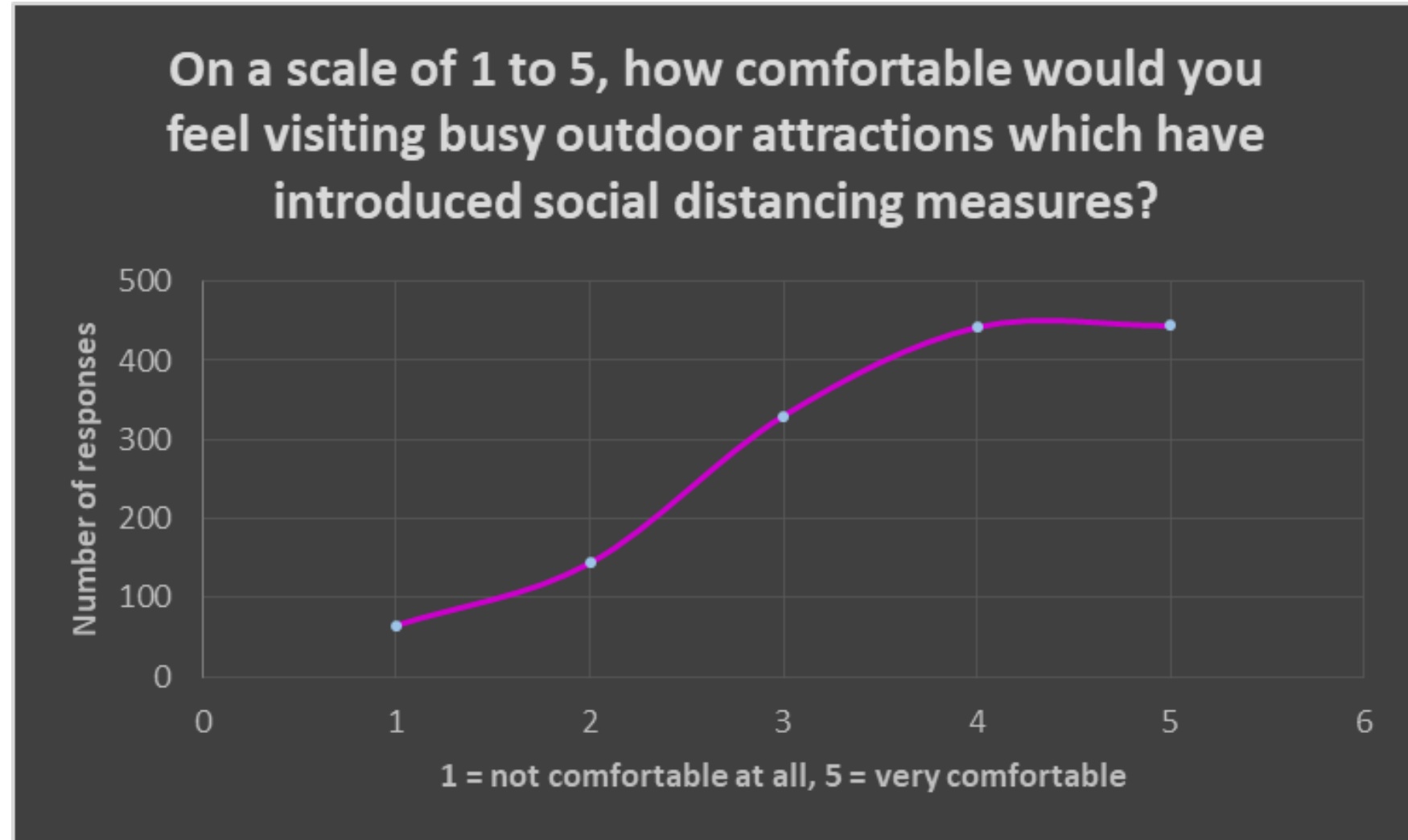
# How visitors would feel visiting busy indoor attractions

471 respondents scored 3/5 when asked how comfortable they would feel visiting busy indoor attractions on a scale of 1 to 5. This suggests they have not formed a strong opinion as to whether they would or wouldn't visit indoor attractions. Therefore, if indoor attractions plan messages which explain what visitors can expect when they arrive, as well as what safety measures have been implemented, they may be able to encourage visitors to feel comfortable visiting their attraction.



# How visitors would feel visiting busy outdoor attractions

The majority of respondents (60%) feel very comfortable visiting busy outdoor attractions. This is unsurprising given the current advice that there is less risk contracting Coronavirus whilst outdoors.



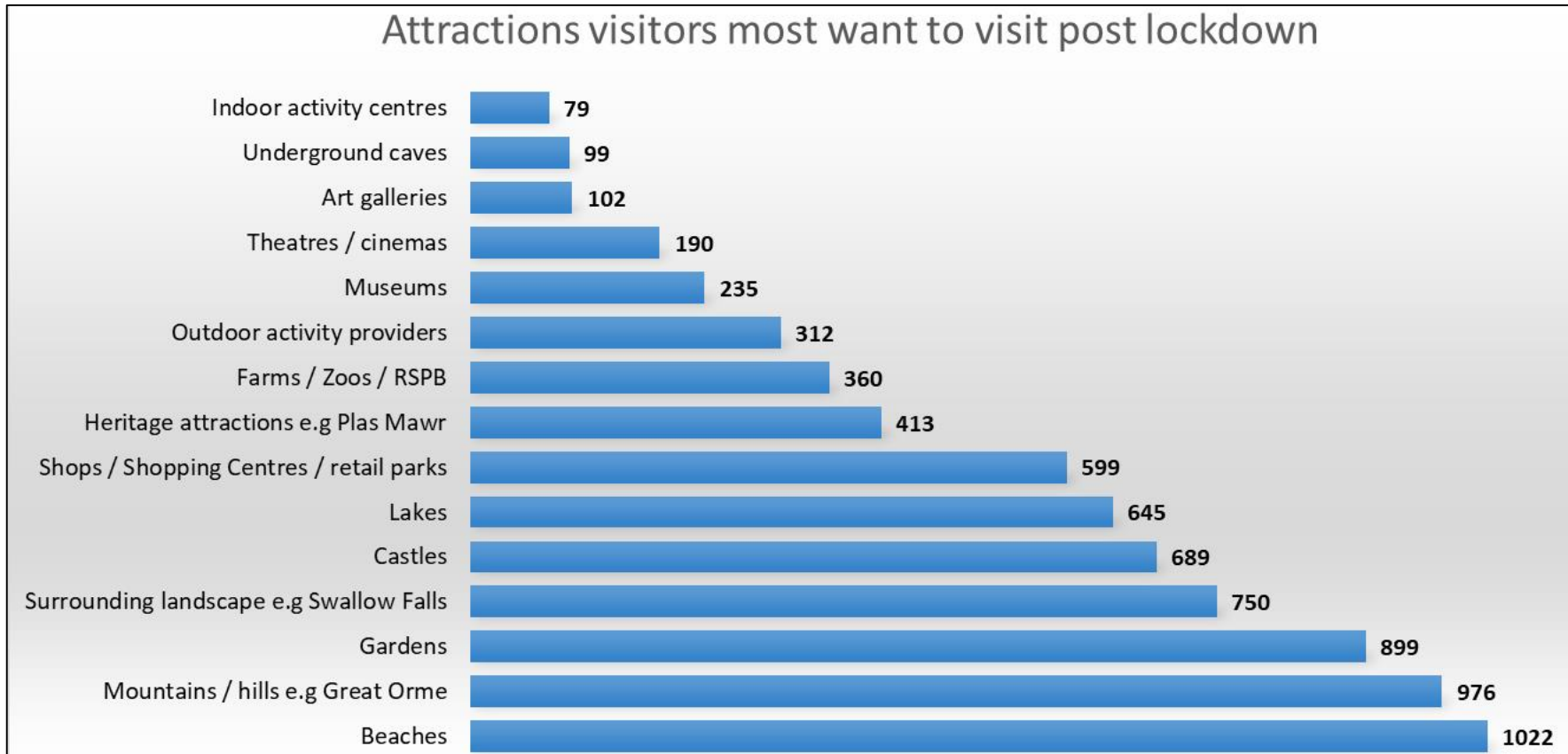
# Which attractions visitors want to visit post lockdown



Overall, visitors want to visit outdoor attractions once restrictions ease.

Beaches, mountains and gardens form the top three attractions which visitors most want to visit. These attractions all offer large open spaces, making it easier for visitors to practice social distancing. This is possibly the reason these attractions are the most popular choices among prospective visitors.

Indoor activity centres are the least popular attraction with prospective visitors at this current time.

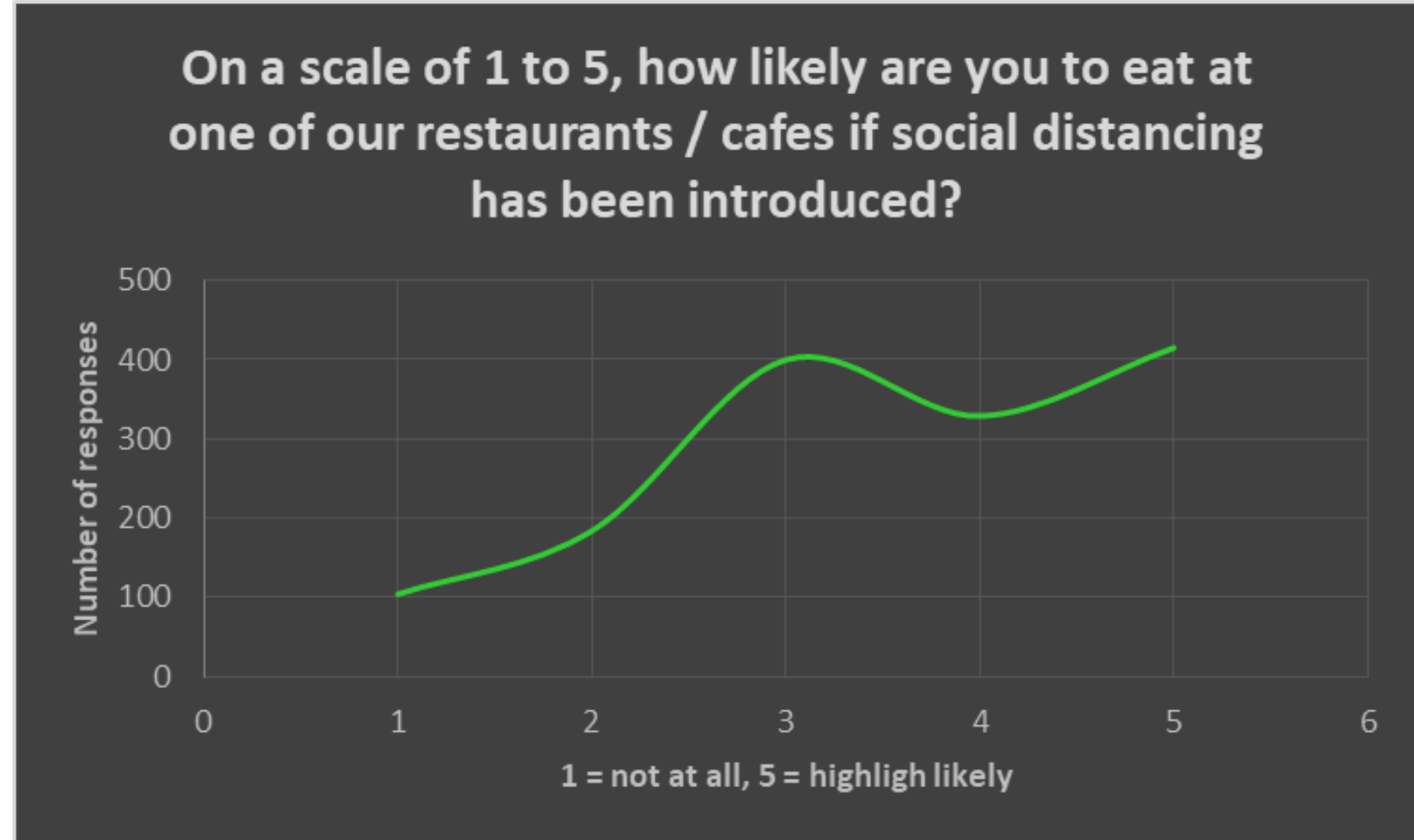




# How likely are visitors to eat at local restaurants and cafes

The majority of respondents (77%) feel reasonably to very comfortable visiting local restaurants and cafes which have introduced social distancing measures.

Again, restaurants and cafes will need to plan messaging and raise awareness of the measures they have taken to keep customers safe when they visit their premises.



# Why do visitors want to visit Conwy County?



The main reasons visitors want to holiday in Conwy County are listed below:

- 29% visitors said it's a beautiful location and they love the area
- 20% visitors said they regularly travel to the area
- 13% visitors said it's close to home so they don't have to travel very far
- 10% visitors have a second home in the area
- 9% visitors travel specifically to visit the countryside / mountains
- 5% visitors travel specifically for the beaches and coast

"I love Conwy and want to bring my grandchildren to play on the beaches, visit the castles and for them to see how beautiful your area is."

"Been coming to North Wales since I was a little girl, we've holidayed with our children in caravans and now visiting with our grandchildren. We love coming to North Wales very beautiful, safe, clean and always made welcome."

# What safety measures do visitors want to see implemented in Conwy County?



74% survey respondents provided suggestions to this question. Their main comments were as follows:

- 52% respondents indicated they wanted to see social distancing practised within the county to avoid overcrowding.
- 22% respondents commented that they would like to see additional hand sanitisers around the county, as well as in business premises.
- 9% respondents would like to see the police enforcing safety rules in the area.
- 8% commented that they would need access to clean public toilets.
- 6% respondents said they wanted to see clear safety signage and information around the county.
- 6% respondents suggested that attractions and indoor venues restrict the number of customers at any one time.
- 5% respondents wanted to see public areas being cleaned regularly.
- 3% respondents wanted to see more people in the area wearing face masks.
- 2% respondents wanted to see clean and safe outdoor eateries.

“As long as the shops cafes and other attractions have proper social distancing and everyone adheres to them I think people will be able to enjoy Conwy again”

“Good, clear, and well administered rules for busy public areas. I would like to feel happy that I could go to a park or beach and feel rules were in place and were monitored so everyone could enjoy the experience.”



# What marketing messages do visitors want to see?

74% respondents said they would like to continue to receive marketing messages from us during lockdown. The majority of these were happy to receive any kind of marketing message – they just wanted to keep in touch with us. Other messages people would like to be kept informed about are as follows:

- Updates on how restrictions ease in Wales and what safety measures business' have implemented to keep visitors safe.
- Information regarding general news in the area and any upcoming events.
- Information about which attractions visitors can go to.
- Positive news stories to instil hope in visitors.
- Information regarding any special offers.

Where respondents didn't want to receive marketing messages from us, the main reason was due to the fact they did not feel comfortable thinking about travel at this time.

"I am enjoying your visit Conwy later campaign - I don't think you need to share more than you are. This campaign is highlighting great things about the area, whilst also conveying the message to stay at home."

"I love seeing photos of the area, but would also be interested to know how businesses are coping with lockdown. Also, whether places to stay are taking provisional bookings for future dates, especially when restrictions begin to ease."

"Anything positive - as you have been doing already. Even though it is clear the region is 'closed', the messages have been very friendly, reassuring and optimistic."

# Other comments made by visitors

Only 32% respondents wrote comments in this section of the survey. The main comments made here were very positive. The majority of respondents (42%) commented on how they love the area and they are excited at the prospect of returning. They also wished us good luck for the future. Other comments included:

- Visitors want to see what measures have been implemented at local businesses to keep them safe.
- Some respondents made comments regarding anti-visitor sentiment on social media pages. Visitors would be reluctant to return if hostility from locals remains.
- Some comments were made regarding allowing second home owners / caravan owners to return to their properties for maintenance issues.
- Some comments regarding keeping the area clean. Pictures of overflowing bins / fly tipping have been shared on social media.

“Llandudno and area are wonderful holiday places. My 2 booked holidays were cancelled....hopefully to be booked later on. Well done for running such a lovely resort.”

“Thank you for all your hard work in keeping Conwy County such a delightful and pleasant place to visit.”

“Once restrictions are lifted nothing will stop me coming. I’ve visited for most of my 57 years and if I win the lottery I’ll be moving to live in the area.”



# Conclusion

In conclusion, this report highlights that visitors are extremely keen to return for a holiday in Conwy County once lockdown restrictions ease. There will likely be an influx of visitors from North West England who plan to stay for a few days in the area. Since 68% survey respondents indicated they wanted to stay in a seaside town, we may need to plan a marketing campaign to spread visitors around the county. This will help ensure our coastline doesn't become congested. If our beaches and mountains become too busy, then this could cause negative PR for our area – as it has in England. This would act as a deterrent for any potential visitors.

As our main market is couples 65+, we need to consider the fact that some people from this group may be nervous to visit any attraction / area which is deemed unsafe. Businesses will need to ensure they have sufficient safety measures in place e.g signs encouraging visitors to keep 2m apart, hand sanitisers etc. Businesses will also need to raise awareness about the safety measures they have implemented in their premises to encourage tourists to visit. If tourists know what to expect when they arrive and they can see sufficient safety measures have been implemented, they will feel much more comfortable visiting that particular business. The tourism team at Conwy County Borough Council is happy to share any messages with our visitors from businesses who would like to raise awareness of the safety measures they have implemented.

Overall, this report is a positive indication that the tourism sector in Conwy County has scope to recover after the Covid-19 crisis. Visitors are extremely keen to return to the area. We now just need to make sure we have sufficient plans in place for when lockdown restrictions ease so that we are able to welcome visitors back to our wonderful county once again.