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Visit Wales Tourism Market Demand Report – UK January 2023

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This document is also available in Welsh.

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Cardiff: Welsh Government, GSR report number 19/2023.

Available at: <https://www.gov.wales/tourism-market-demand-reports-january-2023>

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government.

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Background and Methodology



Background

As the Welsh Government's tourism team, Visit Wales is responsible for deploying tourism campaigns in the UK and internationally to promote Wales as a holiday destination. As part of this, each year Visit Wales conducts research amongst its priority markets. The research featured within this report covers the UK Market and broadly looks at:

- The factors influencing domestic holiday and short break choice
- Types of destination and experiences favoured on domestic holidays and short breaks
- Short breaks and holidays taken in Wales in 2022
- Short breaks and holidays planned in Wales in 2023
- Reasons for not visiting Wales in 2022 and for not planning to visit Wales in 2023
- The appeal of touring trails in Wales
- Engagement with Visit Wales information channels and marketing
- The impact of the World Cup on perceptions of Wales
- Profiling and demographics

Methodology

Respondents were contacted through an online panel which could be completed via desktop or mobile device. To qualify for the survey, participants must belong to the **UK domestic holiday market (a term used throughout this report)**. We define this as:

- Must be a holiday or short break decision-maker
- Must have taken a UK short break or holiday in the last 5 years
- Must be seriously considering taking a holiday or short break in the UK in the next 12 months.

Fieldwork took place from 3rd January to 17th January 2023.

There were 1,136 completed surveys. The first 1,000 responses were nationally representative of the UK's domestic holiday-taking population. A boost of 136 surveys were then conducted amongst residents of Wales. The data was then weighted to be representative of the UK's domestic holiday-taking population, ensuring comparability to previous studies. Data was weighted by gender, age, social grade and region of residence.

The survey took 25 minutes to complete on average.

Where possible, comparisons are made to previous surveys of this type, conducted in June 2022 and before the pandemic in January 2020. Please note, some differences may be driven by seasonal changes.

Definitions used within this report (1)

In this report we use a number of terms to define the survey respondents. These include:

- **The UK domestic holiday market:** The total survey sample. Residents of the UK who are seriously considering a holiday or short break in the UK in the next 12 months
- **Wales trip takers:** Residents of the UK who stated they took a holiday or short break in Wales in 2022. Trip behaviour for this audience relates to the whole year.
- **Wales trip intenders:** Residents of the UK who are definitely or probably intending to take a holiday or short break in Wales in the next 12 months. Trip behaviour for this audience relates to their next trip planned in Wales so will be naturally biased to earlier in the year. With this in mind, trips planned for 2023 should not be compared to trips taken in 2022.

To deliver clearer profiles, we also profile by life stage. Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, we have used the following:

- **Pre-nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older independents:** Aged 35-64 with no children in household
- **Retirement age:** Aged 65+.

Definitions used within this report (2)

We also use 'social grades' within this report. Social Grade is a classification system based on occupation and broadly aligns with income. It has been used as a standard within market research for a number of decades to build an understanding of respondents alongside a number of other factors. In this report, social grade should be assessed alongside life stage, financial and attitudinal segments. Broadly, social grades are outlined as below:

- **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 with state benefits only**

Key Findings



Key findings (1)

UK Domestic Holiday Market

1. This research identifies the UK domestic holiday market as those who have taken a holiday or short break in the last 5 years and who intend to take another trip in 2023.
2. Families make up the largest proportion of the current market (37%), followed by Older Independents (27%) and Retirees (23%). Pre-Nesters are the smallest segment of the current market (13%).
3. The domestic market is skewed towards ABC1 socio-economic groups making up two thirds of current visitors.
4. The region of residence of the domestic holiday market broadly replicates the UK population and is spread across the regions and nations of the UK.

Key findings (2)

Trip Influences and Preferences –UK Holidays

1. Finances continue to play an important role in the domestic holiday market. ‘Great value for money’ is the number one destination influence for domestic holidays/short breaks in the next 12 months – consistent across all social grades. Whilst ‘great value for money’ does not necessarily mean ‘low cost trips’, lower priced options are likely to be favoured across most elements of the holiday trip.
2. ‘Ease of travel to and getting around the destination’ is the next most important influence for the UK holiday market. ‘Travel access’ is the leading reason for those not considering visiting Wales in 2023, as well as for non-visitors in 2022. Whilst this is largely driven by distance *from* Wales, it may also reflect some negative perceptions of travel in Wales.
3. Beyond these practical factors, ‘incredible landscapes and scenery’, ‘high quality accommodation’, ‘famous landmarks and attractions’ and ‘a destination rich in history and heritage’ are the next most important influences on domestic holiday choice.
4. ‘Cities and large towns’, ‘scenic coastline and harbours’ and ‘traditional seaside resorts’ are the destination types the UK holiday market are most likely to visit for a UK short break/holiday in the next 12 months – nearly half are planning to take a trip to each. ‘Historic and heritage towns’ and ‘scenic countryside and villages’ are the next most popular types of destination being considered by 2 in 5 of the current UK holiday market.
5. Trip preferences vary by life stage. ‘Pre-nesters’ and ‘older independents’ state ‘cities and large towns’ as their preferred destination type; for families, ‘traditional seaside resorts’ lead the way. Respondents of ‘retirement age’ favour ‘scenic coastline and harbours’ and ‘historic and heritage towns’ more than other life stages.
6. The types of holiday experiences sought by the UK domestic market tend to reflect destination preferences. Older life stages tending to prefer history, heritage, famous landmarks, scenery and landscapes, whilst retirees are the most likely to explore scenic areas by car.
7. Unsurprisingly, families are the most likely to be interested in ‘visiting family attractions’ as well as looking for ‘lots of activities and things to do’ including outdoor attractions and heritage sites.
8. ‘Trying local food and drink’, ‘health or wellbeing experiences’ and ‘speciality shopping’ are of relatively high interest to ‘pre-nesters’.

Key findings (3)

Destination Relationships and Trips to Wales in 2022

1. The West Country and The South Coast of England are the areas of the UK most likely to generate regular holidays or short breaks, Wales relatively close behind in third.
2. Wales residents exhibit the highest 'loyalty' to Wales in terms of trips, half of them 'often taking short breaks or holidays there and intending to do so in the next year'. Proximity to Wales is a strong driver of regular visits - behind Wales, the neighbouring regions in the North West of England, the West Midlands and the South West of England exhibit the strongest level of repeat visits to Wales.
3. Beyond these core areas, there is potential interest from first time or less frequent visitors from London/SE England, East England and Yorkshire and Humberside.
4. By life stage, families are the most likely to be 'regular' visitors to Wales. Older independents' and 'retirees' are the age groups most likely to have visited Wales once or twice, with a desire of doing so again. 'Pre-nesters' the most likely to state they've never been but 'would like to'.
5. 18% of the UK holiday market stated they visited Wales for an overnight short break or holiday in 2022.
6. Families were most likely to have taken a trip to Wales in 2022. 'Retirees' and 'older independents' were less likely to visit Wales in 2022, but have higher visitation in previous years—indicating an opportunity to 'reactivate' trips to Wales from these life stages.
7. June and August 2022 had relatively more visitors to Wales compared to other months of the year although this unsurprisingly varied by life stage. Visit levels were notably stronger for the Spring than for Autumn and Winter 2022.
8. Overnight visitors to Wales stayed in a range of different destination types in 2022. Just over a quarter went to a 'scenic coastline or harbour', with 1 in 4 staying in 'mountains or hills', a 'traditional seaside resort' or a 'scenic countryside/village'. Trips to cities and towns were notably lower, an opportunity for Wales to grow as they have the highest level of interest amongst UK trip considerers.
9. North Wales was the most visited region in 2022 by respondents to this survey, with South West Wales the second most visited region.

Key findings (4)

Future visits to Wales in the next 12 months (*next trips*)

1. A quarter of the current 'UK holiday market' (respondents to this research) state they have either 'already booked' or 'are definitely visiting' Wales for a holiday/short break in 2023, with a further 1 in 4 indicating they will 'probably' visit. At the time of the survey, a minority of these had 'already booked' their trip. Previous research indicates that not all those who report intending to visit will do so.
2. Families are more likely to indicate they will visit Wales for an overnight trip in 2023. Trip intentions are also higher for Pre-nesters compared to Older Independents and those of retirement age. However, pre-nesters are also less likely to report that they will take a short break or holiday to Wales within the next year than other life stages.
3. Residents of Wales show the strongest likelihood of taking a short break or holiday in Wales in 2023. However, residents of the North West of England are the most likely to have 'already booked', followed by other neighbouring regions the South West of England and the West Midlands.
4. Wales trip intenders are most likely to be planning their next Wales trip in July or August 2023. Trip intentions are higher for May and June compared to September and October, but this will partly reflect the timing of the survey as responders were asked about the timing of their *next* trip to Wales.
5. Just over one third of Wales intenders plan on staying for a long weekend in Wales on their next trip (driven by pre-nesters and families), with nearly a quarter aiming to take a trip that includes both weekdays and weekend days (driven by retirees).
6. Nearly 3 in 5 intenders plan to visit Wales with their partner on their next trip and 2 in 5 with their children/ grandchildren. Friends will accompany people on 1 in 6 trips and pets on 1 in 10 trips.
7. A variety of destinations are being considered for trips to Wales in 2023, similar to the pattern of visits in 2022, but interest in visiting historic towns is slightly higher, whilst intentions to visit cities or large towns remain below rural destinations.
8. 'Walking and hiking' is the leading activity planned for next Wales trips in 2023, followed closely by 'trying local food and drink', 'visiting outdoor visitor attractions', 'visiting heritage or cultural attractions' and exploring scenic areas by car.' These interests vary by life stage.
9. There is strong general interest in festivals/events in Wales amongst Wales 2023 intenders – 'food and drink', 'local produce/arts/crafts', 'non-competitive walking/cycling', 'country/garden shows' and cultural/arts festivals' generating the strongest interest.

Key findings (5)

Barriers to taking a short break or holiday in Wales in 2023

1. The two leading reasons for not visiting Wales in 2023 are 'too far to travel' and 'cutting back on UK trips'.
2. Compared to 2022, non-Wales visitors in 2023 are more likely to state they 'can't afford a trip to Wales' and that they are 'taking an overseas holiday instead', underlining the growing appeal of overseas trips compared to immediately after the pandemic.
3. The cost of living crisis is likely to have a widespread influence on trips taken in Wales in 2023, with 3 in 4 potential visitors indicating some change in their holiday plans to help manage costs. The main reported changes in behaviour are 'I will choose cheaper accommodation', 'I will look for more free things to do' and 'I will look for special offers/deals', and nearly 2 in 10 may also cut back spending on eating out or shopping during their trip.

The Appeal of Touring/Trails

1. Nearly three quarters of the UK market would be interested in taking a long distance trail around Wales in the next few years, with 'walking/hiking' and 'self-driving routes' the most preferred. 'Pre-nesters' and 'families' tend to show the most interest in long distance trails, suggesting that such an initiative would be an effective way of attracting new younger audiences.
2. 'Walking/hiking', 'nature and wildlife' and 'heritage sites' are the most appealing 'special interest' trails although there is variation by life stage.
3. 'Food, drink and foraging' and 'walking trails' have highest appeal for 'pre-nesters', whilst 'heritage sites', 'self-driving routes', 'scenic tours', and 'gardens' have more interest for older life stages. Families are most interested in trails based around 'nature and wildlife', 'walking', 'food and drink' and 'heritage sites'.
4. 2-3 days is the preferred length of a tourist route or trail in Wales with 4-7 days also popular.

Key findings (6)

Tourism Marketing Impact

1. Overall, respondents are most likely to state they have heard about the same or a lower level of promotion of Wales as a place to visit in the last few months.
2. Word of mouth and television advertising are the leading sources of information that responders have seen, with around 1 in 4 stating they had definitely seen one of the Visit Wales promotional films in the last few months.
3. Around 2 in 5 report engaging with Visit Wales digital channels in some form in the last 12 months, 'with visiting the Visit Wales website' and 'following the Visit Wales Facebook page' the leading ways of doing so.
4. Perceptions of the Visit Wales promotional films shown to the survey responders were positive, with a strong majority agreeing that they 'paint Wales in a very positive light', 'make Wales look very appealing for a holiday or short break' and 'will make people more likely to consider Wales for a holiday or short break'.
5. The promotional films were found to be most positively communicating incredible scenery, lots of activities and things to do and great places to explore off the beaten track. They were less associated with great value for money, high quality accommodation, welcoming people and food and drink, which are important factors driving holiday choice.

Engagement with the Football World Cup

1. 2 in 3 people stated they saw some form of media coverage of Wales during the Football World Cup.
2. Watching a Wales match was the main source of engagement, followed by media coverage of the Wales team or fans at the tournament.
3. Over 1 in 10 stated they saw a promotional film or other form of advertising for Wales in relation to the tournament.
4. Welsh residents and people with a connection to Wales other than nationality were more likely to have seen all coverage of Wales during the tournament.
5. Around half of the respondents who saw some form of coverage of Wales during the World Cup stated it made them more positive about Wales.

Demographics of the Domestic Holiday Market



Gender and life stage of the domestic holiday market

- The gender split of the domestic holiday market (members of the UK public considering an overnight domestic trip in the next 12 months) is relatively even, 'families' are the largest life stage. 'Pre-nesters' are by far the smallest life-stage within the domestic holiday market, making up just 13%, with those of 'retirement age' making up 23%.

Figure 1. Gender of respondents (weighted), Percentage, All respondents

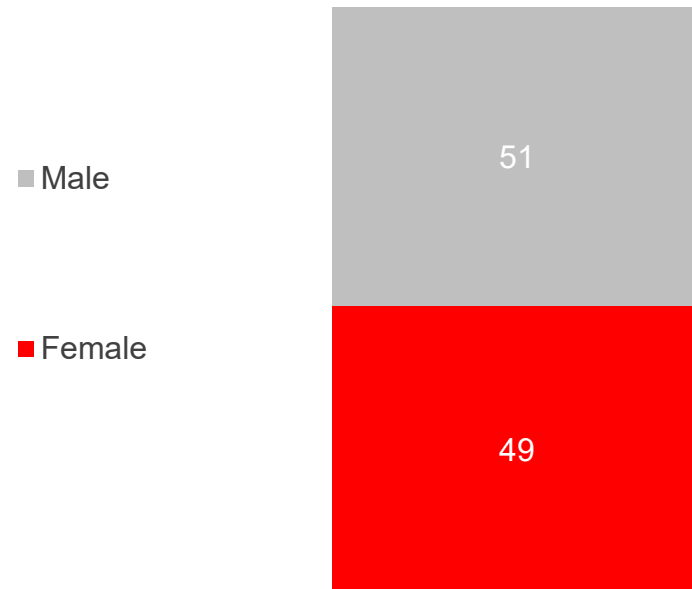
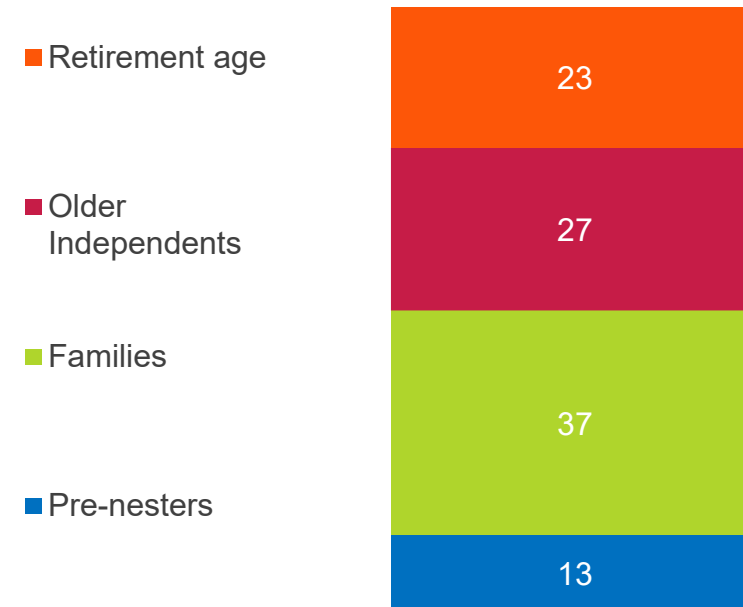


Figure 2. Life stage of respondents, Percentage, All respondents



Employment status and social grade of the domestic holiday market

- Around half (46%) of the domestic holiday market is in full-time employment, around 1 in 5 (21%) are retired.
- The majority (62%) of the domestic holiday market fall into social grades ABC1.

Figure 3. Employment status of respondents, Percentage, All respondents

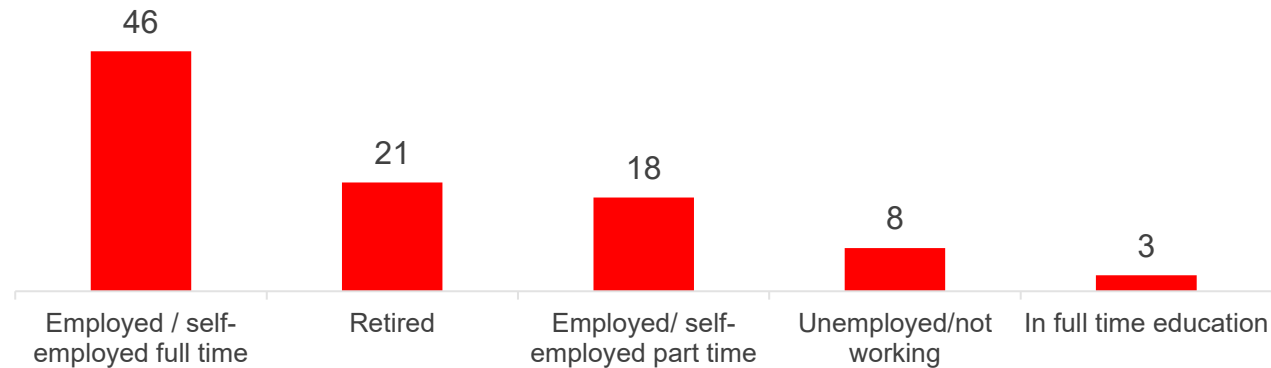
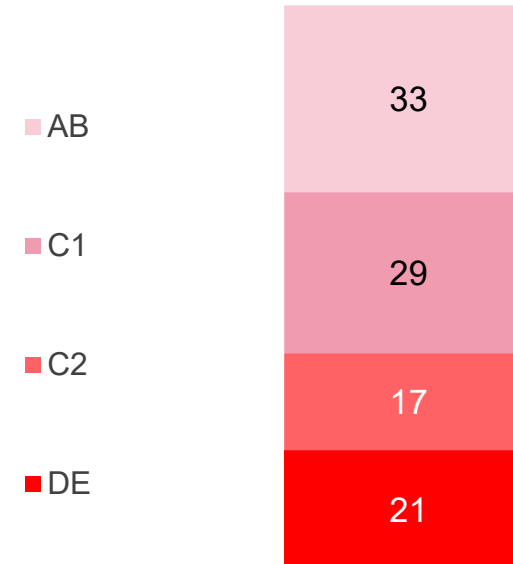


Figure 4. Social grade of respondents (weighted), Percentage, All respondents



X3a. Which of these best describe you? X4a. Which one of these best describes the occupation of the main income earner in your household? X4b. You say that the main income earner in the household is now retired. Which one of the following best describes their occupation before they retired?

Base: All respondents n=1,136

Attitude to 'cost of living crisis' overall and by social grade

- Two thirds (66%) of the domestic holiday market have either been 'hit hard' by the cost of living crisis so far, or 'are ok but have to be careful'. Only a third (33%) believe they will not be negatively impacted.
- Social Grades AB are the least impacted – 44% either 'better off than before' or not affected and confident they won't be', Social Grades DE appear the most negatively impacted – 37% 'hit hard' compared to 20% across the whole domestic holiday market.

Figure 5. Impact of cost of living crisis so far, Percentage, All respondents and by social grade



X4c. There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents n=1,136; Social Grade AB n=366; C1 n=315; C2 n=229; DE n=221

Region of residence and relationship with Wales

- The region of residence of the domestic holiday market broadly replicates the UK population, with ‘the South East of England’, ‘London/Greater London’ and the ‘North West of England’, having the highest representation.
- Around 3 in 10 (37%) have some sort of existing ties to Wales - ‘having family and friends who live there’, the most dominant (17% falling into this category).

Figure 6. Region of origin of respondents (weighted), Percentage, All respondents

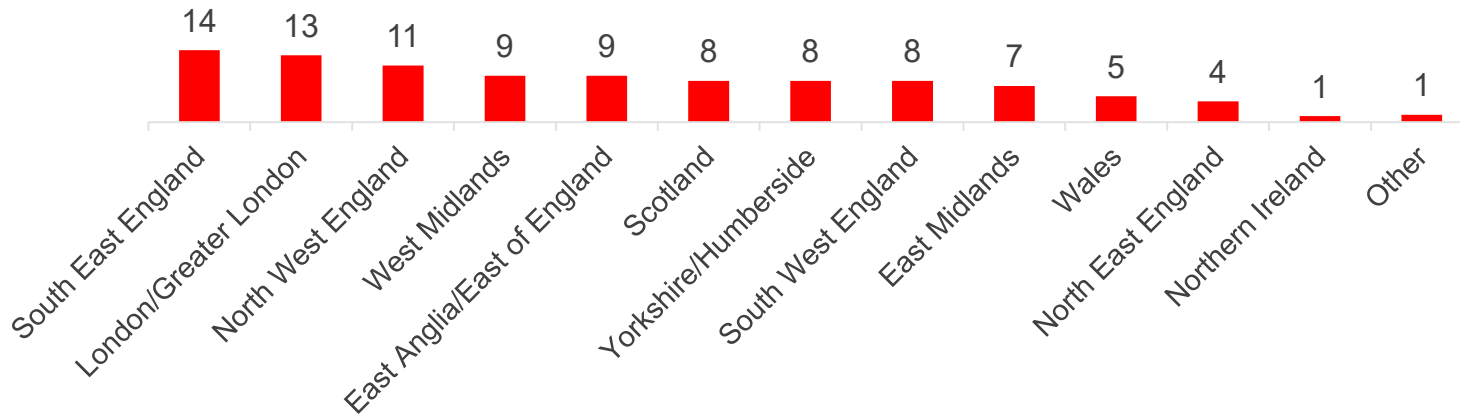
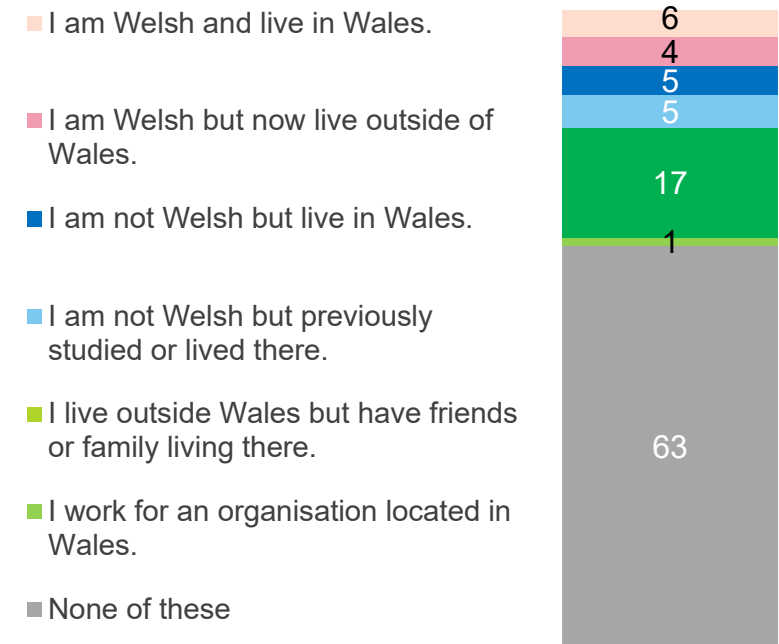


Figure 7. Relationship with Wales, Percentage, All respondents



Demographics questions. S3. Where in the UK do you live? X9. Which, if any, of the following apply to you?

Base: All respondents n= 1,136

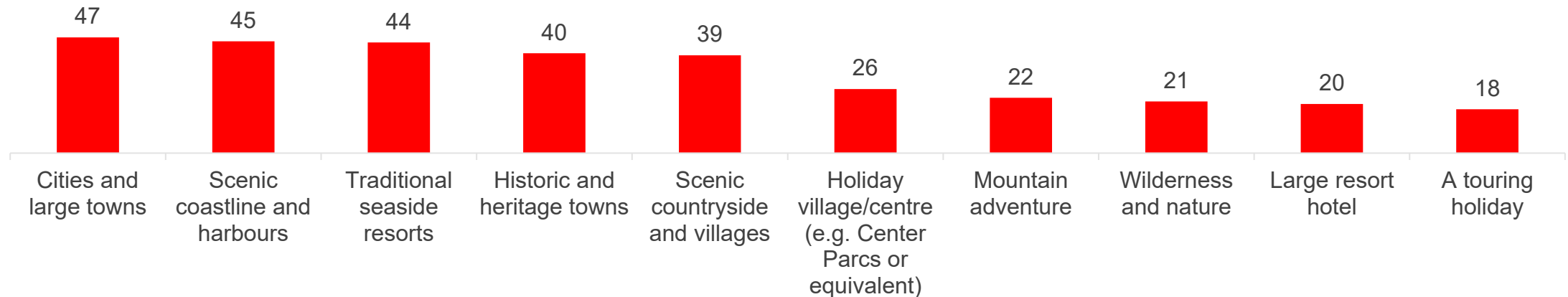
Trip Influences and Preferences



Destination types seriously considering for a UK overnight trip

- 'Cities and large towns', 'scenic coastline and harbours' and 'traditional seaside resorts' are the destination types where the domestic holiday market are most likely to be 'seriously considering' a UK holiday/short break in the next 12 months. 'Historic or heritage towns' and 'scenic countryside and villages' also generate serious consideration from around 2 in 5.

Figure 8. Destination types seriously considering a UK holiday/short break in next 12 months, Percentage, All respondents



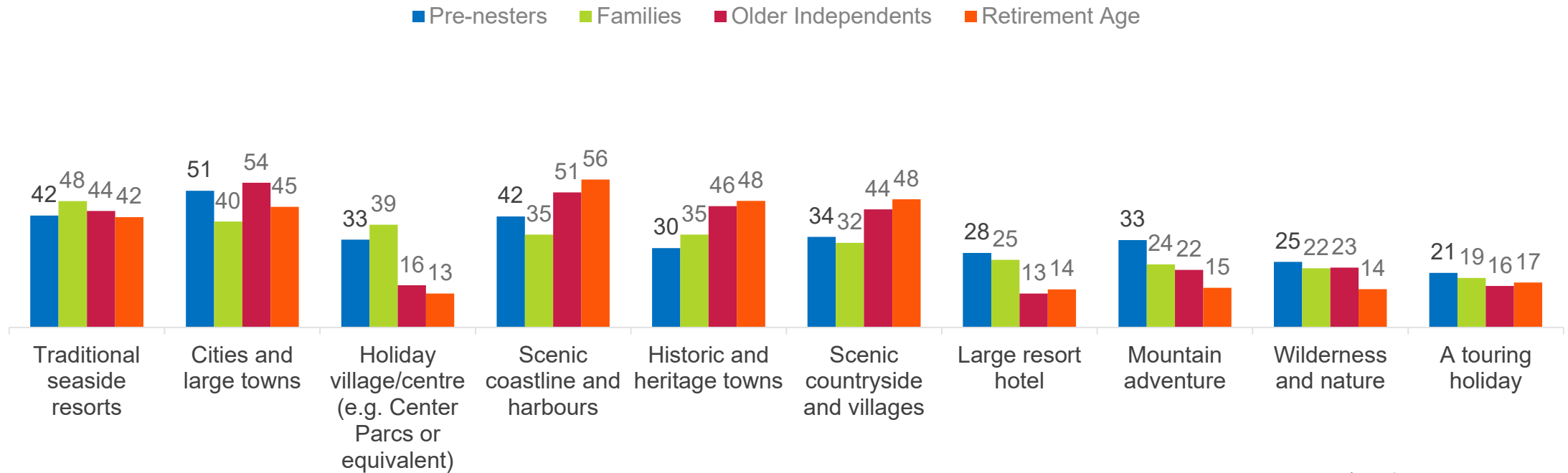
B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next 12 months?

Base: All respondents n=1,136

Destination types seriously considering – by life stage

- There is some variation in destination type preference by life stage. For pre-nesters and older independents, ‘cities and large towns’ is the leading destination type; for families, ‘traditional seaside resorts’ lead the way. Respondents of retirement age favour ‘scenic coastline and harbours’ more than other life stages. ‘Historic and heritage towns’ and ‘scenic coastline and harbours’ have higher appeal amongst older independents and retirees. Holiday villages/centres and large resort hotels are more likely to appeal to families and pre-nesters than to other life stage groups.
- Touring holidays are less popular among all life stages.

Figure 9. Destination types seriously considering a UK holiday/short break in next 12 months by life stage, Percentage, All respondents



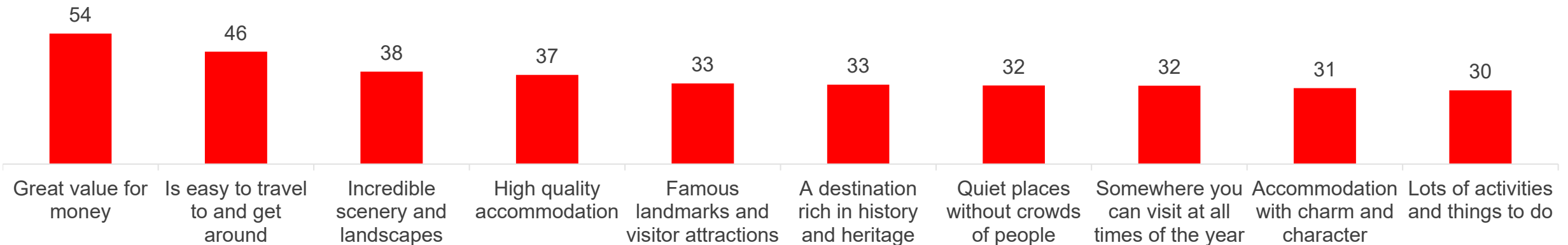
B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next 12 months?

Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222

Destination influences for a UK overnight trip

- 'Great value for money' is the leading destination influence for a UK holiday/short break, followed by 'is easy to get to and get around'. Beyond these practical factors, 'incredible scenery and landscapes' and 'high quality accommodation' are the next most important influences. 'Famous landmarks and visitor attractions' and 'a destination rich in history and heritage' are also influential.
- Notably, 'value for money' is important for all social grades but more of an influence for lower social grades DE. 59% of those in social grade DE cited 'Great value for money' as a destination influence, compared to 53% of C2 and 52% of C1 and AB each.

Figure 10. Destination influences for a UK holiday/short break, Percentage, Top 10, All respondents



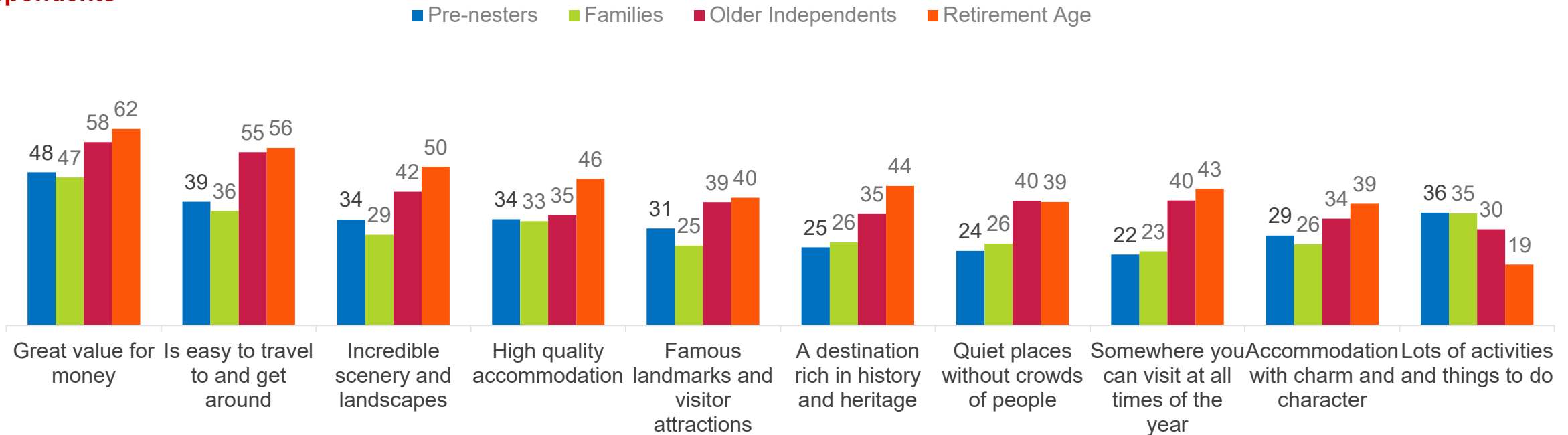
B2. Below are a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: All respondents n=1,136

Destination influences for a UK overnight trip – by life stage

- ‘Great value for money’ and ‘is easy to travel to and get around’ are the two leading destination influences for all life stages, but in particular for ‘older independents’ and ‘retirees’ who index highest on most of the leading influences. Pre-nesters and families are also highly influenced by ‘lots of activities and things to do’, while ‘incredible scenery and landscapes’ influence older independents and retirees more. Older life stages ‘older independents’ and ‘retirees’ also tend to favour ‘history and heritage’, ‘famous landmarks and visitor attractions’, ‘quiet places without crowds’, and ‘somewhere you can visit at all times of the year.’

Figure 11. Destination influences for a UK holiday/short break by life stage, Percentage, Top 10, All respondents



B2. Below are a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

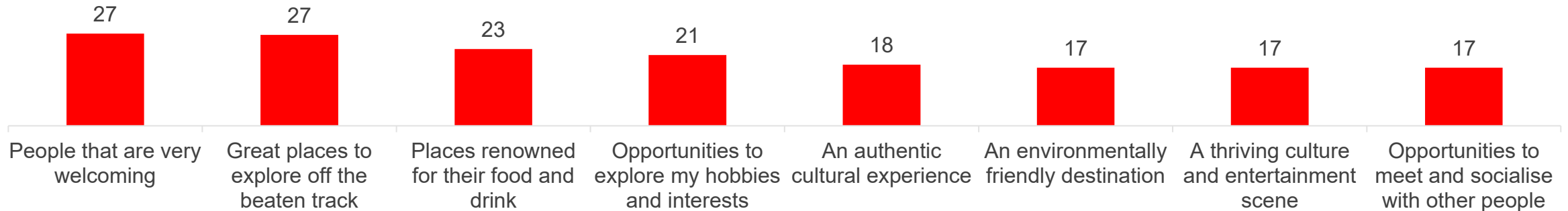
Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222



Destination influences for a UK overnight trip

- A range of other destination influences are also important, although 'an environmentally friendly destination', 'a thriving culture and entertainment scene' and 'opportunities to meet and socialise' are bottom of the list.

Figure 12. Destination influences for a UK holiday/short break, Percentage, Bottom 8, All respondents



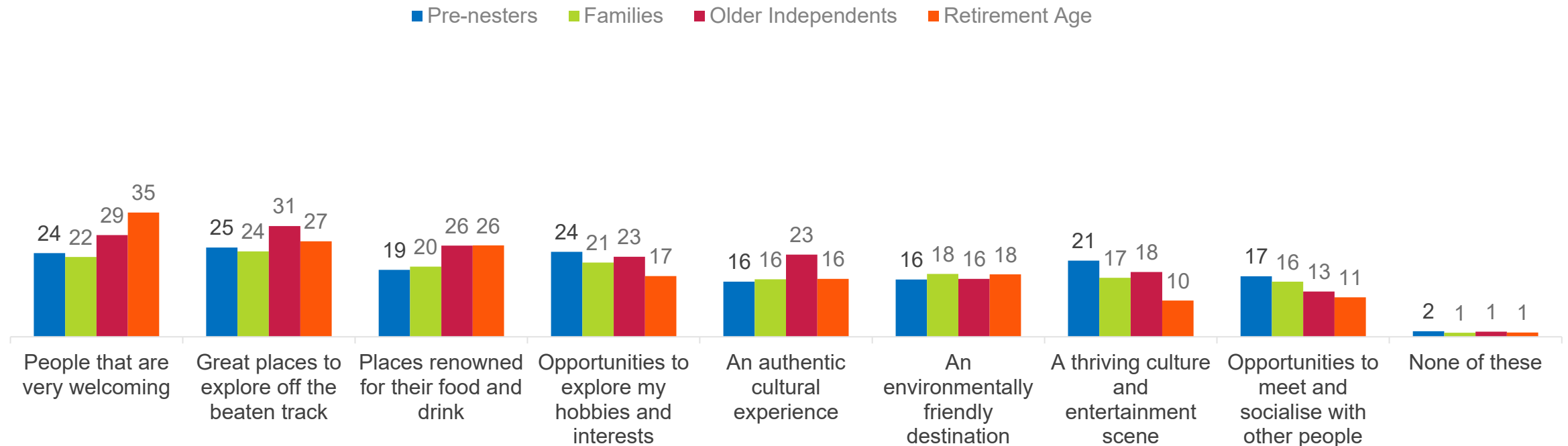
B2. Below are a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: All respondents n=1,136

Destination influences for a UK overnight trip – by life stage

- ‘Retirees’ and ‘older independents’ find a range of influences more important than other life stages, including ‘people that are very welcoming’ and ‘places renowned for their food and drink’.
- Some influences index higher for younger life stages, in particular ‘opportunities to explore my hobbies and interests’, ‘a thriving culture and entertainment scene’, and ‘opportunities to meet and socialise with other people’ – each highest amongst pre-nesters and lowest amongst retirees

Figure 13. Destination influences for a UK holiday/short break by life stage, Percentage, Bottom 8, All respondents



B2. Below are a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

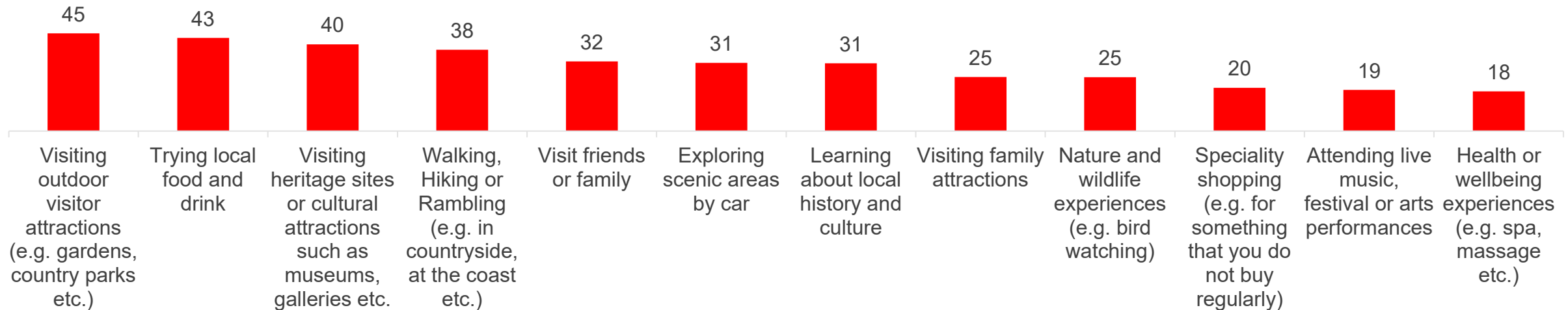
Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222



Experiences would most like to do on a UK holiday/short break

- In terms of experiences, 'visiting outdoor visitor attractions' is what the domestic holiday market would most like to do, followed by 'trying local food and drink' and 'visiting heritage sites or cultural attractions'. 'Walking, hiking or rambling' also makes the top four. Around 1 in 3 are also interested in 'visiting friends or relatives', 'exploring scenic areas by car' and 'local history and culture'.

Figure 14. Experiences would most like to do on a UK holiday/short break, Percentage, Top 12, All respondents



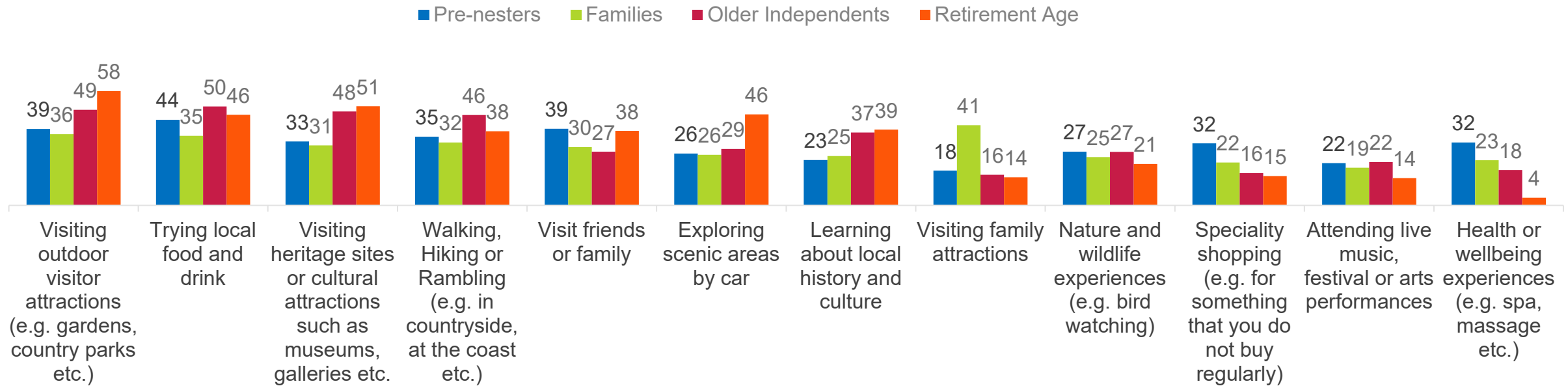
B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next 12 months?

Base: All respondents n=1,136

Experiences would most like to do – by life stage

- There are some differences in the leading preferred experiences by life stage. Overall preference for ‘visiting outdoor attractions’ is driven by ‘older independents’ and ‘retirees’, who are also most likely to want to visit ‘heritage sites’ and ‘learn about local history and culture’. Unsurprisingly, families are the most likely to be interested in ‘visiting family attractions’. Although of limited interest overall, ‘health or wellbeing experiences’ and ‘speciality shopping’ are of relatively high interest to ‘pre-nesters’. Retirees are the most likely to explore scenic areas by car, and are more likely than the other groups to be interested in ‘exploring scenic areas by car’.

Figure 15. Experiences would most like to do on a UK holiday/short break by life stage, Percentage, Top 12, All respondents



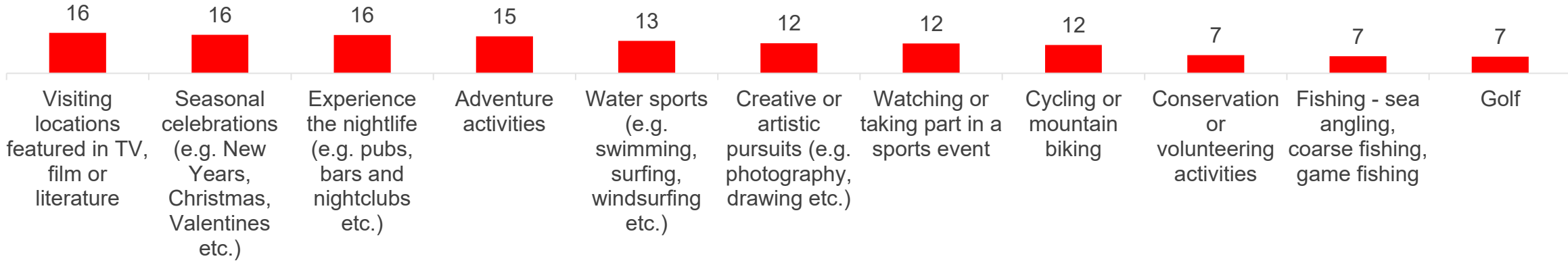
B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next 12 months?

Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222

Experiences would most like to do on a UK holiday/short break

- A range of other activities appeal to a more niche audience. For example, visiting locations featured in 'TV, film or literature', 'seasonal celebrations', and 'nightlife experiences' are likely to be undertaken by 16% of UK holiday takers.
- Activities such as 'golf', 'fishing' and 'conservation or volunteering' are least likely to be preferred experiences on a holiday or short break in the UK.

Figure 16. Experiences would most like to do on a UK holiday/short break, Percentage, Bottom 11, All respondents



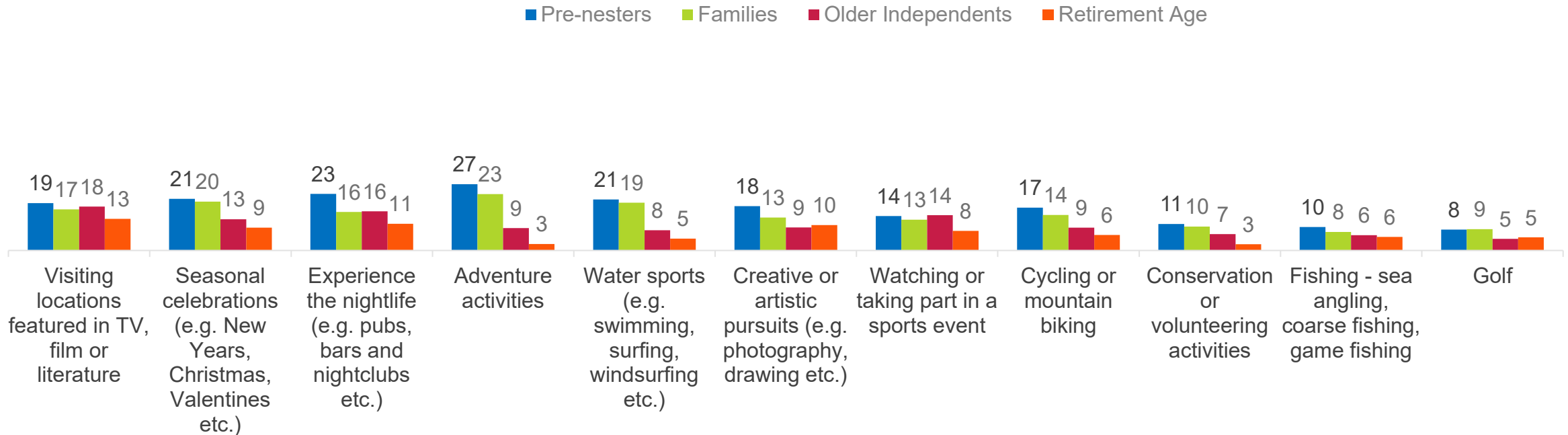
B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next 12 months?
 Base: All respondents n=1,136



Experiences would most like to do – by life stage

- Amongst niche activities, pre-nesters and families index relatively highly on ‘active experiences’ such as ‘adventure activities’, ‘water sports’, and ‘cycling or mountain biking’. ‘Pre-nesters’ stand-out in being the most likely to be interested in ‘experiencing the nightlife’ and ‘creative or artistic pursuits’.

Figure 17. Experiences would most like to do on a UK holiday/short break by life stage, Percentage, Bottom 11, All respondents



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next 12 months?

Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222



Destination Relationships and Previous Visits

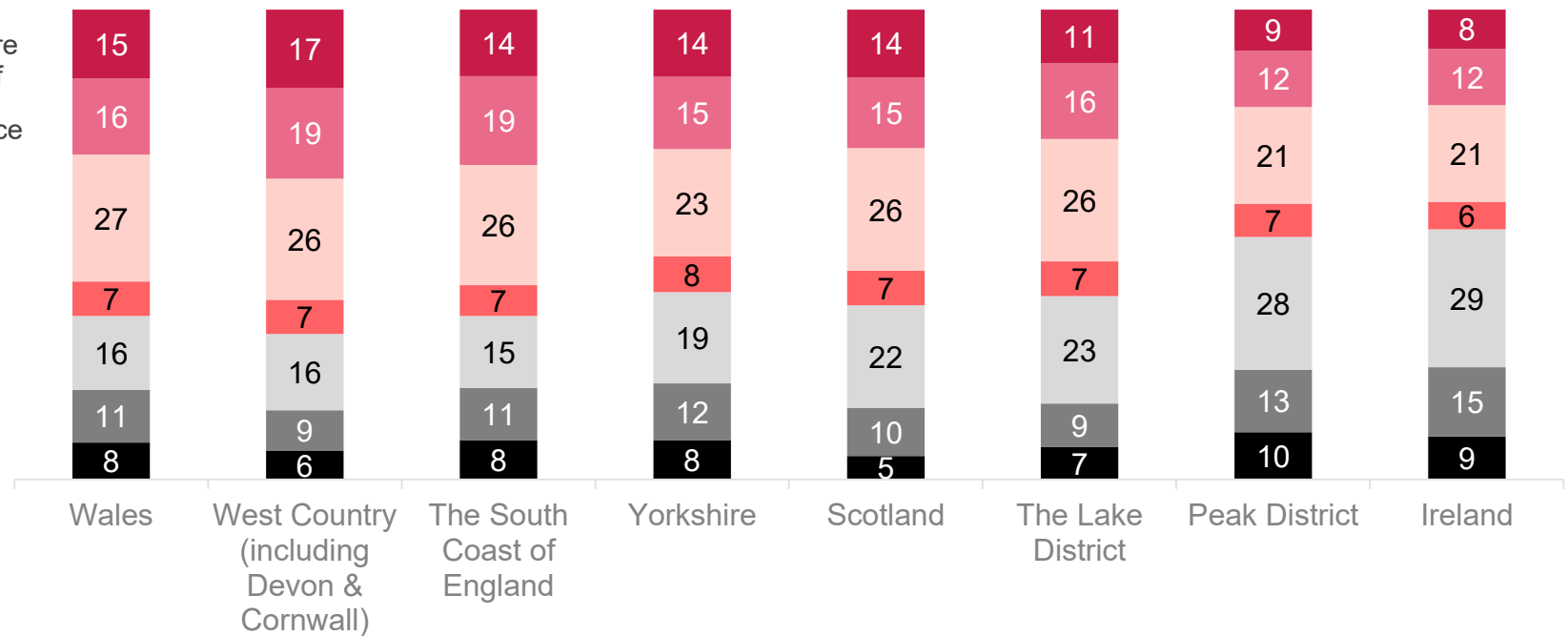


Loyalty with Wales and other destinations

- The West Country and The South Coast of England are the areas of the UK most likely to generate regular holidays or short breaks, around a third often/sometimes going there. Wales is the third most likely to do so.
- 27% have never taken a holiday or short break in Wales previously but most of these (16%) would like to visit. Only a minority (18%) would not consider visiting Wales in the future.

Figure 18. Relationship with each destination, Percentage, All respondents

- I often take short breaks or holidays there and intend to do so again within the next year
- I sometimes take short breaks or holidays there and intend to do so again in the next couple of years
- I have taken a short break or holiday there once or twice before and might do so again
- I have taken a short break or holiday there before, but am unlikely to do so again
- I have never been on a holiday or short break there but would like to
- I have never taken a short break or holiday there before and am not likely to in the future
- I don't know



C1. Which of the following statements best applies to you when it comes to visiting these destinations?

Base: All respondents n=1,136

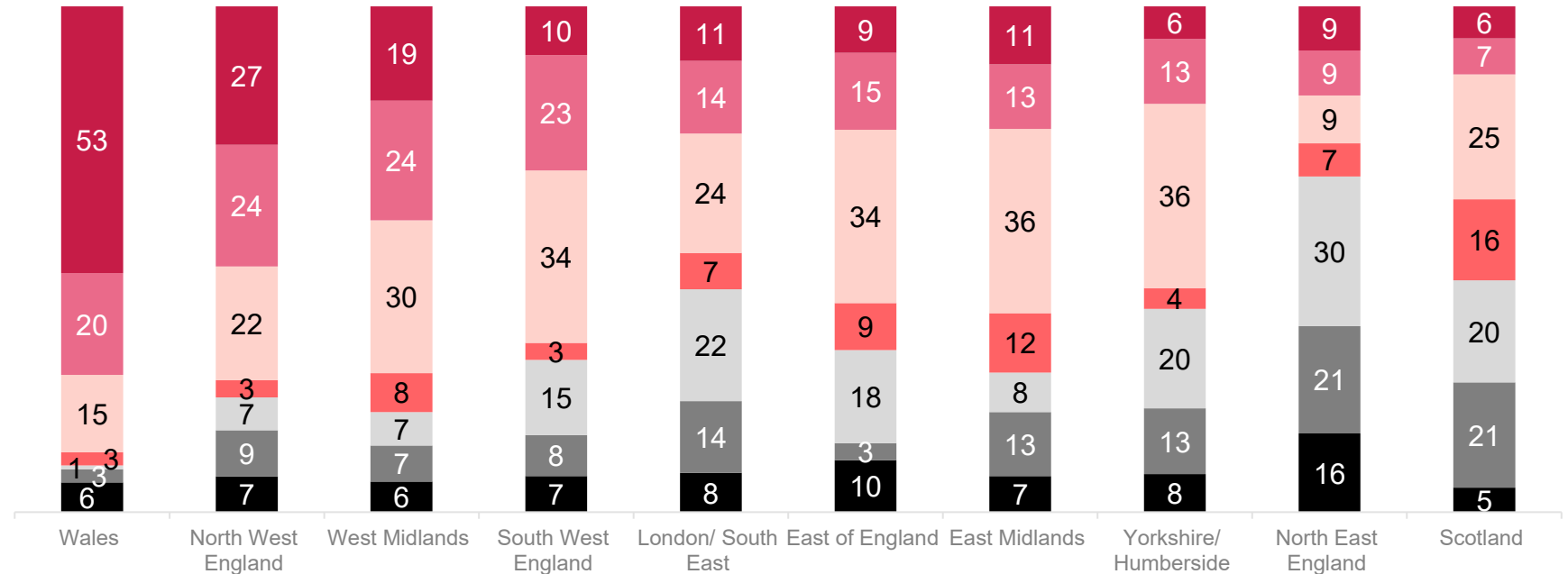


Loyalty with Wales by region of residence

- Wales residents exhibit the highest 'loyalty' to Wales in terms of trips, half of them 'often taking short breaks or holidays there and intending to do so in the next year'. Proximity to Wales is a strong driver of regular visits - behind Wales, neighbouring regions the North West of England, the West Midlands and the South West of England exhibit the strongest 'loyalty' to Wales.

Figure 19. Relationship with Wales by region of residence, Percentage, All respondents

- I often take short breaks or holidays there and intend to do so again within the next year
- I sometimes take short breaks or holidays there and intend to do so again in the next couple of years
- I have taken a short break or holiday there once or twice before and might do so again
- I have taken a short break or holiday there before, but am unlikely to do so again
- I have never been on a holiday or short break there but would like to
- I have never taken a short break or holiday there before and am not likely to in the future
- I don't know



C1. Which of the following statements best applies to you when it comes to visiting these destinations?

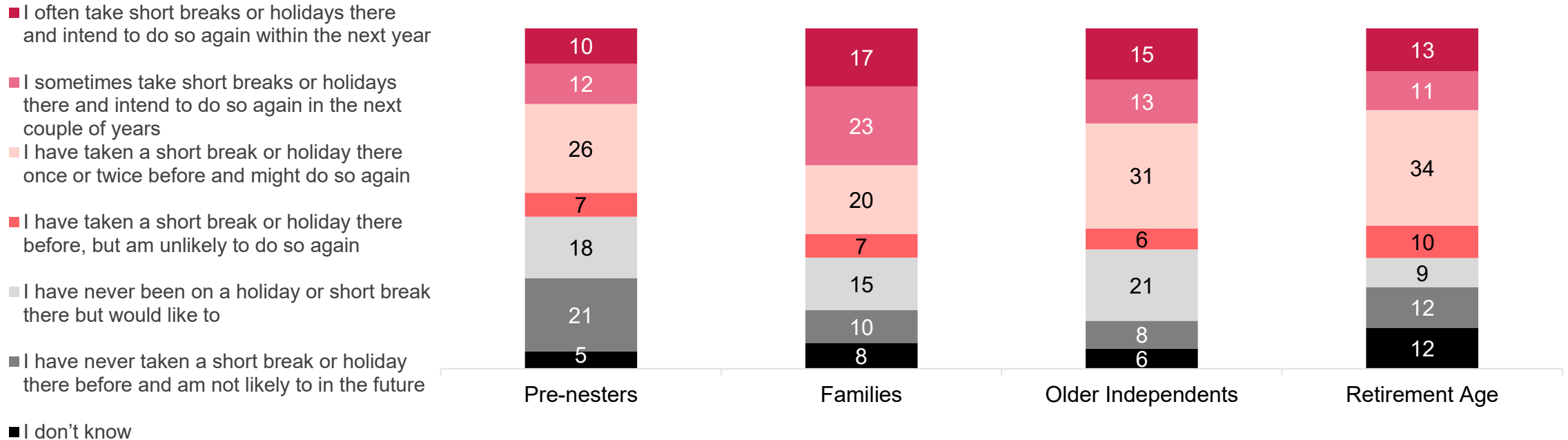
Base: All respondents. Wales n=195; North West n=109; West Mids n=99; South West England n=79; London/South East n=259; East Anglia =98; East Mids n=78; Yorkshire/Humberside n=79; North East England n=40; Scotland n=80



Loyalty with Wales by life stage

- Families report the strongest relationship with Wales as a holiday or short break destination – 40% taking holidays/short breaks there often or sometimes and intending to do so again in the next couple of years or sooner.
- Nearly 2 in 5 (39%) pre-nesters have never visited Wales, and just under half of these (18%) would consider doing so. ‘Older independents’ and ‘retirees’ are the age groups most likely to have visited Wales once or twice, with a desire of doing so again.

Figure 20. Relationship with Wales by life stage, Percentage, All respondents



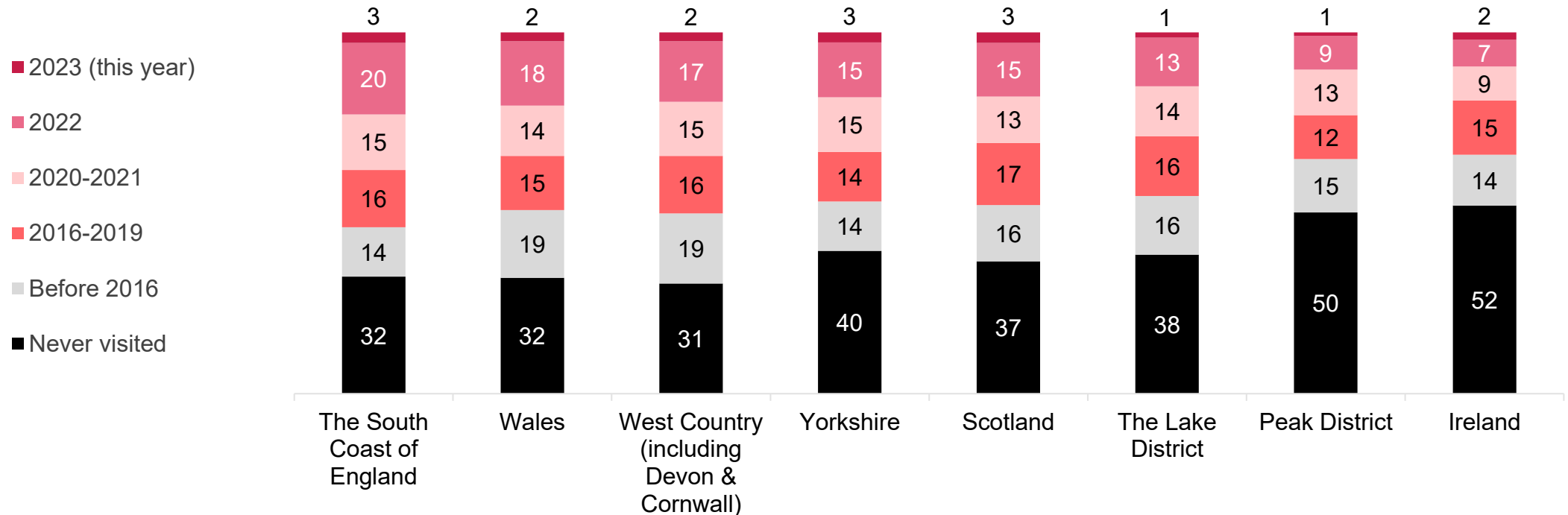
C1. Which of the following statements best applies to you when it comes to visiting these destinations?

Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222

Previous visits to each destination

- 18% of the UK holiday market stated they visited Wales for an overnight short break or holiday in 2022, behind only 'The South Coast of England' (20%) and marginally ahead of the 'West Country' (17%).

Figure 21. Previous visits to each destination, Percentage, All respondents



C2. When did you last visit these places for a holiday or short break?

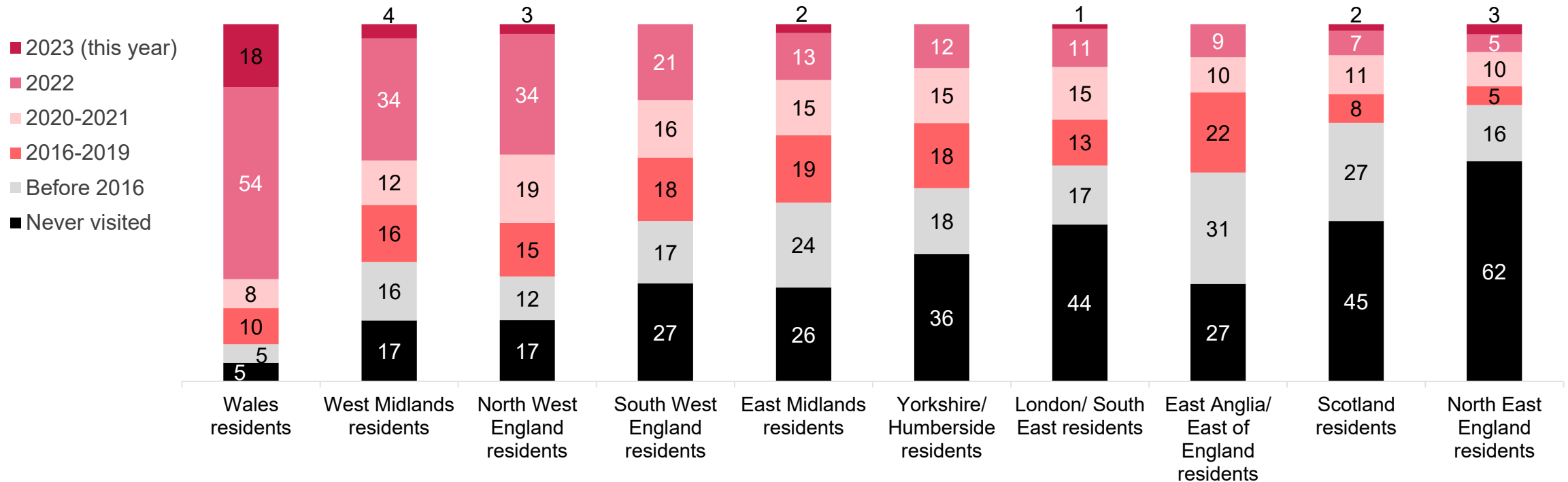
Base: All respondents n=1,136



Previous visits to Wales by region of residence

- Wales residents are most likely to have last visited Wales for a holiday/short break between 2022 and January 2023, followed by the geographically close regions of North West of England and West Midlands.
- Residents of London/South East England, Scotland and North East England are the most likely to have 'never visited' Wales for a holiday/short break.

Figure 22. Previous visits to WALES by region of residence, Percentage, All respondents



C2. When did you last visit these places for a holiday or short break?

Base: All respondents. Wales n=187; North West n=89; West Mids n=86; Yorkshire n=54; London/South East n=164; South West England n=62; Scotland n=48; East Mids n=61; North East England n=21*; East of England n=77

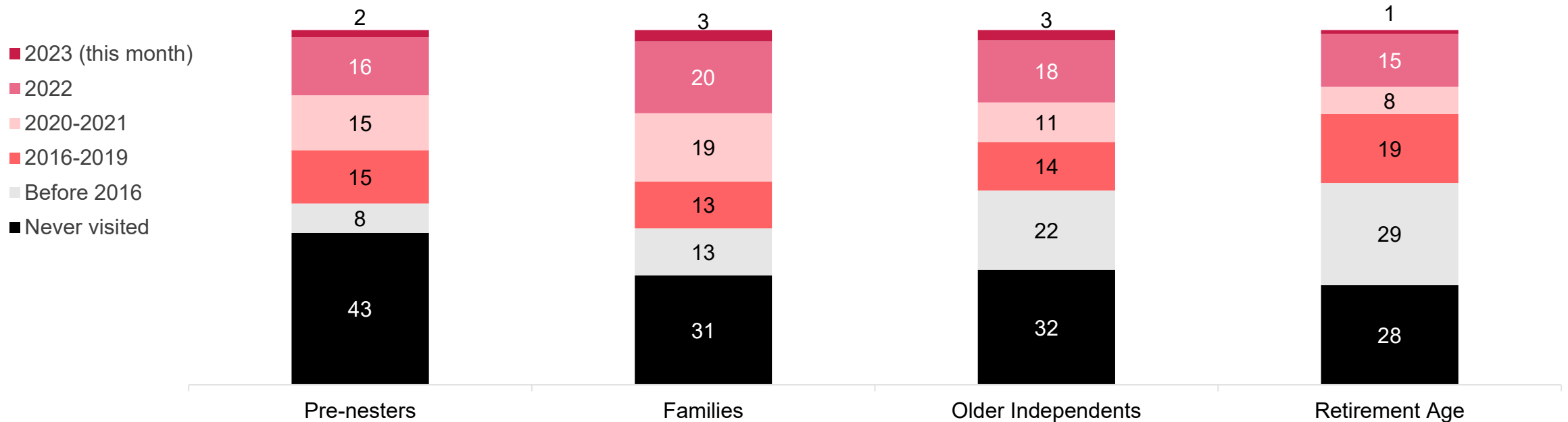
*Caution low base sizes



Previous visits to Wales by life stage

- Aligned with general loyalty to Wales as a destination, families are the life stage most likely to have taken a trip in Wales since 2020, more than 2 in 5 having done so. Relative to families, 'retirees' and 'older independents' show a lower level of recent visitation but higher visitation at some point in their lives, which is in line with lower recent domestic holidays, linked to Covid-19. This does suggest there may be a need to 'reactivate' these life stages.

Figure 23. Previous visits to WALES by LIFE STAGE, Percentage, All respondents



C2. When did you last visit these places for a holiday or short break?
 Base: Pre-nesters n=122; Families n=326; Older Independents n=237; Retirees n=180

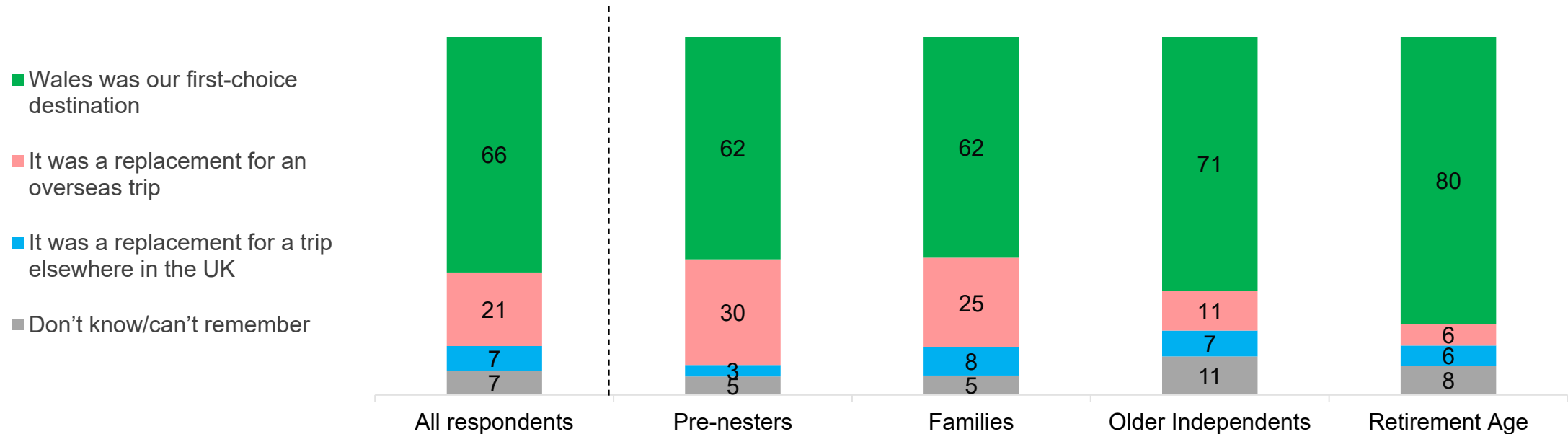
Wales Visitation in 2022



Wales as a first choice destination in 2022

- Two thirds of those who took a trip in Wales in 2022 stated that ‘Wales was our first choice destination’, while 21% stated that Wales ‘was a replacement for an overseas trip’.
- Notably, pre-nesters and families were less likely than ‘older independents’ and ‘retirees’ to state Wales was their first choice, and more likely to say it was ‘a replacement for an overseas trip’.

Figure 24. Wales as a first-choice destination, Percentage, All 2022 Wales trip takers and by life stage



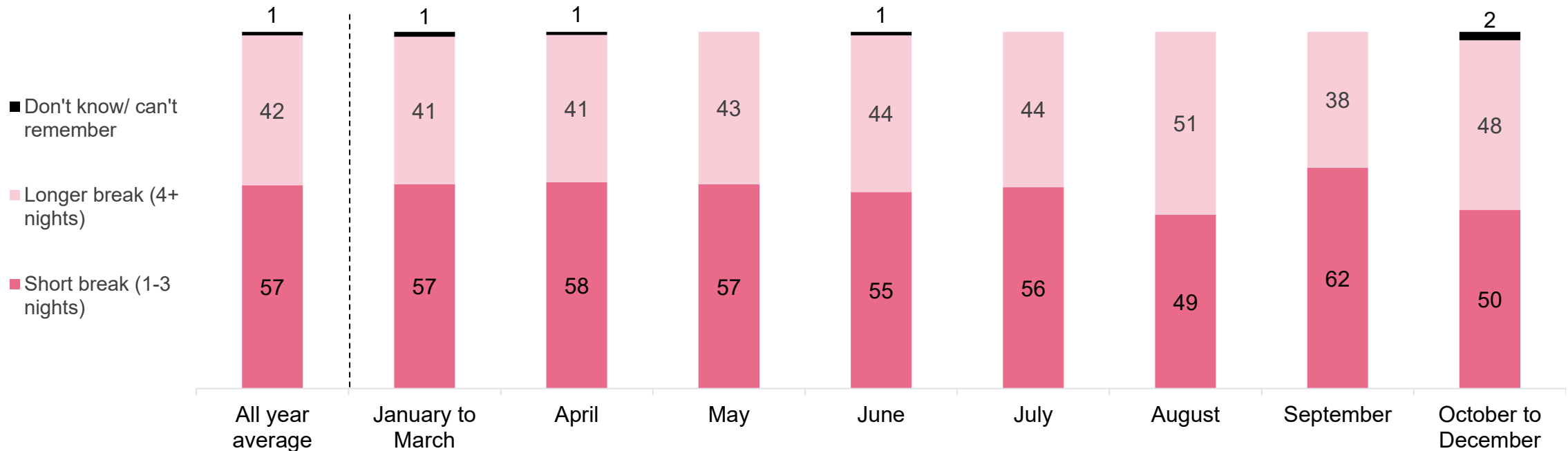
D4. Which, if any, of these statements best apply to your trip in Wales in <INSERT MONTH>?
 Base: All respondents n=1,136; Pre-nesters n=86; Families n=267; Older Independents n=106; Retirees n=57



Number of nights in Wales by month

- Across the whole year, the majority (57%) of overnight trips to Wales in 2022 were short breaks of 1-3 nights, consistent for each month of the year with the exception of August, where trips were marginally more likely to be longer breaks.

Figure 25. Number of nights stayed in a Wales trip in 2022, Percentage, All 2022 Wales trip takers



D10. On this trip to Wales in <INSERT MONTH>, how many nights did you stay away for?

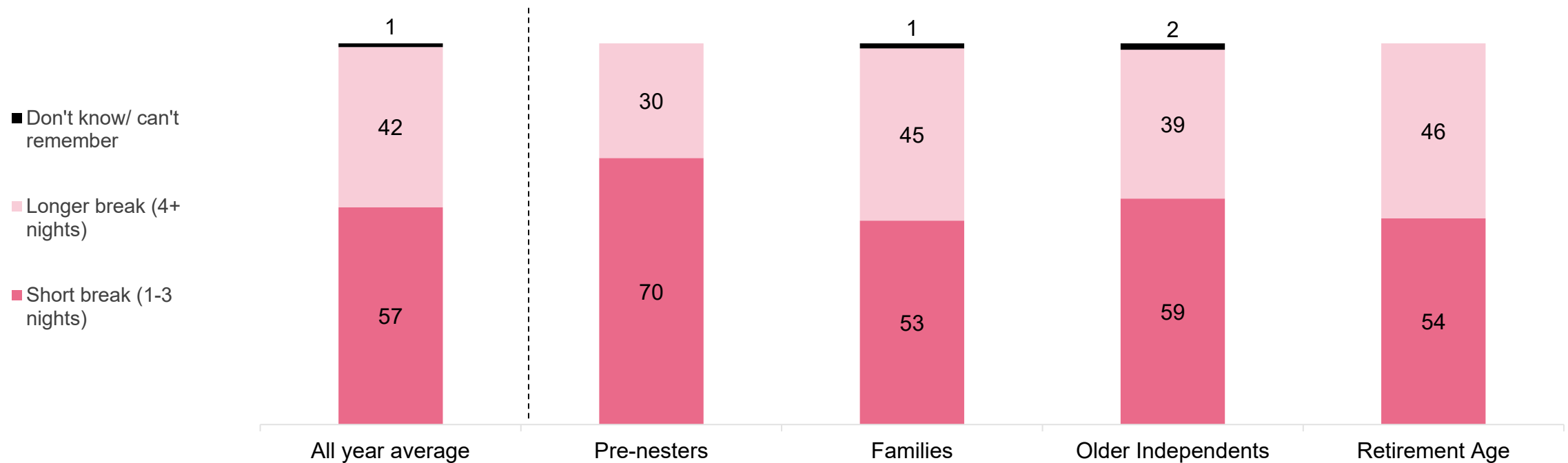
Base: All 2022 Wales trip takers n=516. January to March n=146; April n=88; May n=94; June n=106; July n=100; August n=102; September n=80; October to December n=95



Number of nights in Wales by life stage

- Pre-nesters were more likely than other life stages to take a short break of 1-3 nights – 70% compared to an average of 57%.

Figure 26. Number of nights stayed in a Wales trip in 2022, Percentage, All 2022 Wales trip takers



D10. On this trip to Wales in <INSERT MONTH>, how many nights did you stay away for?

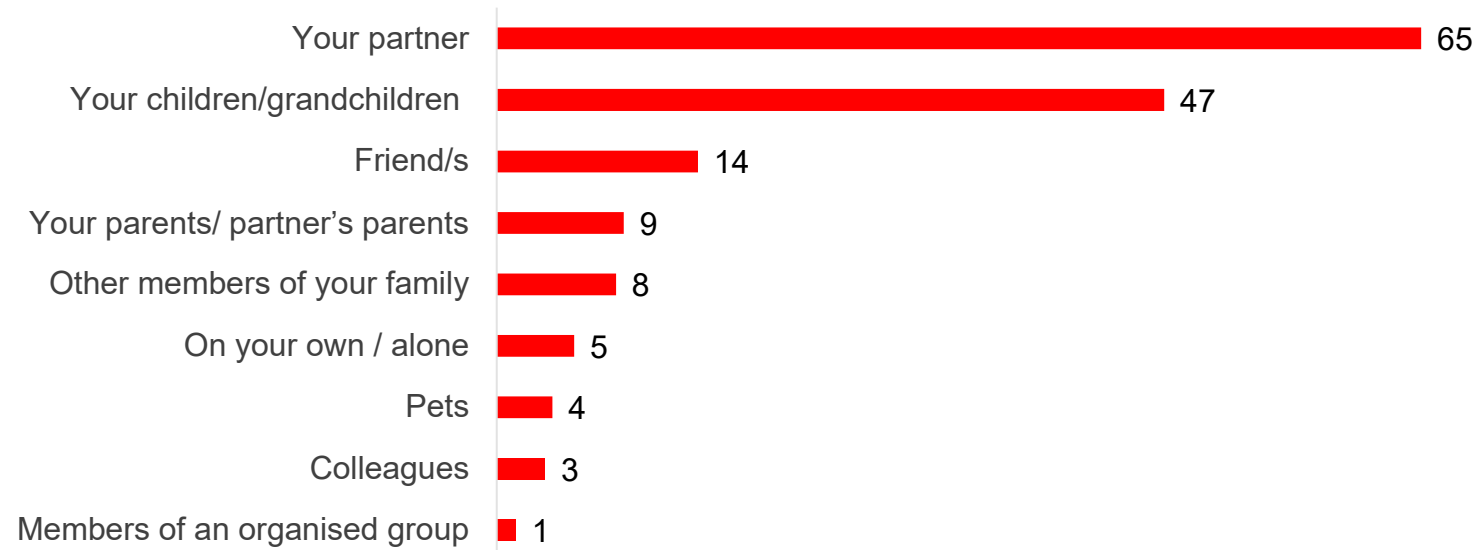
Base: All 2022 Wales trip takers n=516. Pre-nesters n=86; Families n=267; Older Independents n=106; Retirees n=57



Party composition of Wales 2022 trip-takers

- Overnight visitors to Wales were most likely to have visited with their partner (65%), followed by 'children/grandchildren' (47%), the latter particularly in the summer months (59% in August, 58% in July and 57% in June)
- Unsurprisingly, the vast majority of families took their overnight Wales trip with children or grandchildren, with 23% of retirees also doing so. 1 in 4 (27%) pre-nesters took their Wales trip with friends, and nearly 1 in 5 (19%) pre-nesters went to Wales with their parents or their partner's parents. Pre-nesters and older independents were the most likely to have visited Wales on their own in 2022.

Figure 27. Visitor party make-up for Wales trip in 2022, Percentage, All 2022 Wales trip takers



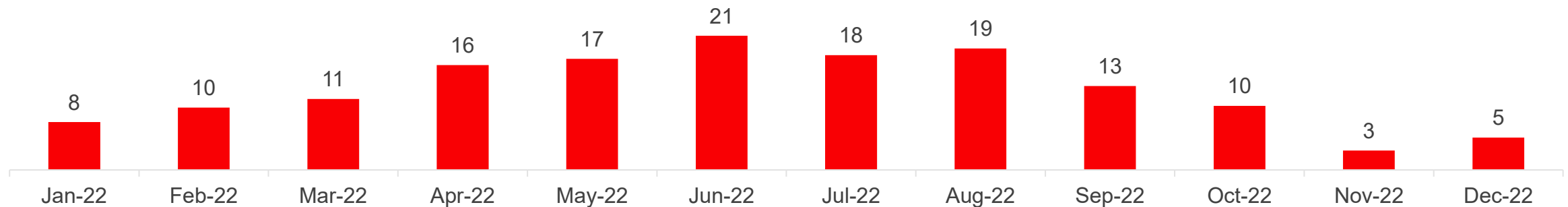
D9. With whom did you spend your short break or holiday in Wales in <INSERT MONTH>?

Base: All 2022 Wales trip takers n=516

Month of trips in Wales in 2022

- Overnight visits to Wales were at their highest in the peak summer months between June and August, dropping slightly in the 'shoulder months' of April, May and September - lower between January and March, and October to December.

Figure 28. Months taken a trip to Wales in 2022, Percentage, All 2022 Wales trip takers



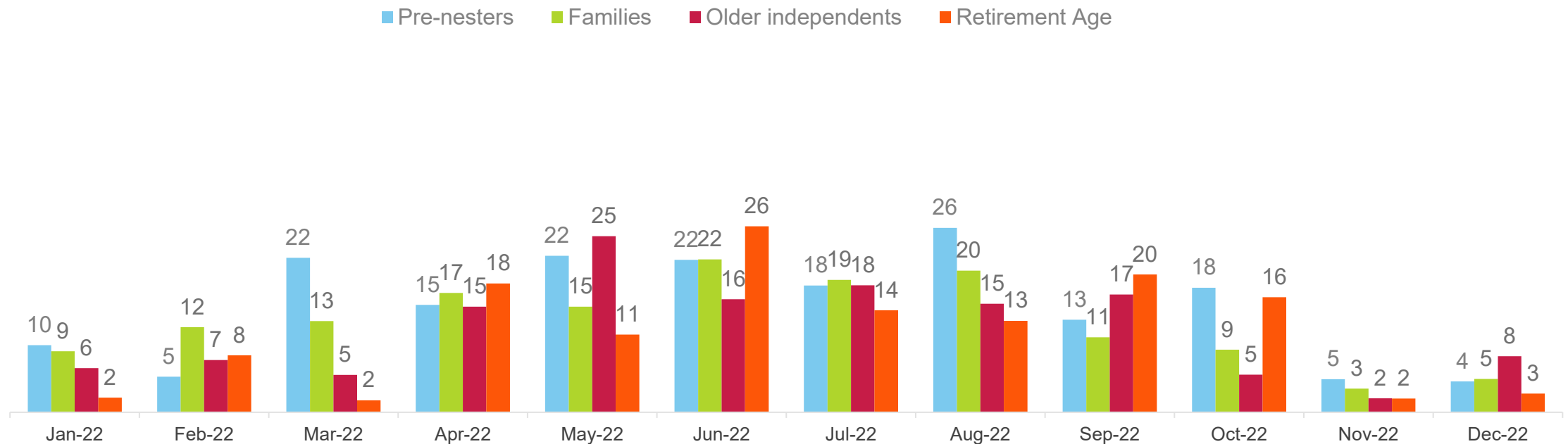
D3. And in which months of the year did you visit Wales for a short-break or holiday in 2022?

Base: All 2022 Wales trip takers n=516

Months taken a trip to Wales in 2022 – by life stage

- There was some variation in month of visit to Wales by life stage. Pre-nesters reported a relatively even spread of visits between March and October, highest in August. Family visits were highest in the summer months between June and August. Older independents – with the exception of very high visits in May – stayed overnight in Wales relatively evenly between April and September. Retirees indexed high in April, June, September and October, but were more likely to avoid the peak summer months of July and August.

Figure 29. Months taken a trip to Wales in 2022 by life stage, Percentage, All 2022 Wales trip takers



D3. And in which months of the year did you visit Wales for a short-break or holiday in 2022?

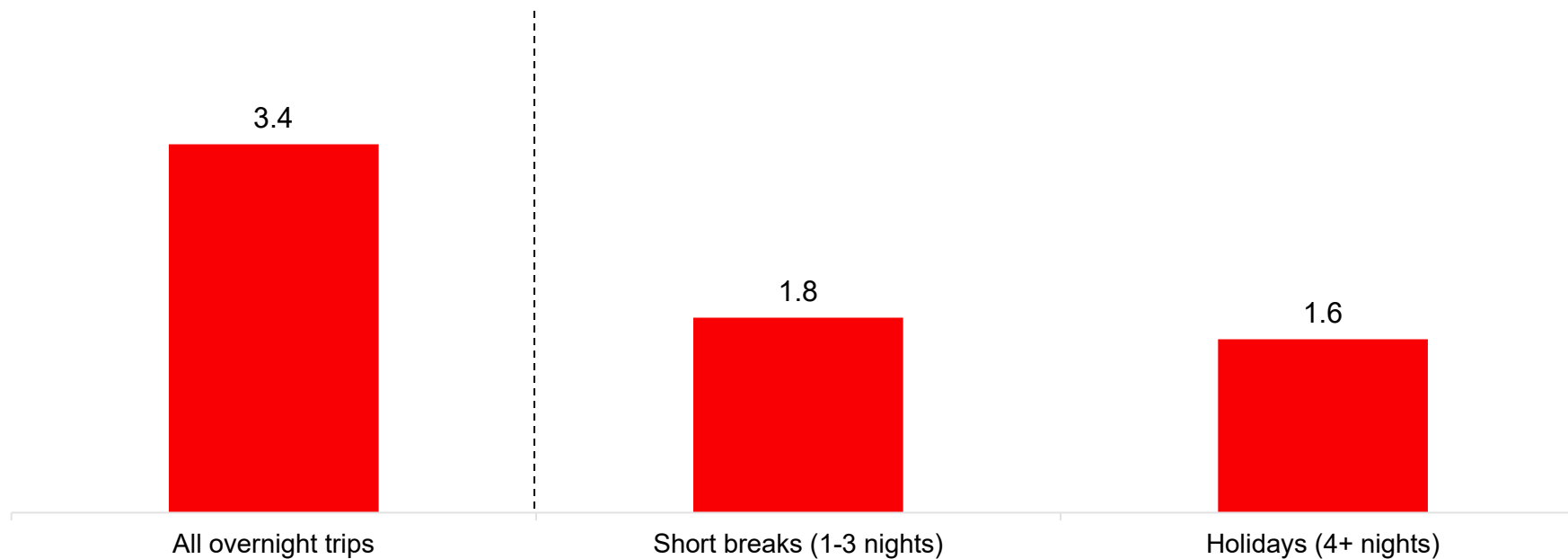
Base: All 2022 Wales trip takers. Pre-nesters n=86; Families n=267; Older Independents n=106; Retirees n=57



Number of trips in Wales in 2022

- On average, visitors to Wales took 3.4 overnight trips in 2022, split relatively equally between short breaks and longer trips of 4+ nights.

Figure 30. Average number of Wales trips taken in 2022, All 2022 Wales trip takers

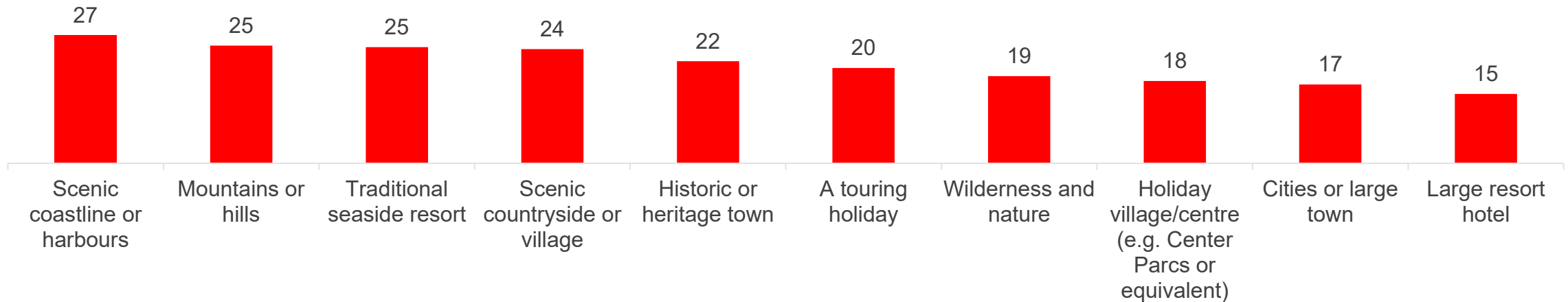


D2. How many holidays or short breaks did you take in Wales in 2022?
Base: All 2022 Wales trip takers n=516

Destination types to Wales in 2022

- Overnight visitors to Wales stayed in a range of different destination types in 2022. Just over a quarter went to a 'scenic coastline or harbour' destination, with 1 in 4 staying in 'mountains or hills' or a 'traditional seaside resort'. Just under 1 in 4 went to a 'scenic countryside or village' destination and around 1 in 5 went to a 'historic or heritage town' or on 'a touring holiday'.
- Respondents that visited Wales were least likely to do so to visit a 'large resort hotel' or a 'city or large town'.

Figure 31. Destination types during this trip in Wales in 2022, Percentage, All 2022 Wales trip takers

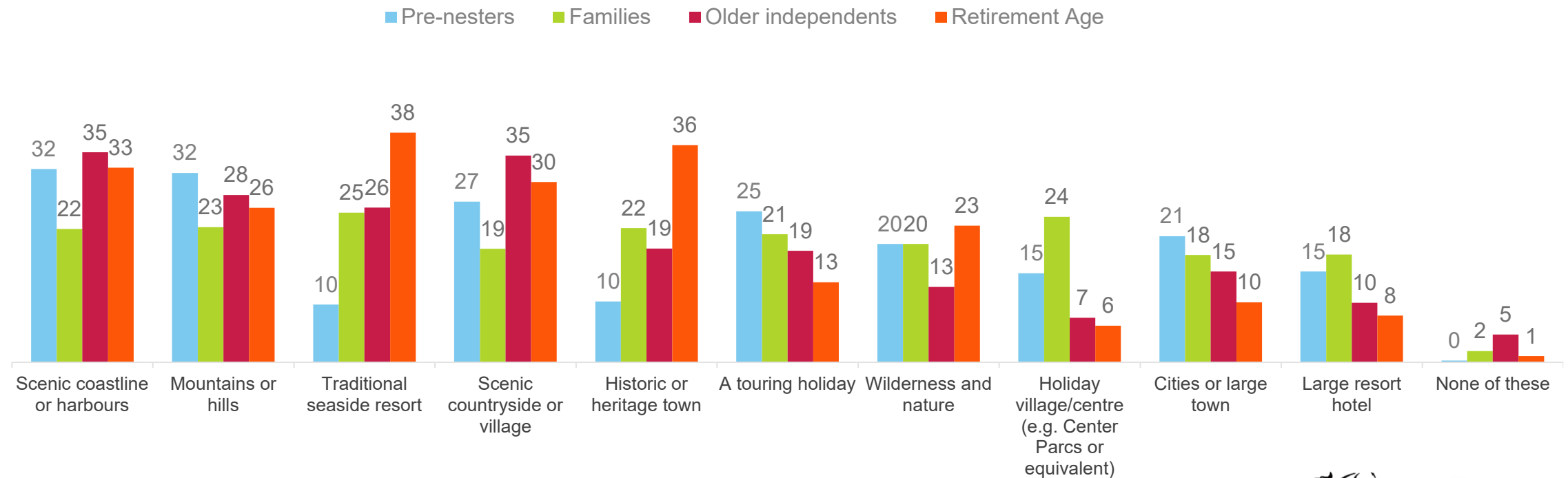


D5. Which of the following best describes the main type/s of destination you stayed in during this trip in Wales?
Base: All 2022 Wales trip takers n=516

Destination types to Wales in 2022 – by life stage

- Visitors to Wales of different life stages stayed in a range of different destination types.
- Pre-nesters were more likely to stay in ‘mountains or hills’, go on ‘a touring holiday’, or stay in a ‘city or large town’ than other groups. Families indexed high on ‘holiday villages/centres’ and ‘large resort hotels’ compared to other groups.
- Reflecting their general preference, ‘older independents’ and ‘retirees’ index highest for ‘scenic countryside of villages’, with retirees especially high in visits to ‘historic or heritage towns’ and ‘traditional seaside resorts’.

Figure 32. Destination types during this trip in Wales in 2022 by life stage, Percentage, All 2022 Wales trip takers



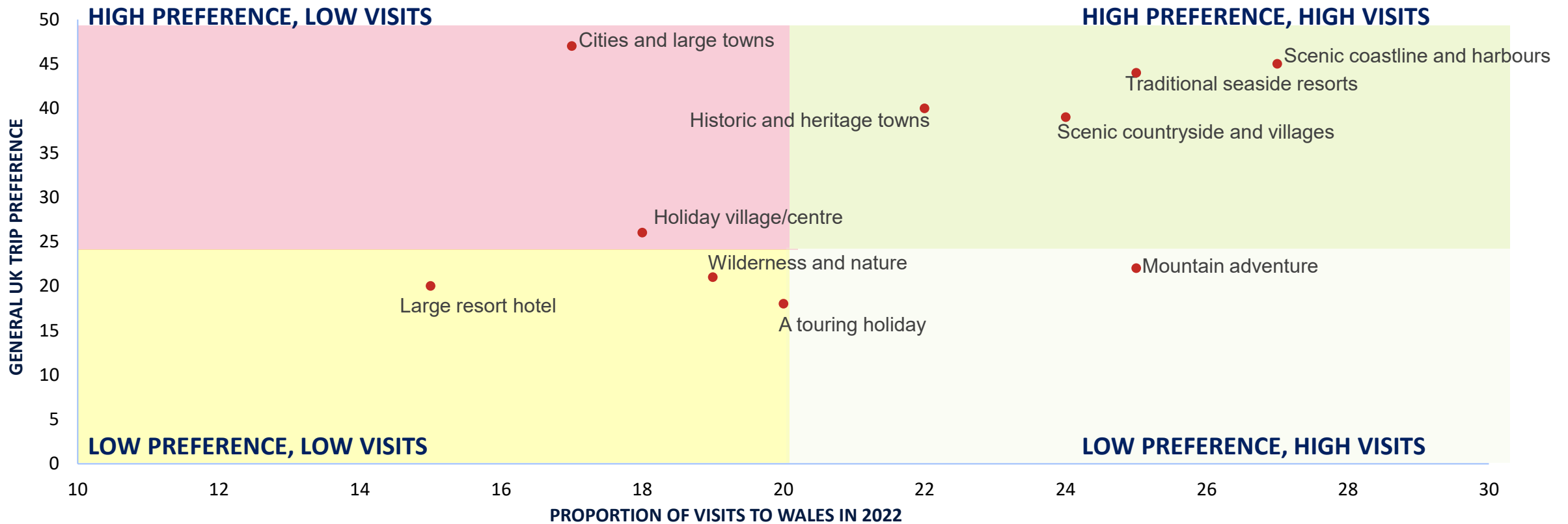
D5. Which of the following best describes the main type/s of destination you stayed in during this trip in Wales?
 Base: All 2022 Wales trip takers. Pre-nesters n=86; Families n=267; Older Independents n=106; Retirees n=57



UK destination type preferences compared to Wales visits in 2022

- Relative to destination preference, Wales had high visits in 2022 to 'scenic coastlines and harbours', 'traditional seaside resorts' and 'scenic countryside and villages'. It had relatively low visits to urban destinations such as 'cities and large towns' and 'historic and heritage towns', compared to consumer preferences to visit these destination types in 2022.

Figure 33. Wales destination type visits in 2022 against UK destination type preference, Percentage.

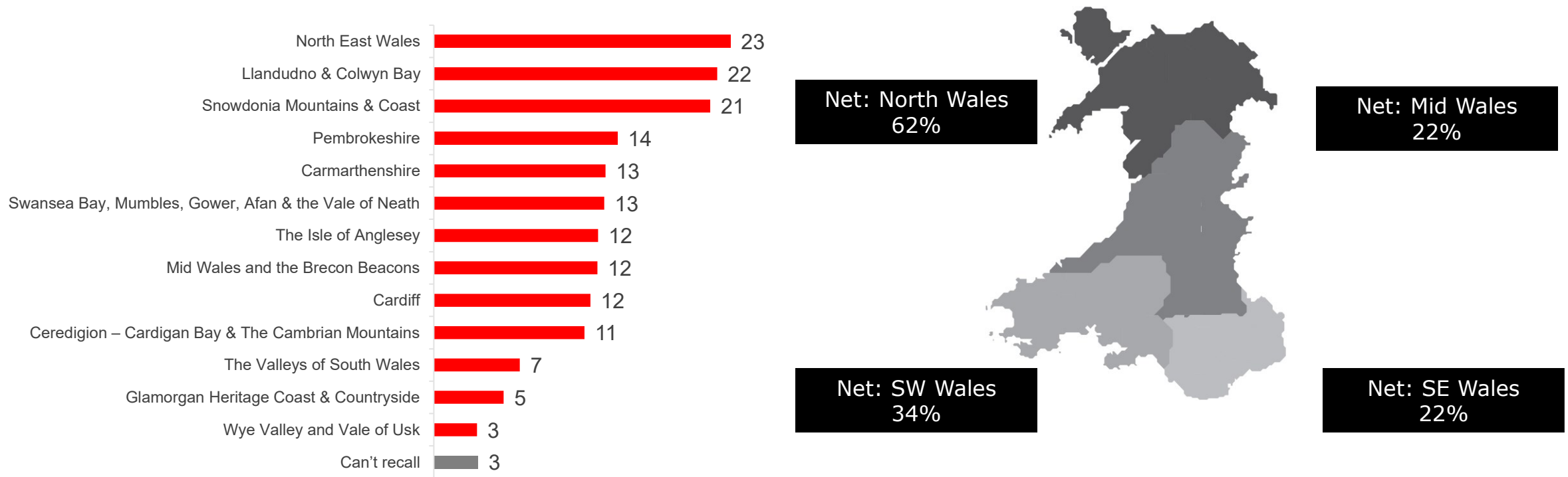


B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next 12 months? D5. Which of the following best describes the main type/s of destination you stayed in during this trip in Wales? Base: All respondents n=1,136

Destinations visited in Wales in 2022

- The three destinations in North Wales were the most visited parts of Wales for a holiday/short break in 2022.
- North Wales was visited by the majority of Wales overnight visitors at 62%, and was the most visited of the Welsh regions for all life stages.

Figure 34. Wales destinations visited on trip in 2022, Percentage, All 2022 Wales trip takers



D6. Where in Wales did you stay overnight on this trip?

Base: All 2022 Wales trip takers n=516

North Wales = North East Wales, Llandudno & Colwyn Bay, Snowdonia Mountains & Coast, The Isle of Anglesey; Mid

Wales = Mid Wales and the Brecon Beacons and Ceredigion; SW Wales = Pembrokeshire, Carmarthenshire and Swansea

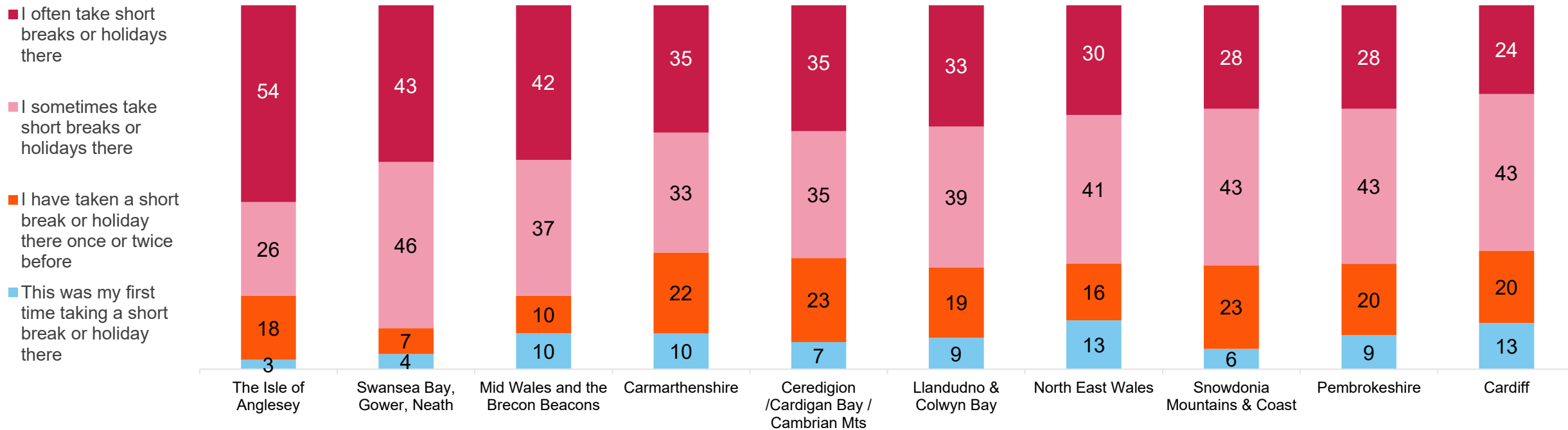
Bay; SE Wales = Cardiff, The Valleys of South Wales, Glamorgan Heritage Coast and Wye Valley



Destination regions in Wales in 2022

- Anglesey generated the highest proportion of visitors that 'often take holidays or short breaks there', with 'the Glamorgan Heritage Coast & Countryside', 'North East Wales' and 'Cardiff' attracting the highest proportion of first-timers

Figure 35. Relationship with individual destinations within Wales, Percentage, All 2022 Wales trip takers



D7. Which of the following statements best applies to you and your holidays and short breaks to these destinations in Wales? Base: All 2022 Wales trip takers. The Isle of Anglesey n=61; Llandudno & Colwyn Bay n=104; North East Wales n=98; Snowdonia Mountains & Coast n=108; Mid Wales and the Brecon Beacons n=71; Ceredigion n=69; Pembrokeshire n=82; Carmarthenshire n=67; Swansea Bay, Mumbles, Gower, Afan & the Vale of Neath n=66; Cardiff n=70; *Destinations with low base sizes are not shown



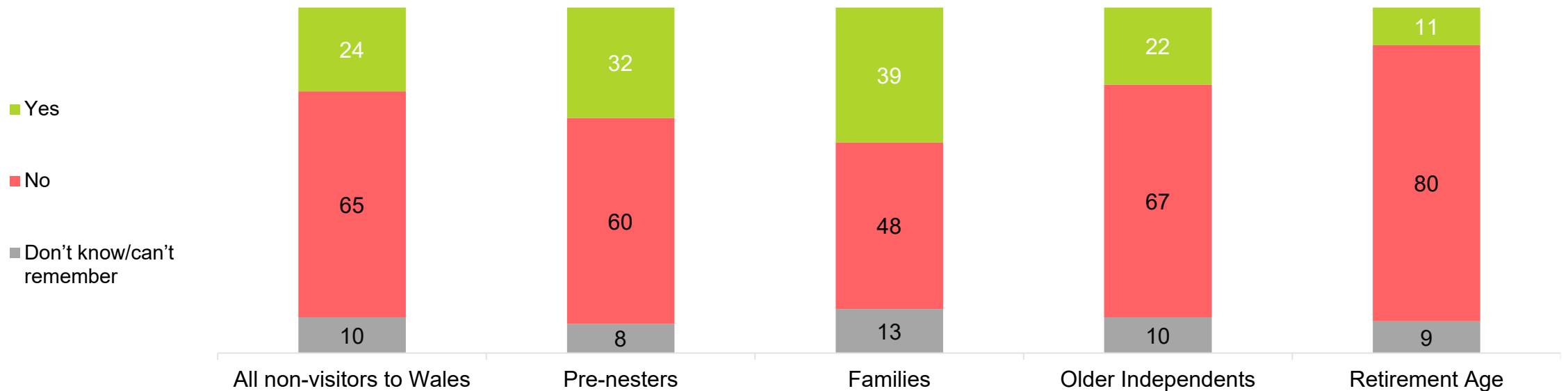
Non visitors to Wales in 2022



Destination consideration amongst non-visitors

- Of those that didn't visit Wales for a holiday or short break in 2022, 1 in 4 *did* consider doing so at some stage. Two thirds did not consider Wales at any stage. 'Pre-nester' and 'family' life stage non-visitors were the most likely to be considering Wales at some stage – 'retirees' and 'older independents' least likely.

Figure 36. Whether considered a Wales trip in 2022, Percentage, All respondents not taken a Wales trip in 2022 and by life stage



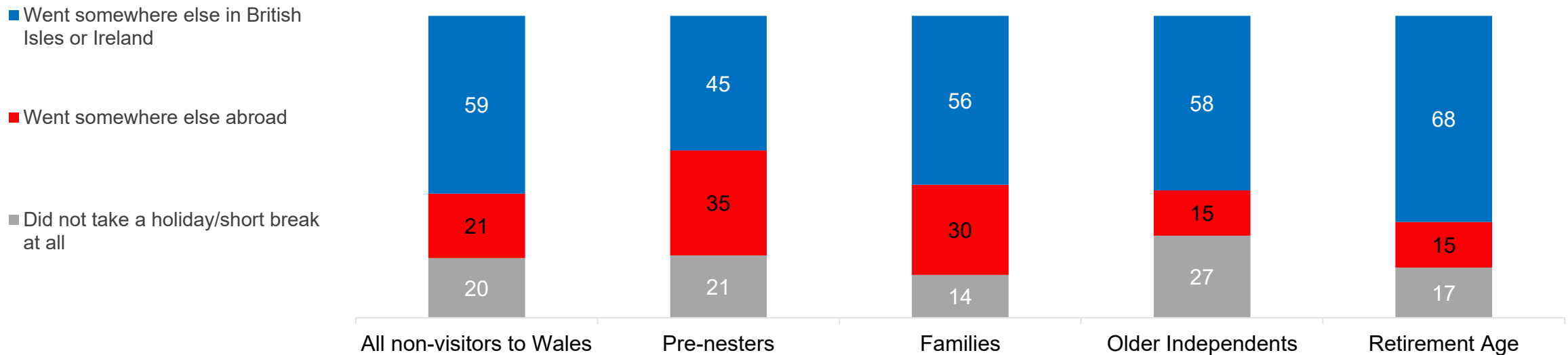
E1. You indicated that you did not take a holiday or short break in Wales in 2022. Were you considering a trip in Wales in 2022 at any stage? Base: All respondents not taken a Wales trip in 2022 n=620 Pre-nesters n=100; Families n=149; Older Independents n=206; Retirees n=165



Destination consideration amongst non-visitors

- 3 in 5 (59%) of non-visitors to Wales in 2022 went elsewhere in the UK instead – just over 1 in 5 (21%) went abroad. 1 in 5 didn't take a holiday/short break at all. Younger life stages were most likely to have opted for a trip abroad, with 'retirees' the most likely to have gone somewhere else in the British Isles or Ireland.

Figure 37. Whether taken a trip somewhere else in 2022, Percentage, All respondents not taken a Wales trip in 2022



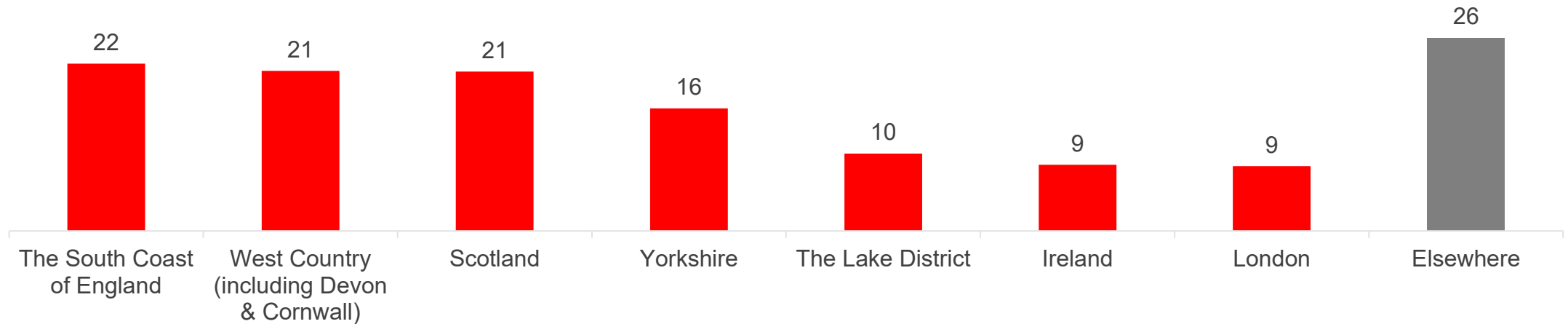
E2. Did you go somewhere else for a holiday/short break in 2022 or did you not take one at all?

Base: All respondents not taken a Wales trip in 2022 n=620

Destination in British Isles/Ireland visited instead of Wales

- The South Coast of England, the West Country and Scotland are the parts of UK and Ireland non-visitors to Wales were most likely to have visited for a holiday/short break in 2022., the South Coast of England and the Lake District were visited instead.

Figure 38. Trip destination region instead of Wales, Percentage, All not taken a Wales trip in 2022 but went elsewhere in British Isles



E3. To which of the following areas of British Isles and Ireland did you go on your holiday/short break in 2022?

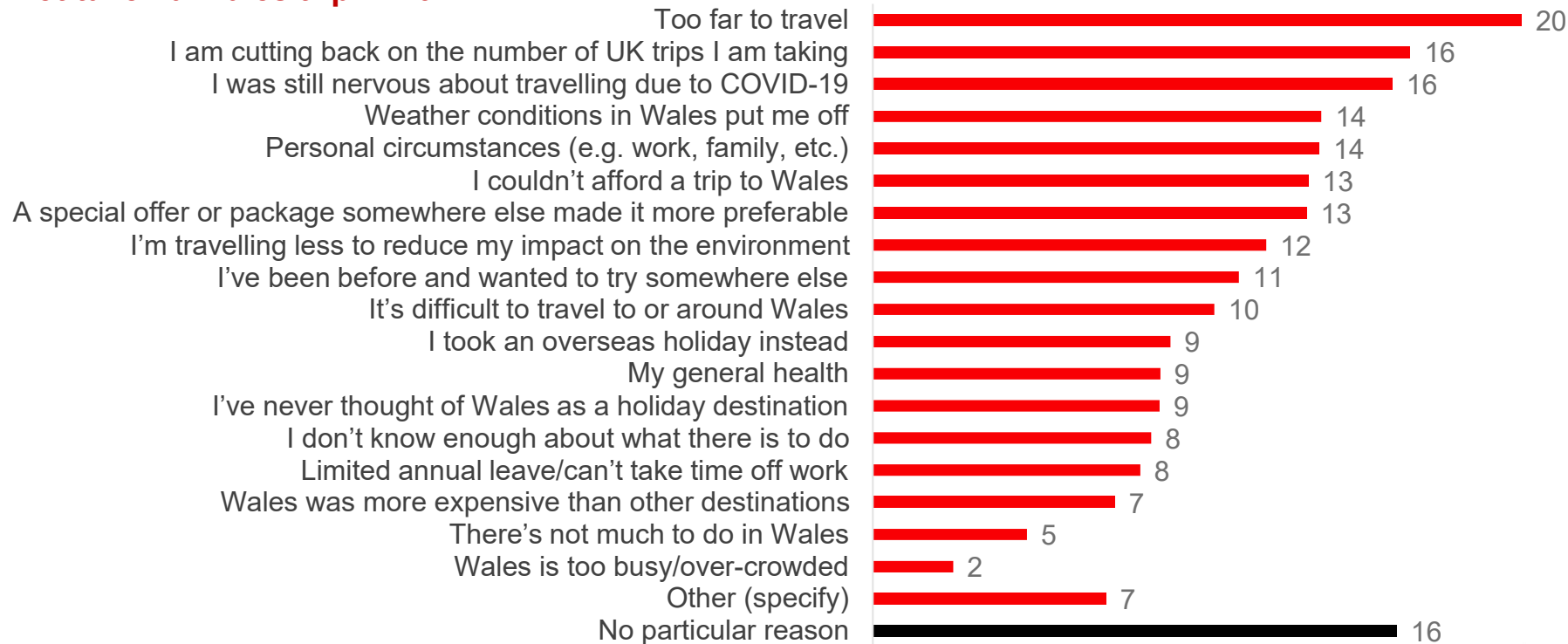
Base: All respondents not taken a Wales trip in 2022 and went elsewhere in British Isles n=359



Reasons for not taking an overnight Wales trip in 2022

- The top reasons for not visiting Wales for a short break or holiday in 2022 were ‘too far to travel’, ‘cutting back on the number of UK trips taken’, ‘nervous about travelling due to COVID-19’, and ‘weather conditions in Wales’. 2 in 5 respondents who cited ‘weather conditions’ opted to go abroad instead – those who stayed in the UK went to the South Coast/West Country). There were limited differences by life stage, although retirees were the least likely to state ‘I couldn’t afford a trip to Wales’ and pre-nesters were the most likely to cite ‘personal circumstances (e.g. work, family, etc.)’.

Figure 39. Reasons why didn't take a trip to Wales in 2022, Percentage, All respondents not taken a Wales trip in 2022



E4. What are the reasons that you didn't take a holiday or break in Wales in 2022?

Base: All respondents not taken a Wales trip in 2022 n=620



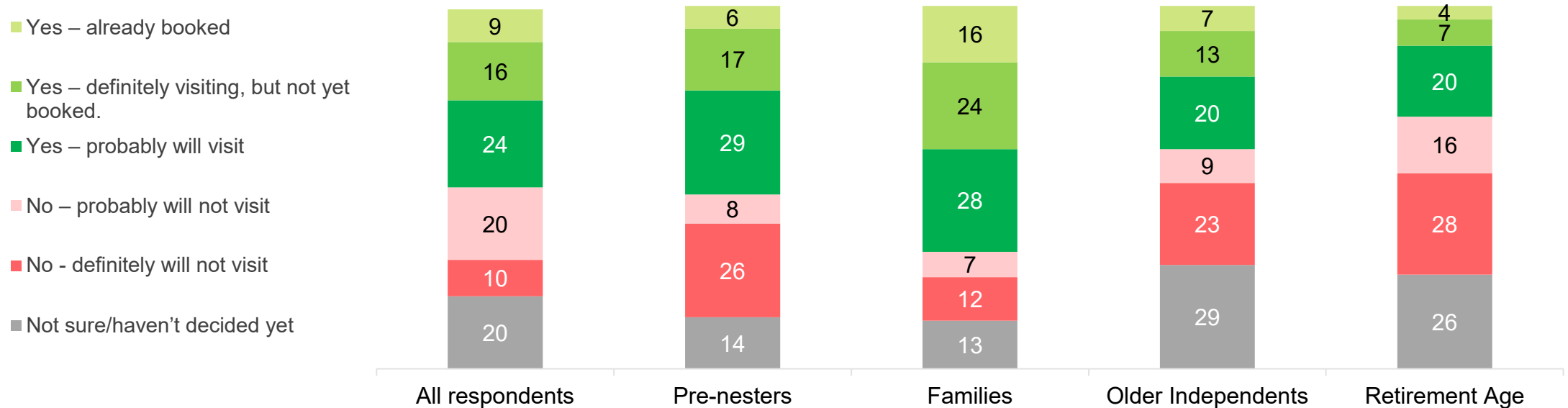
Visits to Wales in 2023



Overnight Wales trips intended in 2023

- A quarter of the 'UK holiday market' (respondents within this research) have either 'already booked' or 'are definitely visiting' Wales for a holiday/short break in 2023 with a further 1 in 4 indicating they will 'probably' visit. A minority have 'already booked' their trip.
- Families are more likely to indicate they will visit Wales for an overnight trip. Pre-nesters also demonstrate a strong interest; older independents and retirees the least likely to indicate that they will visit. However, pre-nesters are also less likely to report that they will take a short break or holiday to Wales within the next year than other life stages, so it may be that they do not convert from 'probably' to 'definite' – see slide 35.

Figure 40. Wales trips intended in 2023, Percentage, All respondents



F1. Are you intending to take a holiday or short break in Wales in 2023?

Base: All respondents n=1136 Base: Pre-nesters n=86; Families n=267; Older Independents n=106; Retirees n=57



Overnight Wales trips intended in 2023 by region of residence

- Residents of Wales show the strongest likelihood of taking a short break or holiday in Wales in 2023. However, residents of the North West of England are the most likely to have 'already booked', followed by other neighbouring regions the South West of England and the West Midlands.
- Likelihood to visit Wales is lowest in regions that are situated furthest away.

Figure 41. Already booked/definitely visiting Wales in 2023 by region of residence, All respondents



F1. Are you intending to take a holiday or short break in Wales in 2023?

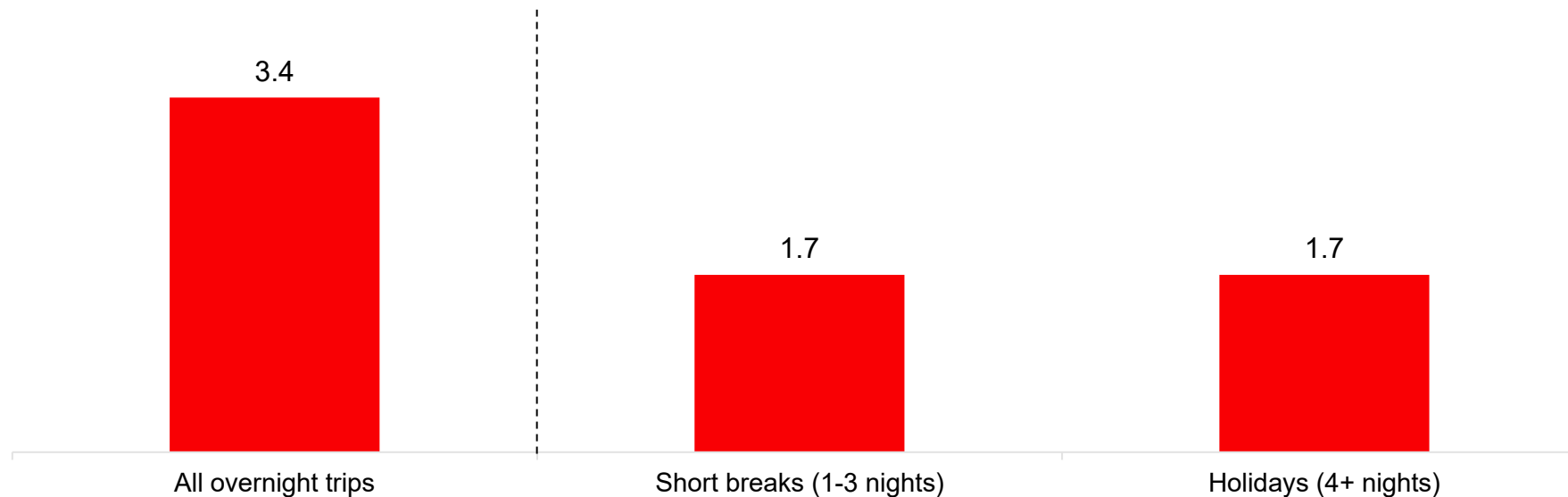
Base: All respondents Wales n=195; North West n= 109; West Mids n= 99; Yorkshire n= 79; London/Greater London n= 129; South West England n= 79; Scotland n= 80; East Mids n= 78; North East England n= 40; East of England n= 98; South East England n=130



Number of nights for Wales 2023 trip

- Similar to trips taken in 2022, Wales intenders for 2023 anticipate taking over 3 trips on average, split equally between short breaks and longer holidays of 4+ nights.

Figure 42. Average number of Wales trips intended, All 2023 Wales Intenders



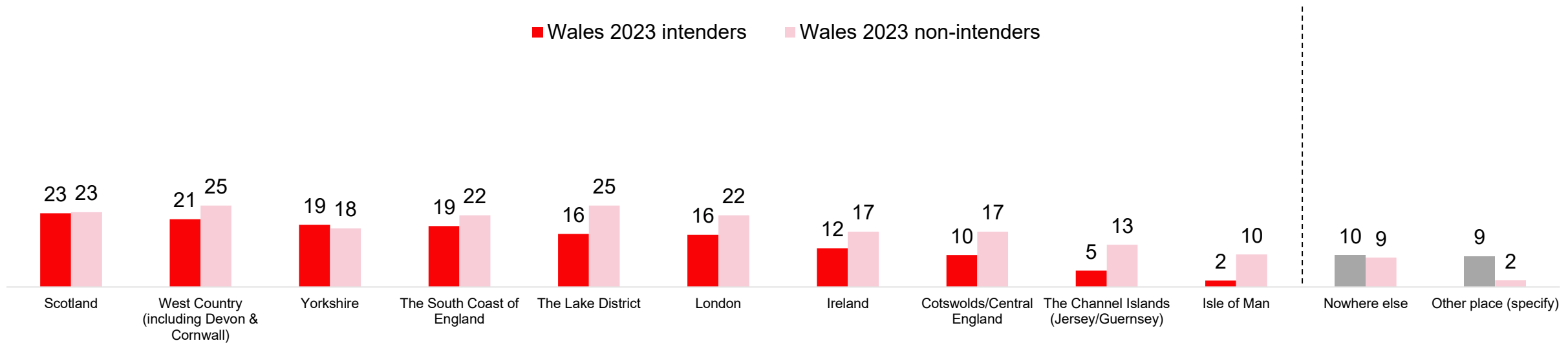
F2. Roughly how many holidays or short breaks do you plan on taking in Wales in 2023?

Base: All Wales 2023 intenders n= 616

Other UK/Ireland locations considered

- Both Wales 2023 intenders and non-intenders are likely to be considering Scotland, the West Country, Yorkshire and the South Coast of England for an overnight trip in 2023. The Lake District and London are also popular locations for an overnight trip in 2023 among Wales 2023 non-intenders. It's notable that Wales 2023 non-intenders are considering a broad range of destinations other than Wales. There are minimal differences by life stage.

Figure 43. UK and Ireland locations considered for visiting for a holiday or short break in 2023, Percentage, All 2023 Wales intenders and non-Intenders



F14/F16. Where, if anywhere, in the UK and Ireland are you seriously considering visiting for a holiday or short break in the next 12 months?

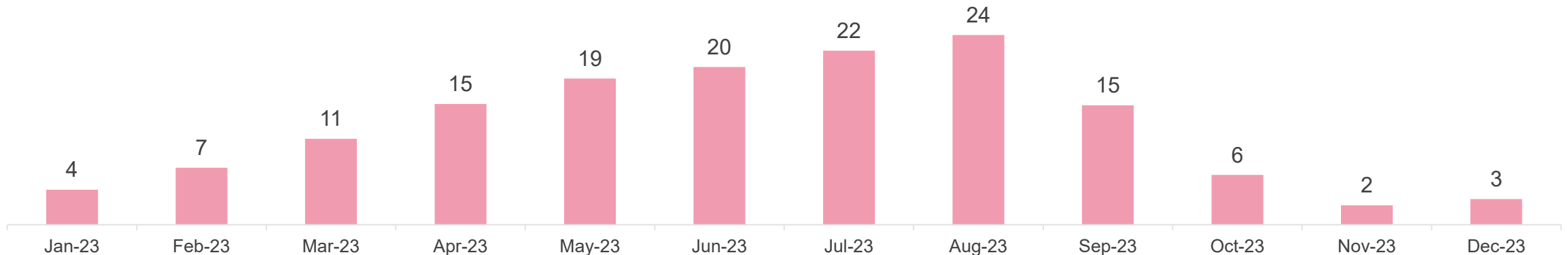
Base: All respondents planning a trip to Wales in 2023 n=616 All respondents not planning a trip to Wales in 2023 n=520



Months intending to take a trip in Wales

- Wales trip intenders are most likely to be planning to take their Wales trip in July or August 2023. November to February is relatively less appealing for a Wales trip compared to other months. Looking either side of the peak summer months, May and June appear to appeal more than September and October. However, it's possible that this relates to the proximity of these months to completing the survey – later in the year being less front of mind.

Figure 44. Months intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



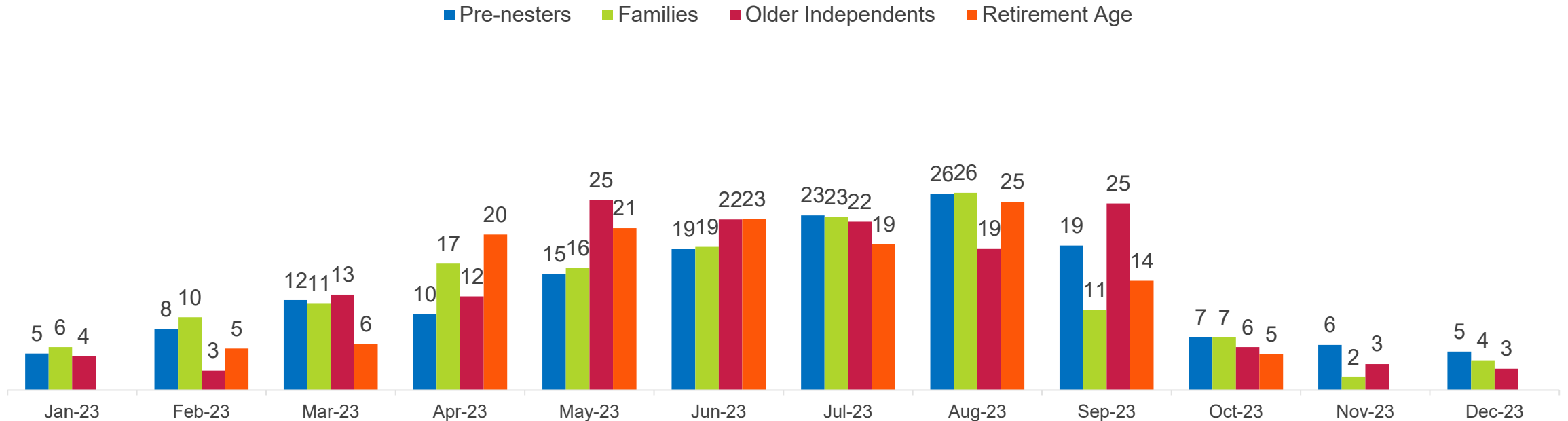
F3. When are you planning to take a holiday or short break in Wales in 2023?

Base: All Wales 2023 intenders n= 616

Months intending to take a trip in Wales by life stage

- Each life stage varies in their preference of month for an overnight Wales holiday or short break, although August is the most popular for all with the exception of older independents – for whom September and May are preferred. Families are especially likely to intend to take a trip in summer, although also indicate interest between May and June. Retirees indicate an interest in taking a trip in all months between April and August, although 2022 trip-taking behaviour suggests they may avoid the busy peak summer months. Pre-nesters show interest in taking a trip from May to September.

Figure 45. Months intending to take a trip in Wales by life stage, Percentage, All 2023 Wales Intenders



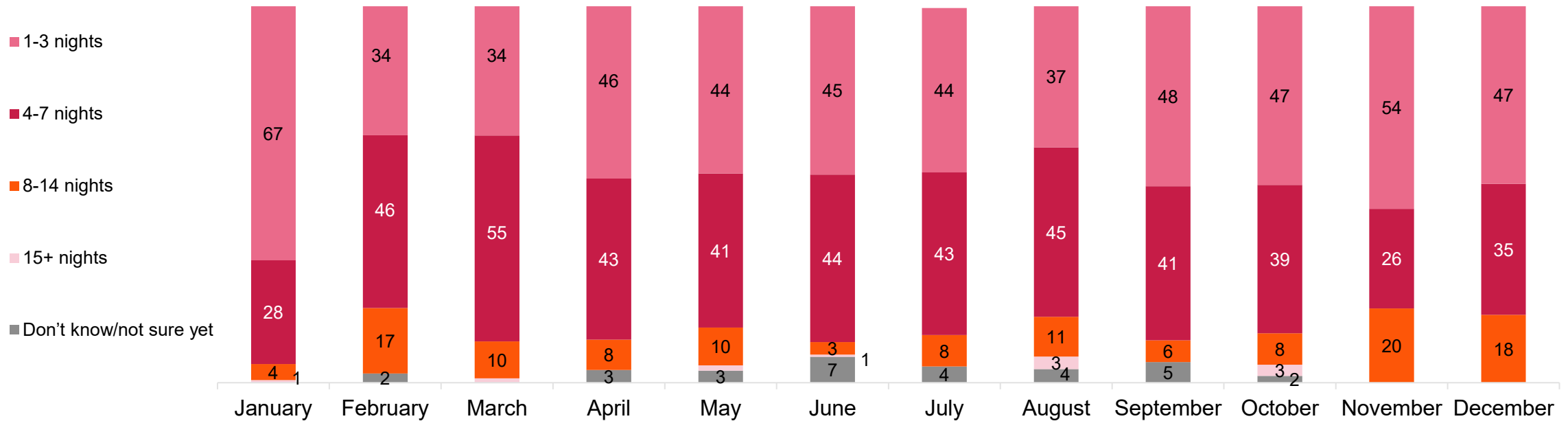
F3. When are you planning to take a holiday or short break in Wales in 2023?
 Base: Pre-nesters n=102; Families n=300; Older Independents n=135; Retirees n=79



Number of nights for Wales 2023 trip by month

- For most months of the year, Wales 2023 overnight trip intenders are more likely to anticipate a trip of 4+ months than 1-3 nights, with the exception of January and November where 1-3 nights trips were dominant.

Figure 46. Number of nights intending to stay in Wales in 2023, Percentage, All 2023 Wales Intenders



F4. Roughly how many nights do you anticipate spending on your holidays or short breaks in Wales in these months?

Base: January n=33*, February n=54; March n=71; April n=98; May n=111; June n=132; July n=143; August n=145; September n=102; October n=49*; November n=20*; December n=22*

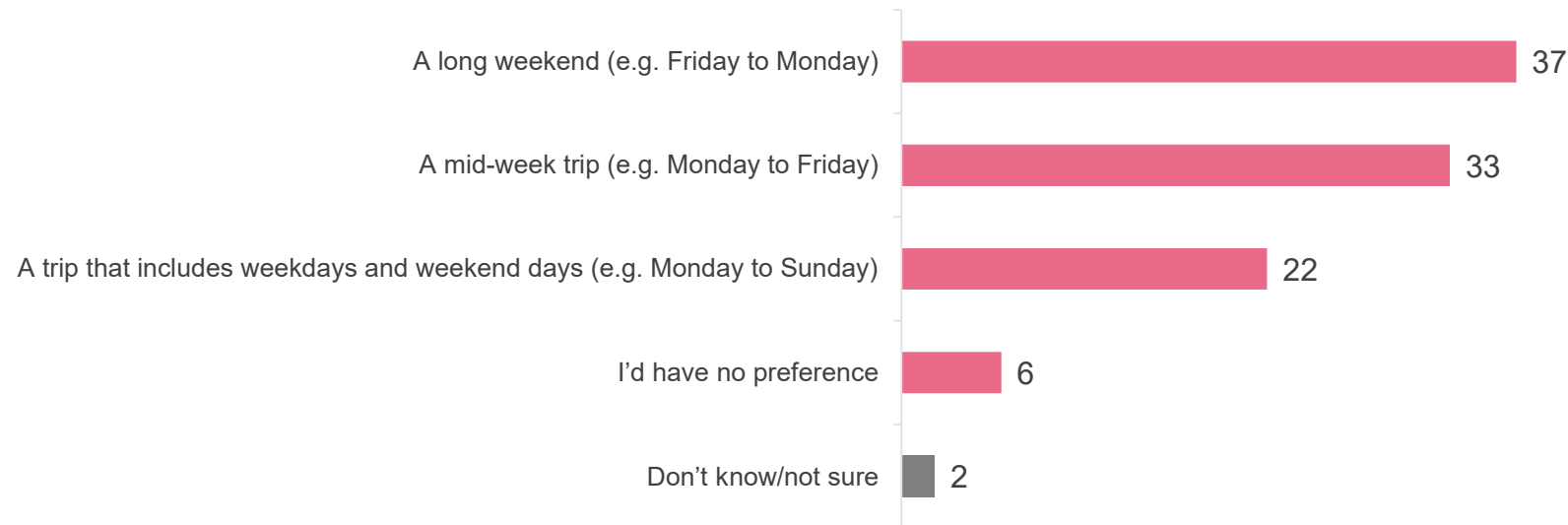
*Caution: Low base size – treat indicatively only



Time of the week for NEXT Wales 2023 trip

- Just over one third of Wales intenders plan on staying for a long weekend in Wales on their next trip, with nearly a quarter aiming to take a trip that includes both weekdays and weekend days.
- Intention to go on a long weekend is most apparent amongst pre-nesters and families, with retirees driving interest in mid-week trips. Older independents and retirees are more likely to report having no preference for the time of week for their next trip to Wales than pre-nesters and families.

Figure 47. Time of week intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



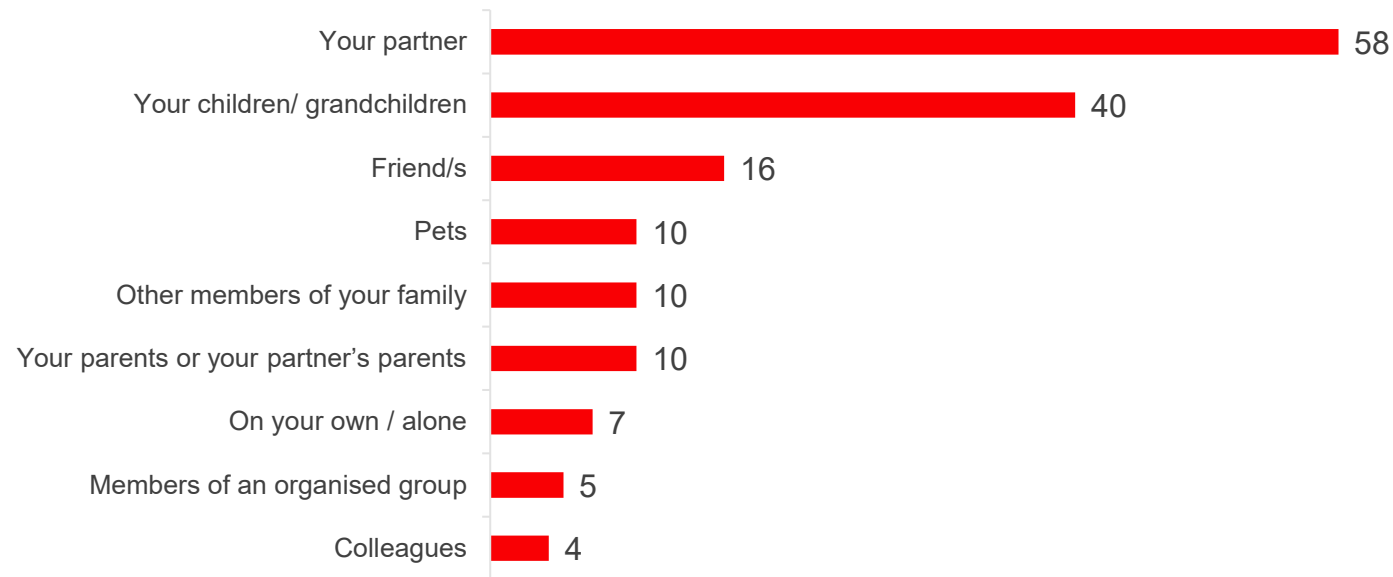
F5. Which time/s of week would you be most likely to take your next short break/holiday in Wales in?

Base: All Wales 2023 intenders n= 616 Pre-nesters n=102; Families n=300; Older Independents n=135; Retirees n=79

Party composition for NEXT trip in Wales in 2023

- Nearly 3 in 5 (58%) intenders plan to visit Wales with their partner on their next trip and 2 in 5 (40%) with their children/ grandchildren. Friends will accompany 1 in 6 (16%). Pets, other members of the family, and parents/their partner's parents will each accompany 1 in 10 (10%).
- Families are most likely to be accompanied on their next holiday or short break in Wales by their children or grandchildren (64%). Pre-nesters, older independents and retirees are most likely to be accompanied by their partners. Pre-nesters are more likely to be accompanied by their friends, their parents/their partner's parents, or to visit alone than other life stages.

Figure 48. Who is likely to accompany those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



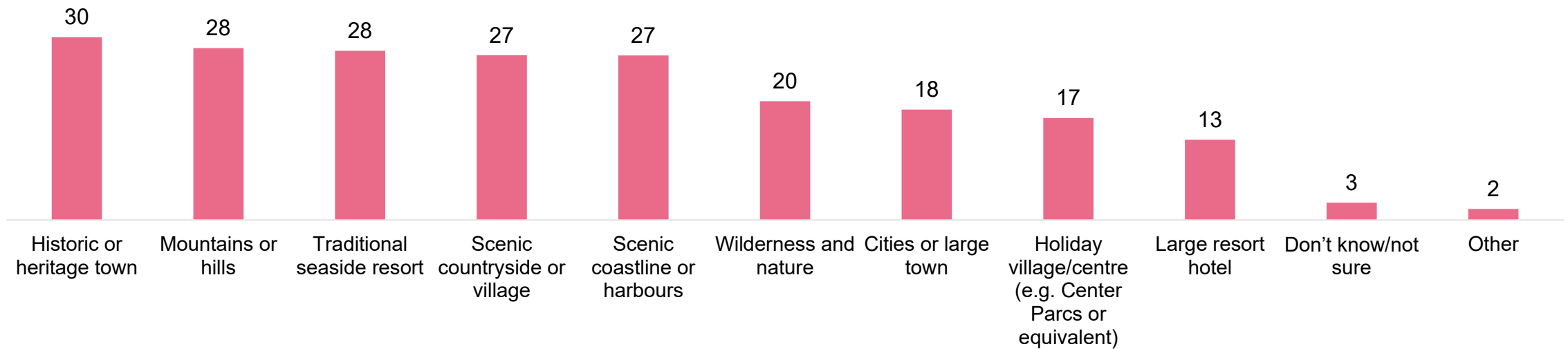
F6. Who, if anyone, is likely to accompany you on your next holiday or short break in Wales?

Base: All Wales 2023 intenders n= 616; Pre-nesters n=102; Families n=300; Older Independents n=135; Retirees n=79

Destination preference for NEXT Wales 2023 trip

- Almost a third of those intending to visit Wales in 2023 plan on staying in a 'historic or heritage town' on their next trip, with a similar proportion intending to stay in 'mountains or hills', 'a traditional seaside resort', 'scenic countryside or village' and 'scenic coastline or harbours'.
- The high combined proportion of intended destination types suggests that visitors are as yet undecided on their destination.

Figure 49. Type of destination of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



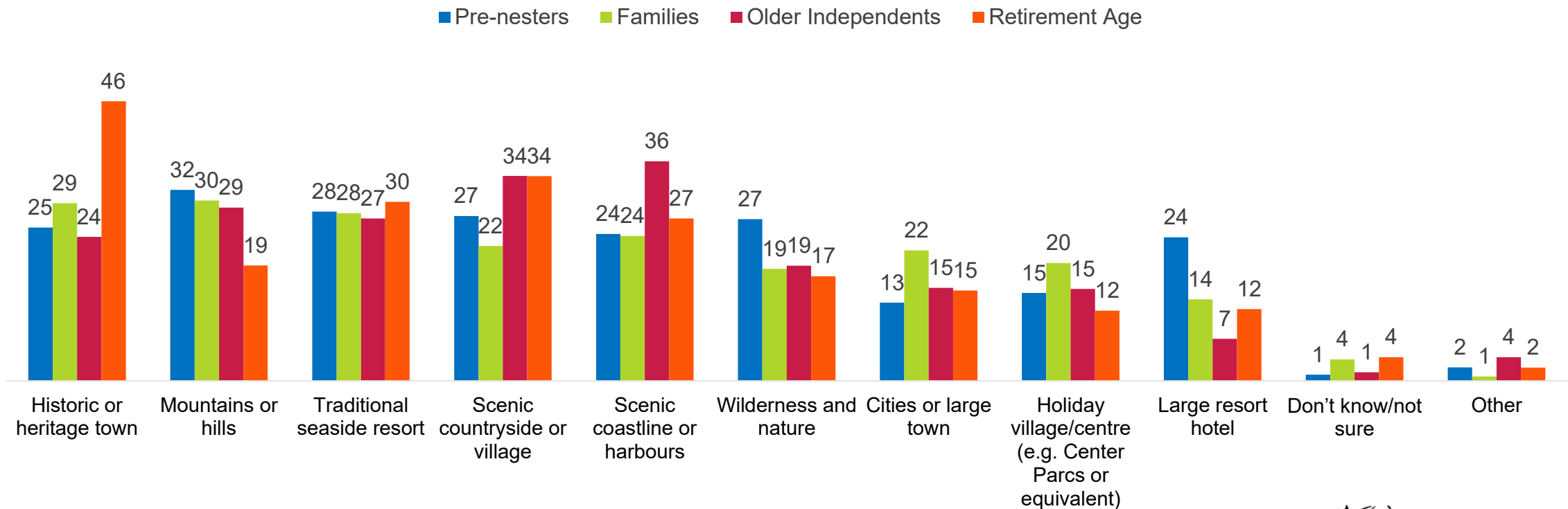
F8. Which of the following best describes the main types of destination you are likely to stay in during your next short break or holiday in Wales?

Base: All Wales 2023 intenders n= 616

Destination preference for NEXT Wales 2023 trip by life stage

- Aligned with general preference, there is variation in destination type preference by life stage. 'Historic or heritage towns' indexes high for retirees, while 'scenic coastline or harbours' indexes high for older independents, and 'scenic countryside or village' indexes high for retirees *and* older independents. Families indicate a preference for a range of destination types. There are some differences with 2022 trip behaviour but this will be partly driven by the focus on 'next trips' for 2023 intentions (2022 data referred to trips taken across the whole year).

Figure 50. Type of destination of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



F8. Which of the following best describes the main types of destination you are likely to stay in during your next short break or holiday in Wales?

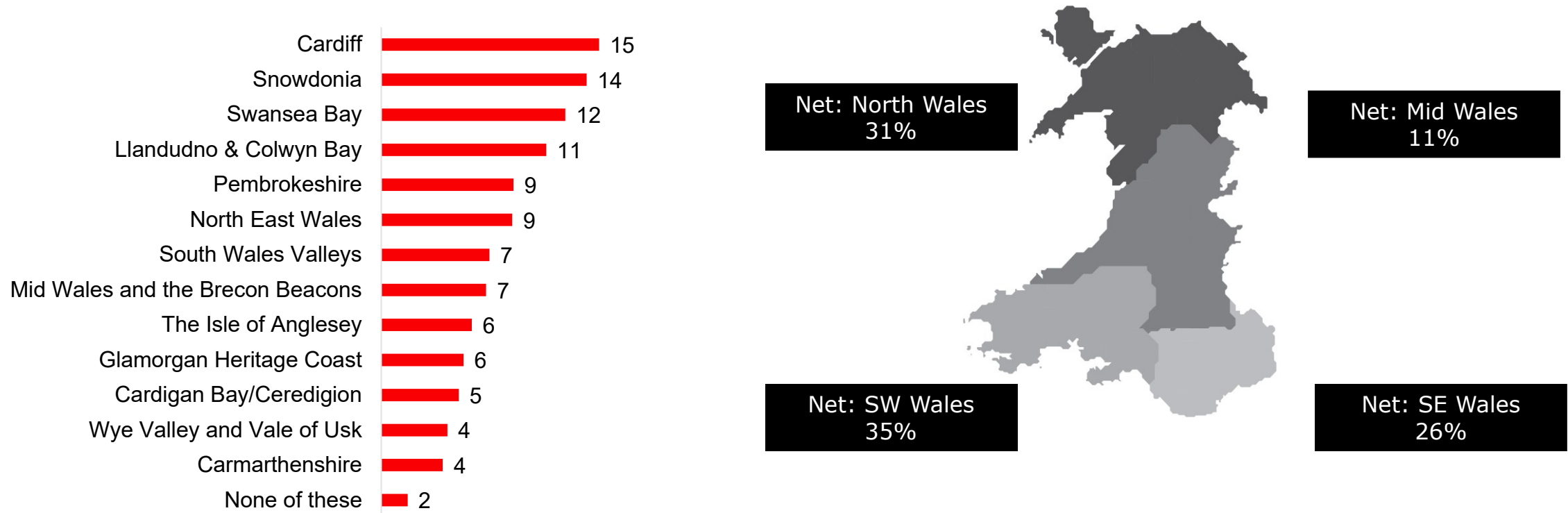
Base: Pre-nesters n=102; Families n=300; Older Independents n=135; Retirees n=79



Areas planned on staying overnight when taking NEXT trip in Wales

- Cardiff is the destination Wales 2023 intenders are most likely to visit on their next Wales trip (driven by pre-nesters at 21%), followed by Snowdonia and Swansea Bay. North East Wales is the 6th most preferred, although the number one destination amongst families. Although Wye Valley and the Vale of Usk has low relative appeal overall, amongst retirees it is the *most* popular destination at 12%.

Figure 51. Areas of stay of those intending to take next trip in Wales, Percentage, All 2023 Wales Intenders



F7. Which of these areas do you plan on staying overnight on your next holiday or short break in Wales?

Base: All Wales 2023 intenders n= 616

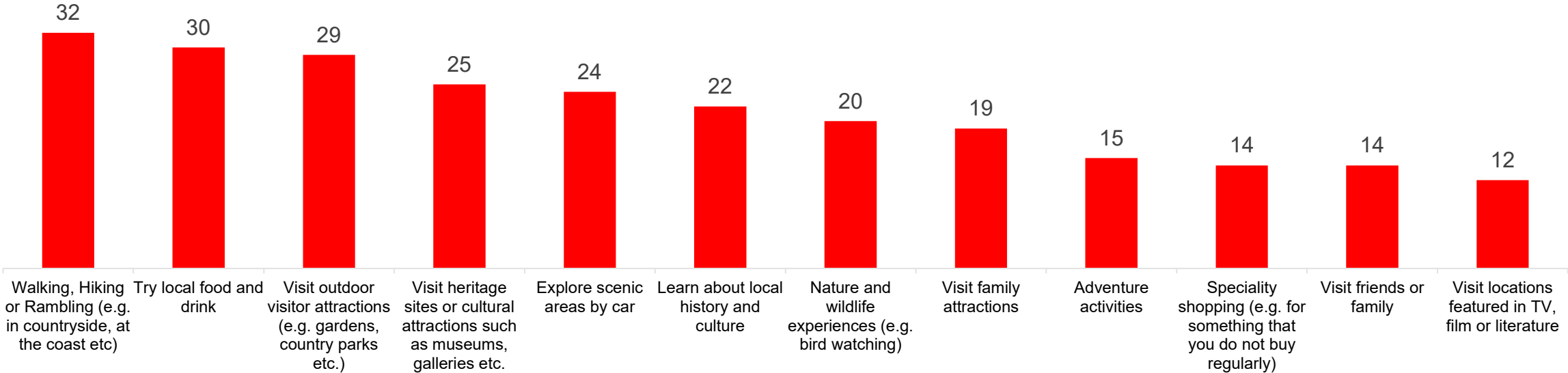
North Wales = North East Wales, Llandudno & Colwyn Bay, Snowdonia Mountains & Coast, The Isle of Anglesey; Mid Wales = Mid Wales and the Brecon Beacons and Ceredigion; SW Wales = Pembrokeshire, Carmarthenshire and Swansea Bay; SE Wales = Cardiff, The Valleys of South Wales, Glamorgan Heritage Coast and Wye Valley



Activities planned on NEXT Wales trip

- ‘Walking and hiking’ is the leading activity planned for next Wales trips in 2023, followed closely by ‘trying local food and drink’ and ‘visiting outdoor visitor attractions’.

Figure 52. Top 12 activities of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



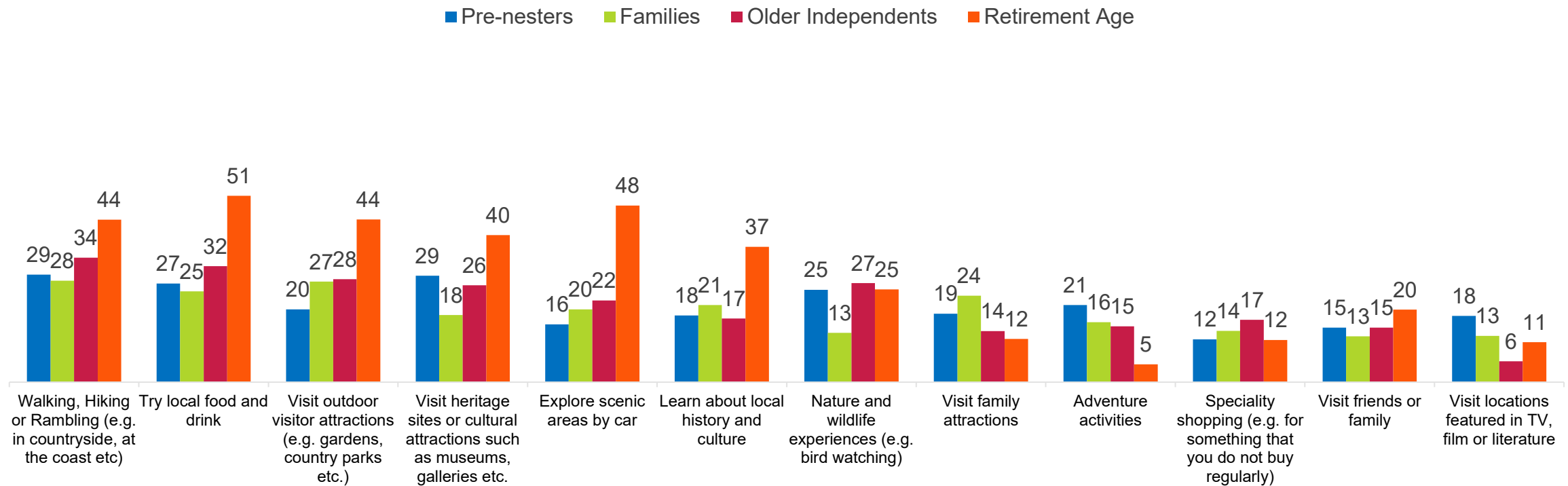
F9. Which, if any, of these activities are you likely to do on your next short break or holiday in Wales in?
 Base: All Wales 2023 intenders n= 616



Activities planned on NEXT Wales trip by life stage

- Pre-nesters are most likely to plan on ‘walking, hiking or rambling’, visiting heritage site’ and ‘trying local food and drink’. For ‘families’ the preferred activities as ‘walking, hiking or rambling’, visiting outdoor attractions’ and ‘trying local food and drink’. ‘Older independents’ are also most likely to conduct ‘walking, hiking or rambling’, ‘trying local food and drink’ and ‘visiting outdoor attractions’. Retirees are most likely to plan on ‘trying local food and drink’, ‘exploring scenic areas by car’, ‘walking, hiking or rambling’ and ‘visiting outdoor attractions’, and are more likely to plan on doing each of these than other life stages.

Figure 53. Top 12 activities of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



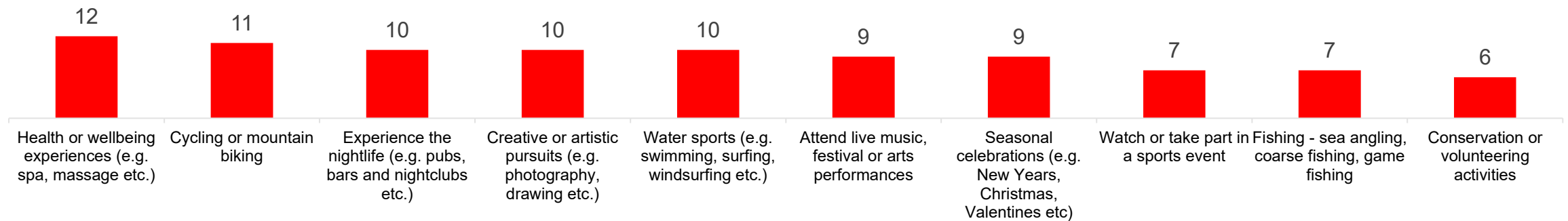
F9. Which, if any, of these activities are you likely to do on your next short break or holiday in Wales in?

Base: Pre-nesters n=102; Families n=300; Older Independents n=135; Retirees n=79

Activities planned on taking part in when taking NEXT trip in Wales

- There are a number of activities that have niche interest for around 1 in 10 or fewer potential visitors to Wales. 'Conservation and volunteering' is the least planned activity on a short break or holiday in Wales closely followed by fishing and watching/taking part in a sports event.
- There are limited differences by life stage, with the exception of 'seasonal experiences' which are favoured by 'pre-nesters' and 'families'.

Figure 54. Bottom 10 activities of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders

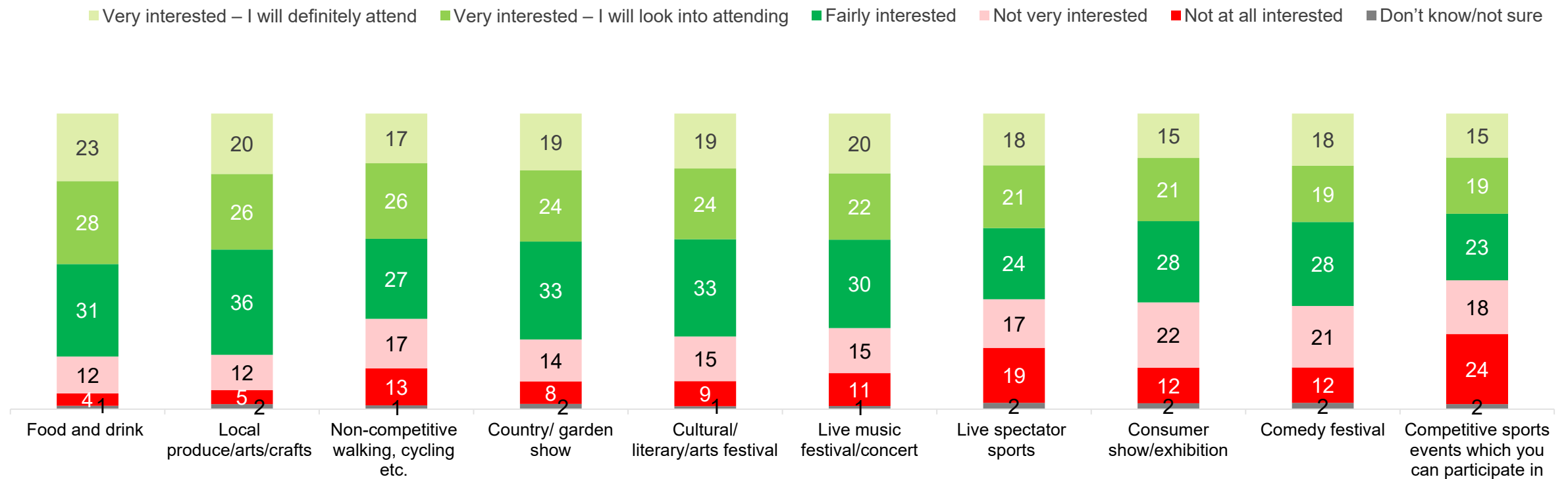


F9. Which, if any, of these activities are you likely to do on your next short break or holiday in Wales in?
Base: All Wales 2023 intenders n= 616

Interest in attending festivals or events when taking a trip in Wales

- There is strong general interest in festivals/events in Wales amongst Wales 2023 intenders – ‘food and drink’, ‘local produce/arts/crafts’, ‘non-competitive walking/cycling’ and ‘country/garden shows’ generating the strongest interest.

Figure 55. Interest in festivals/events of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



F10. How, if at all, interested would you be in attending the below types of festivals or events in Wales in 2023?
Base: All Wales 2023 intenders n= 616



Sources of information to use when taking a trip in Wales

- Trip-takers to Wales are likely to use a range of sources to plan their 2023 overnight short break or holiday – conversations with friends, search engines and printed travel guide books/brochures are the main influences.
- ‘Conversations with friends/family who have visited’ is a popular information source across all life stages. ‘Search engines’ and ‘tourist board websites’ are more popular among retirees. Retirees are less likely to report using ‘a friend or family member’s social media activity’ or ‘emails from tourist boards’ as information sources to plan a trip to Wales in 2023 than other life stages.

Figure 56. Sources of information used/likely to use of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



F12. Which, if any, of these information sources are you likely to or have you already used to plan your trip/s to Wales in 2023?

Base: All respondents intending to take a Wales trip n= 616

Barriers to visiting Wales in 2023



Reason for not visiting Wales in the next 12 months

- Similar to barriers to visiting Wales in 2022, the two leading reasons for not visiting Wales in 2023 are it is ‘too far to travel’ and ‘cutting back on UK trips’. Amongst the other reasons ‘destination-based’ factors are the most dominant category of reasons for not visiting Wales in 2023. However, unlike trips in 2022, ‘I am taking an overseas holiday instead’ is the leading individual reason driving this. A notable 1 in 7 unable to afford a trip to Wales.

Figure 57. Top 10 reasons for not visiting Wales for a holiday or short break in 2023, Percentage, All 2023 non-visitors to Wales



F15.What are the reasons that you are not planning to visit Wales for a holiday or short break in 2023?

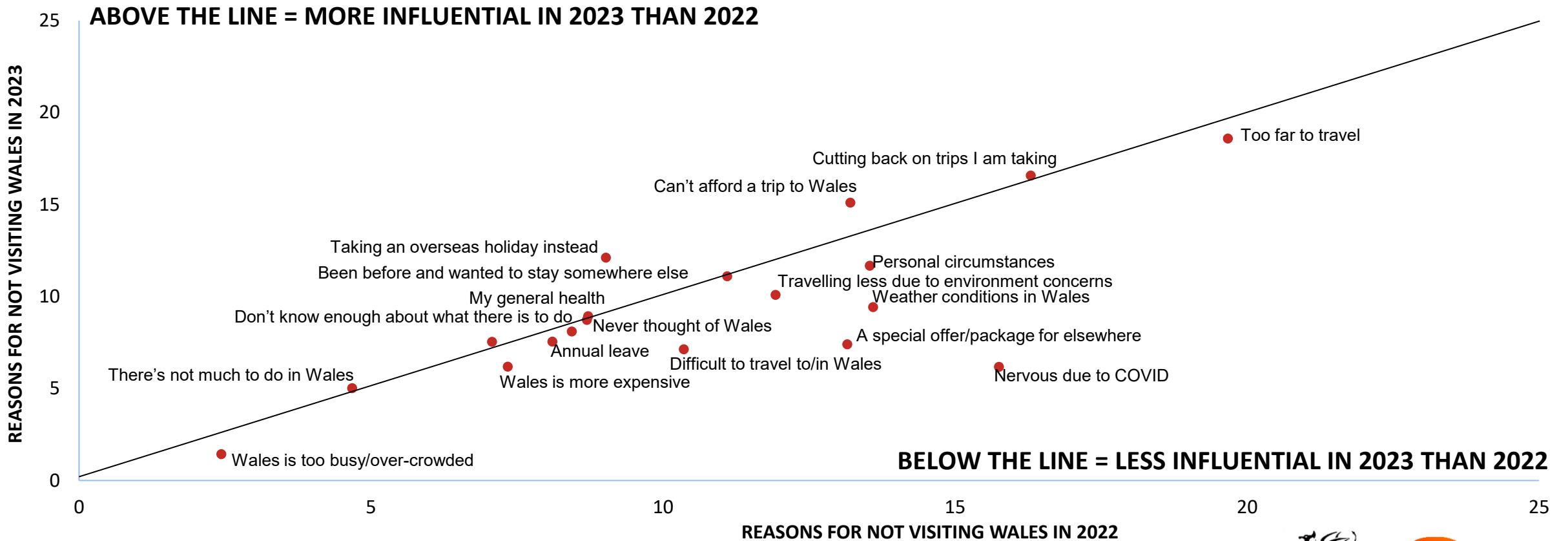
Base: All respondents not planning a trip to Wales in 2023 n=520



Reasons for not visiting Wales in 2023 compared to 2022

- Compared to 2022, those who are not planning to visit Wales in 2023 are more likely to state they 'can't afford a trip to Wales' and that they are 'taking an overseas holiday instead'. Notably, they are less likely to state they are 'nervous due to COVID'.

Figure 58. Reasons for not visiting Wales in 2022 compared to reasons for not planning to visit Wales in 2023, Percentage.



F15. What are the reasons that you are not planning to visit Wales for a holiday or short break in 2023?

Base: All respondents not planning a trip to Wales in 2023 n=520 E4. What are the reasons that you didn't take a holiday or break in

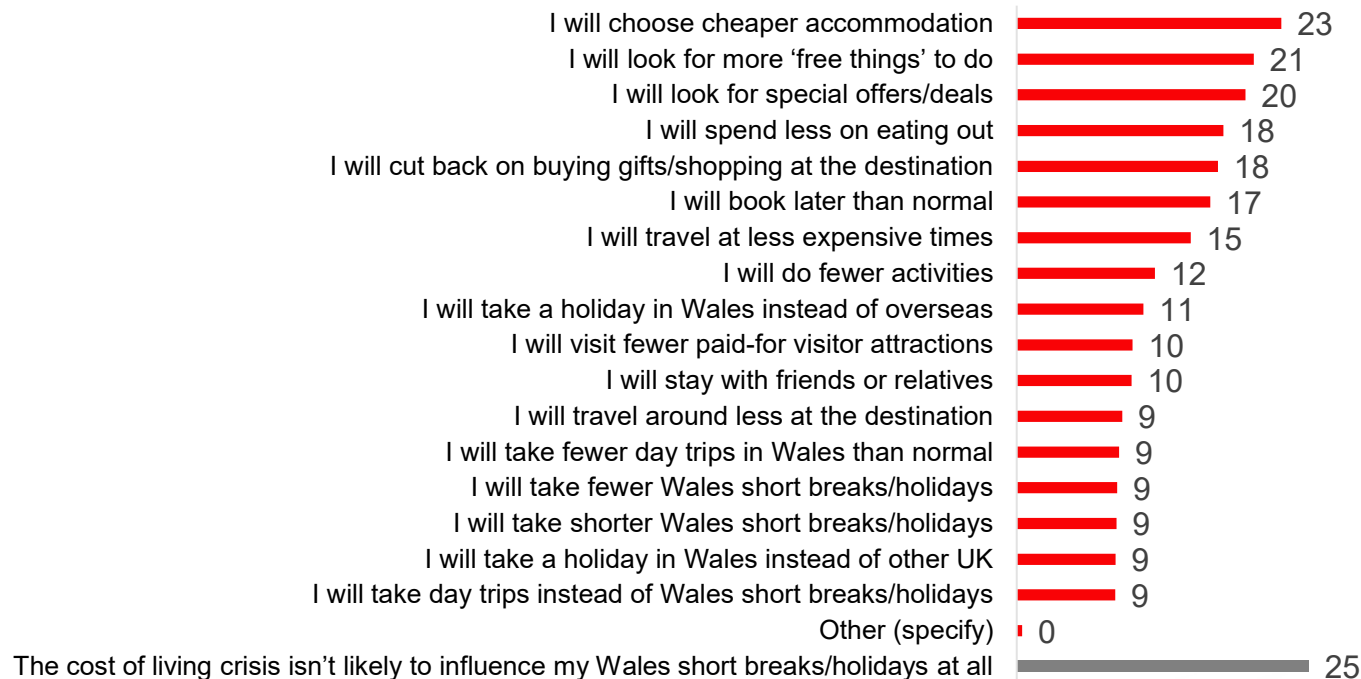
Wales in 2022? Base: All respondents not taken a Wales trip in 2022 n=620



Influence of cost of living crisis when taking a trip in Wales

- The cost of living crisis is likely to have a widespread influence on trips in Wales in 2023, with 3 in 4 potential visitors indicating some way of managing costs. 'I will choose cheaper accommodation', 'I will look for more free things to do' and 'I will look for special offers/deals' are the main ways in which behaviour will be moderated, but nearly 2 in 10 visitors may also cut back on secondary spending on eating out or shopping at the destination.
- Broadly those who have been hit harder by the cost-of-living crisis or who are being careful with finances are more likely to cut back on trip spending – in particular on accommodation, spending on eating out, looking for free things to do and travelling at less expensive times.

Figure 59. Top ways in which cost-of-living crisis is likely to influence trips to Wales in 2023, Percentage, All 2023 Wales intenders and cost-of-living impact groups



X4d. How, if at all, would you say the 'cost of living crisis' is likely to influence your trips to Wales in 2023?

Base: All Wales intenders n=616'



Llywodraeth Cymru
Welsh Government



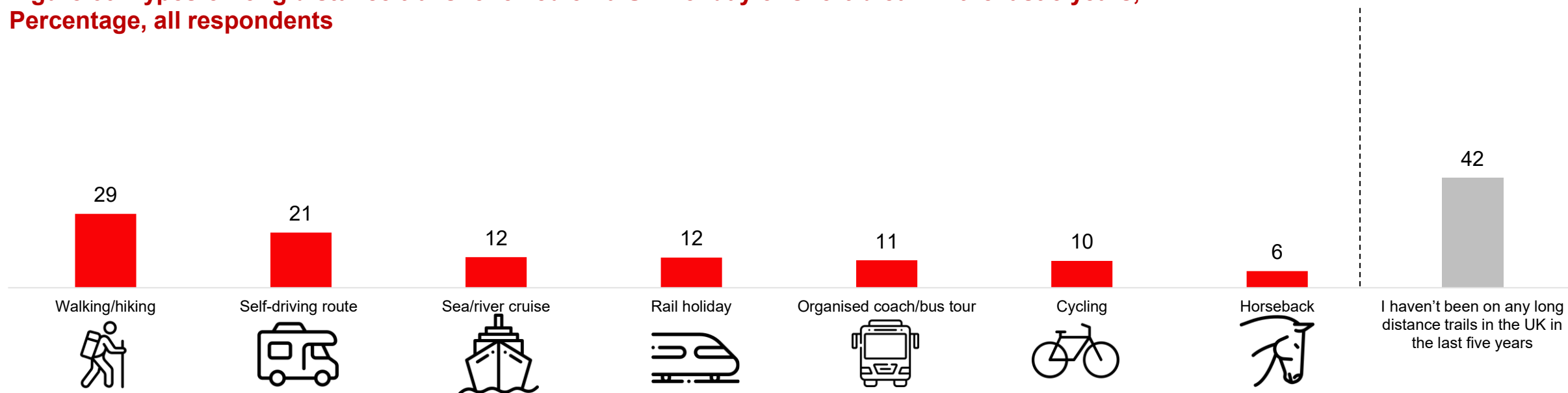
The Appeal of Touring/Trails



Long distance trails followed on a domestic break in the last 5 years

- Over half (58%) of 'the UK holiday market' (respondents to this survey) claim to have followed a long distance trail on a UK holiday or short break in the last 5 years – 'walking/hiking' and 'self-driving route' the most popular (see footer for definition of long distance trail). 'Families' are the life stage most likely to have taken a long distance domestic trail in the last 5 years, followed by 'pre-nesters'. Although 'older independents' and 'retirees' are least likely to have taken a long distance trail, of the trails they are interested in 'self-driving routes' and 'walking/hiking' are preferred.

Figure 60. Types of long distance trails followed on a UK holiday or short break in the last 5 years, Percentage, all respondents



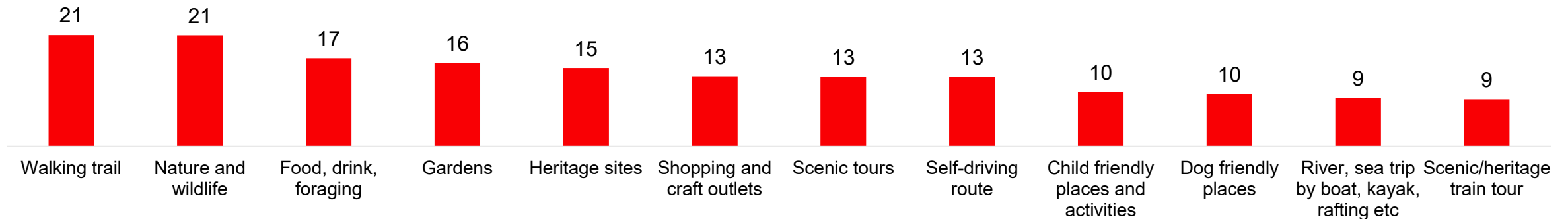
G1. Which, if any, of the following types of long distance trails have you followed on a UK holiday or short break in the last 5 years? By 'long distance trail' we mean a trip that involves visiting multiple locations across the UK, lasting several days or longer, and staying overnight in different places.

Base: All respondents n=1136

Special interest trails followed on a domestic break in last 5 years

- Around 7 in 10 (71%) of 'the UK holiday market' (respondents to this survey) claim to have followed a special interest trail on a domestic holiday in last 5 years.
- The most popular 'special interest trails' are 'walking trails', and 'nature and wildlife' – both followed by around 1 in 5. A range of other trails are also popular, including 'food, drink and foraging', 'gardens', 'heritage sites' and 'scenic and self driving tours'.

Figure 61. Top 12 special interest trails followed on a UK holiday or short break in the last 5 years, Percentage, All respondents



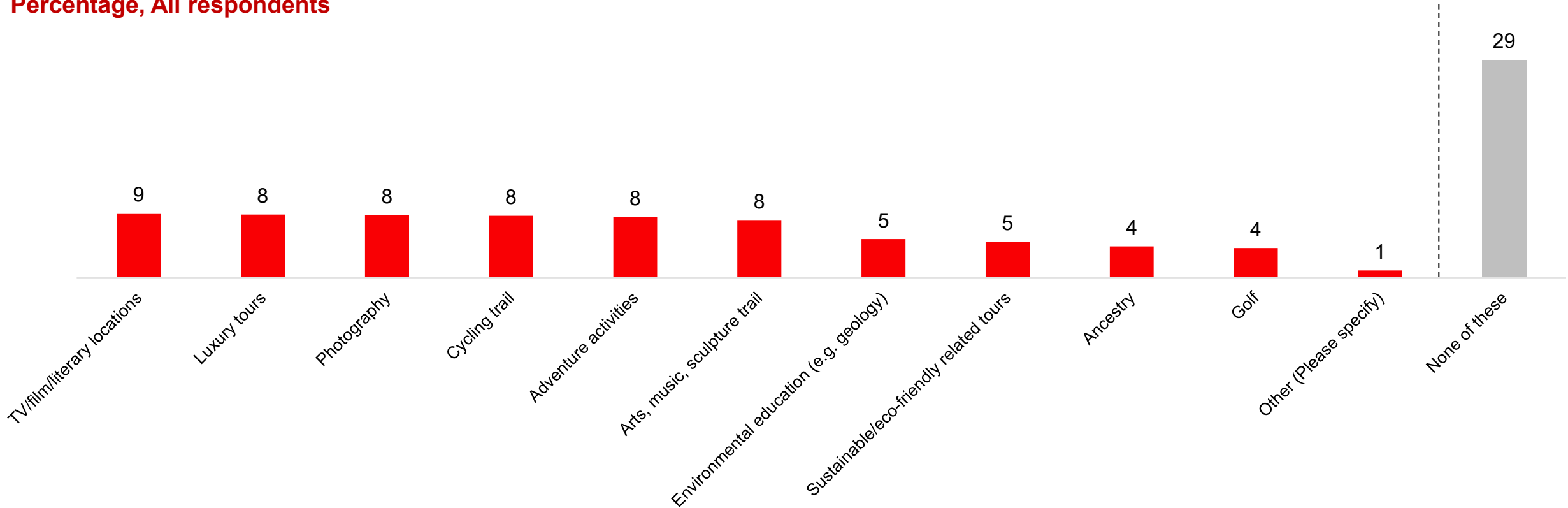
G2. Which, if any, of the following long or short distance special interest trails have you followed on a UK holiday or short break in the last 5 years? This could be a longer distance trip visiting multiple locations over several days or a shorter day excursion visiting different places in the locality where you are staying

Base: All respondents n=1136

Special interest trails followed on a domestic break in last 5 years

- There are a wide range of other types of special interest trails that the UK holiday market has taken in last 5 years, but these have been followed by a relatively small proportion of visitors. These include creative themed trails, specific activities and environmental education.

Figure 62. Bottom 12 special interest trails followed on a UK holiday or short break in the last 5 years, Percentage, All respondents

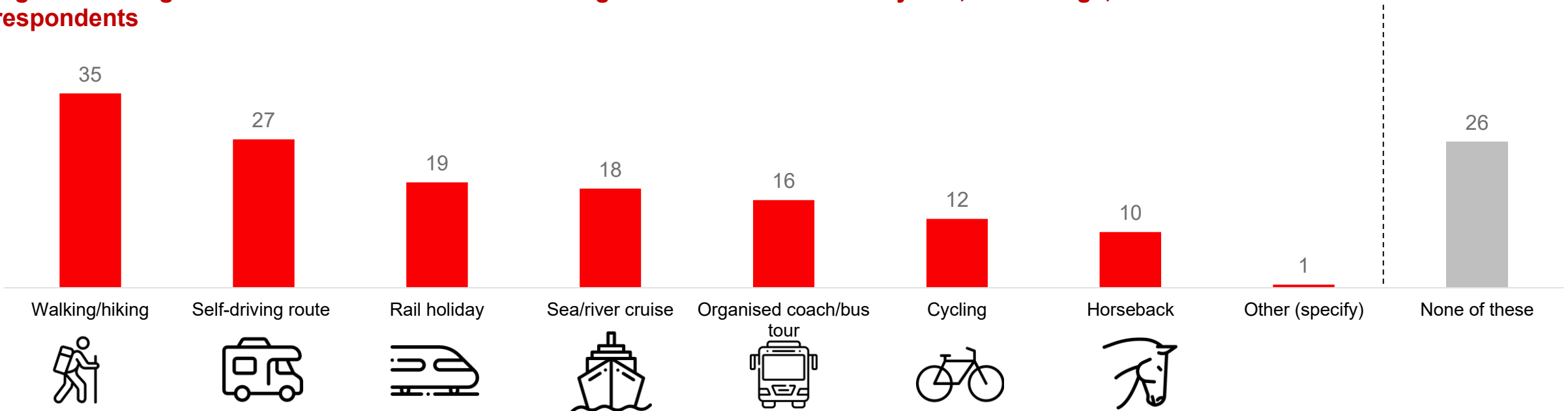


G2. Which, if any, of the following long or short distance special interest trails have you followed on a UK holiday or short break in the last 5 years?
Base: All respondents n=1136

Long distance trails interest in Wales

- When looking at long distance trails that visitors would be interested in taking in Wales within the next few years, walking/hiking was first choice (as it was for those taking a long distance trail in the last 5 years), followed again by a self-driving route. 'Rail holidays' and 'coach/bus tours' have a lower but notable level of interest. Only 1 in 10 said that they would consider a long distance trail by horseback, with a similar proportion stating 'cycling'.
- Notably, interest in taking a long distance trail in Wales in the next few years is higher than trails taken in the UK in the last five years, suggesting there is strong demand for this type of trip in Wales

Figure 63. Long distance trails interested in following in Wales in the next few years, Percentage, All respondents



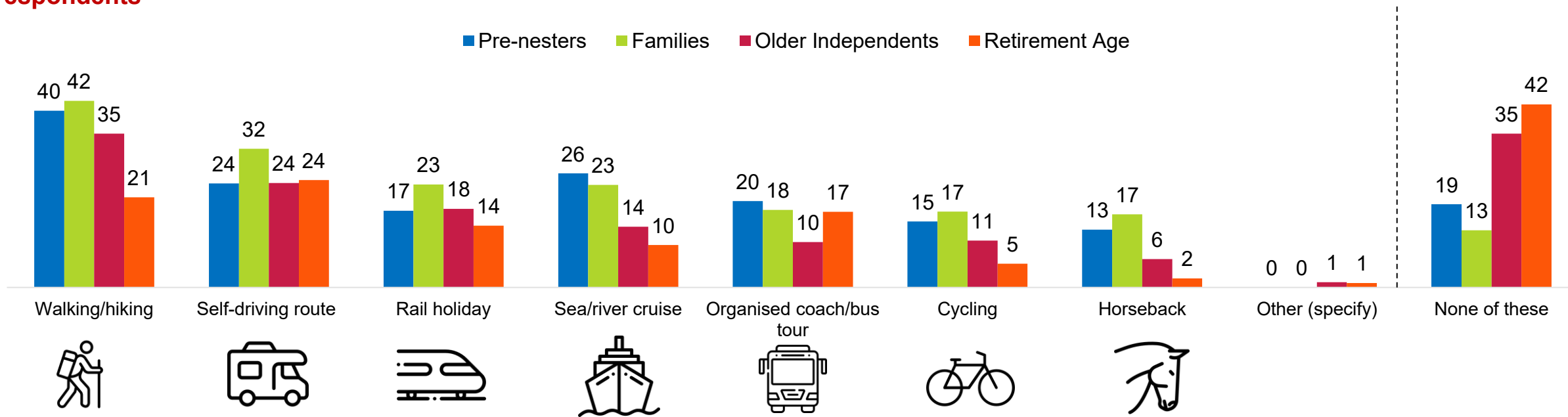
G3. Now looking ahead, which, if any, of these types of long distance trails would you be interested in following on a Wales holiday or short break in the next few years?

Base: All respondents n=1136

Long distance trails interest in Wales by life stage

- There is some variation in long distance trail interest by life stage – generally, pre-nesters and families show more interest, in particular for more physically active trails such as ‘walking/hiking’, ‘cycling’, and ‘horseback’. Interest in self-driving routes, rail holidays and organised coach/bus holidays is more evenly spread across different life stages.
- Life stage interest in future long distance trails in Wales broadly replicates trails followed in the UK in the last five years with the exception of pre-nesters who show a stronger interest in future trips.

Figure 64. Long distance trails interested in following in Wales in the next few years, Percentage, All respondents



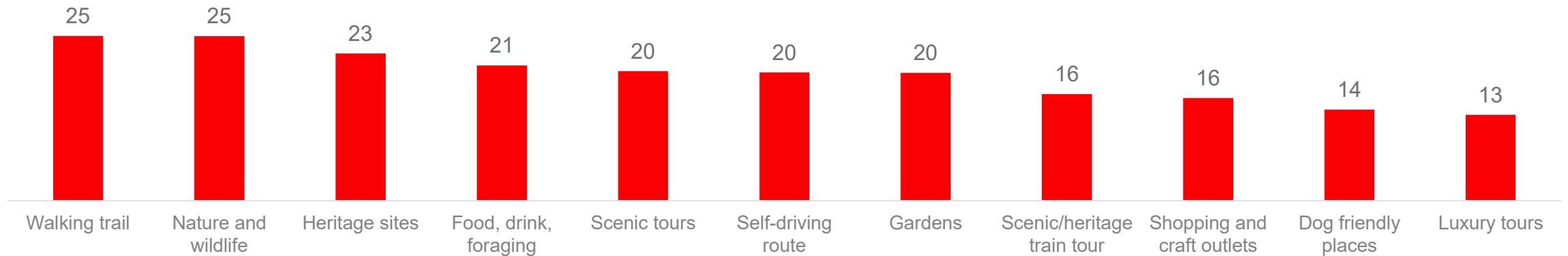
G3. Now looking ahead, which, if any, of these types of long distance trails would you be interested in following on a Wales holiday or short break in the next few years?

Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222

Special interest trails appeal on a Wales holiday or short break

- When looking at interest in taking special interest trails in Wales, 'walking/hiking' is first choice (as it was for those taking part in a trail in the last 5 years), followed again by a nature/wildlife route. A range of other trails were also of interest including 'heritage sites' and 'food, drink, foraging' and scenic and self-driving routes'.
- Notably, as with long-distance trails, interest in taking a special interest trail in Wales in the next few years is higher than those taken in the UK in the last five years, again suggesting there is strong demand for this type of trip in Wales

Figure 65. Special interest trails interested in following in Wales in the next few years, Percentage of Top 11, All respondents



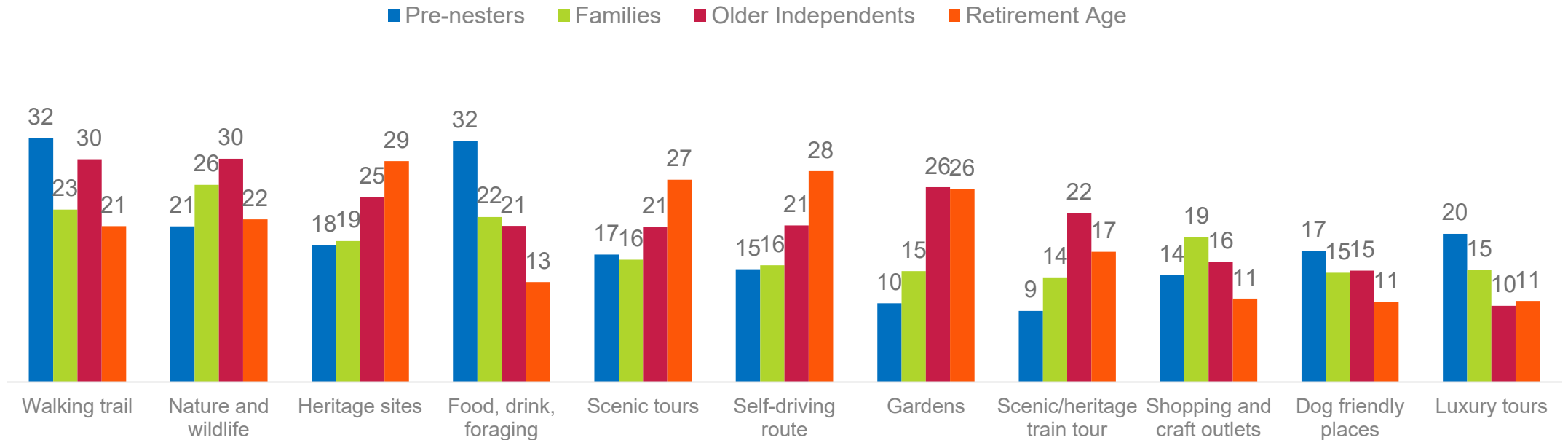
G4. And which, if any, of these types of long or short distance special interest trails would you be interested in following on a Wales holiday or short break in the next few years?

Base: All respondents n=1136

Special interest trails appeal on a Wales holiday or short break

- There is variation in special interest trails appeal by life stage. For example, ‘food, drink foraging’ and ‘walking trails’ index higher for ‘pre-nesters’, with ‘heritage sites’, ‘self-driving routes’, ‘scenic tours’, and ‘gardens’ of appeal to older life stages. Families are most interested in trails based around ‘nature and wildlife’, ‘walking’, ‘food and drink’ and ‘heritage sites’.

Figure 66. Special interest trails interested in following in Wales in the next few years, Percentage of Top 11, All respondents



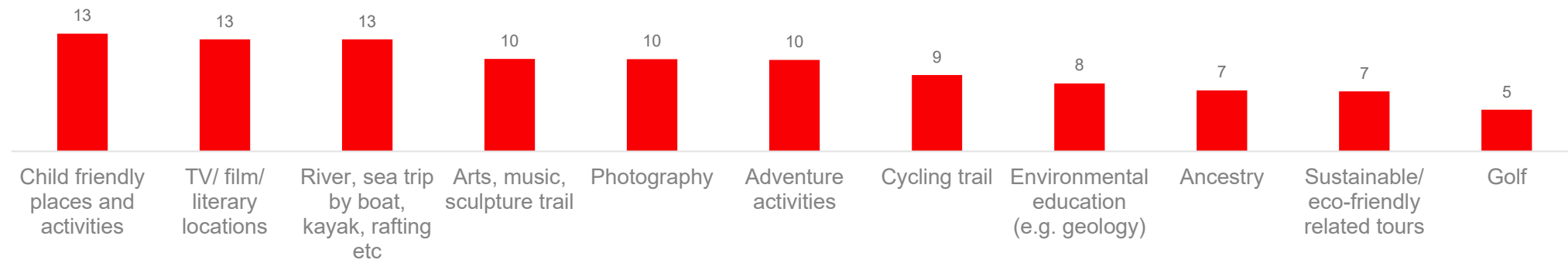
G4. And which, if any, of these types of long or short distance special interest trails would you be interested in following on a Wales holiday or short break in the next few years?

Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222

Special interest trails appeal on a Wales holiday or short break

- A number of other special interest trails are of interest for holidays in Wales, albeit these appeal to a minority of the UK holiday market. Child friendly activities, TV/film/literary locations and water-based trips are of most interest amongst these.

Figure 67. Special interest trails interested in following in Wales in the next few years, Percentage Bottom 11, All respondents



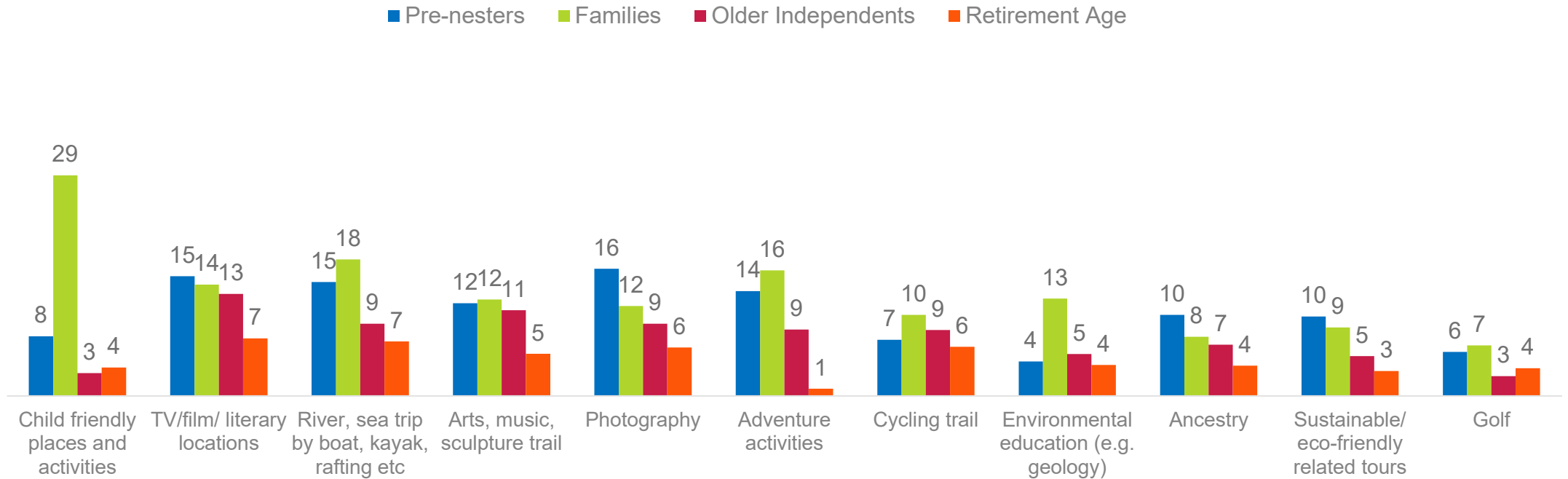
G4. And which, if any, of these types of long or short distance special interest trails would you be interested in following on a Wales holiday or short break in the next few years?

Base: All respondents n=1136

Special interest trails appeal on a Wales holiday or short break

- Perhaps unsurprisingly, ‘families’ index especially high for trails relating to ‘child friendly places and activities’, ‘environmental education’ and ‘adventure activities’. ‘Photography trails’ and ‘TV/film/literary locations’ have the highest interest amongst pre-nesters.
- Interest in ‘sustainable/eco-friendly related tours’ correlates with age – younger respondents more interested.

Figure 68. Special interest trails interested in following in Wales in the next few years, Percentage Bottom 11, All respondents



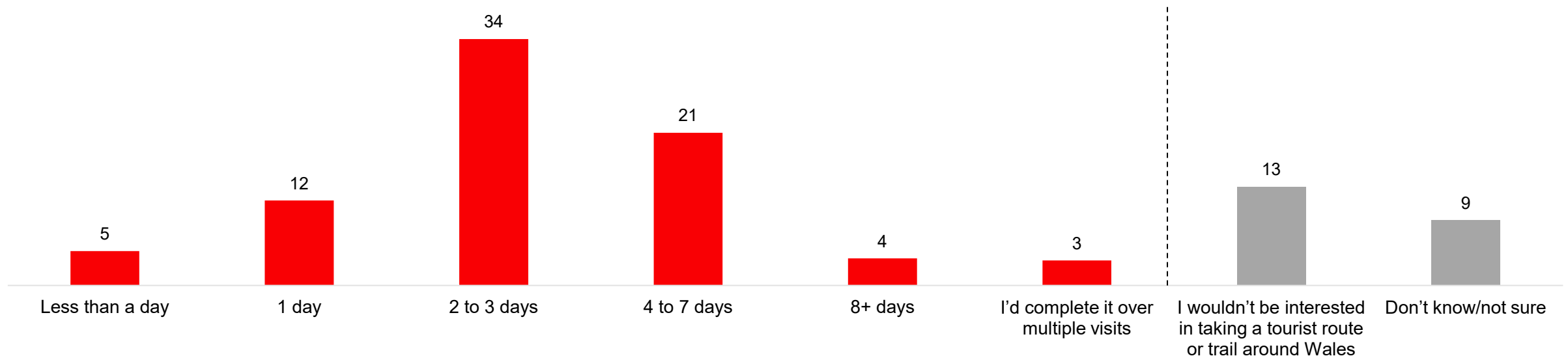
G4. And which, if any, of these types of long or short distance special interest trails would you be interested in following on a Wales holiday or short break in the next few years?

Base: Pre-nesters n=186; Families n=416; Older Independents n=312; Retirees n=222

Length of desired tourist route or trail around Wales

- 2-3 days is the leading preferred length of a tourist route or trail in Wales. 1 in 5 stated that the ideal time frame would be 4-7 days with 1 in 6 stating within a day or less. Long trips of over a week have very limited appeal and most people would prefer to follow a trail in a single trip rather than over multiple visits.

Figure 69. Length of desired route or trail, Percentage, All respondents



G5. How long would you be open to following a tourist route or trail around Wales?
Base: All respondents n=1136

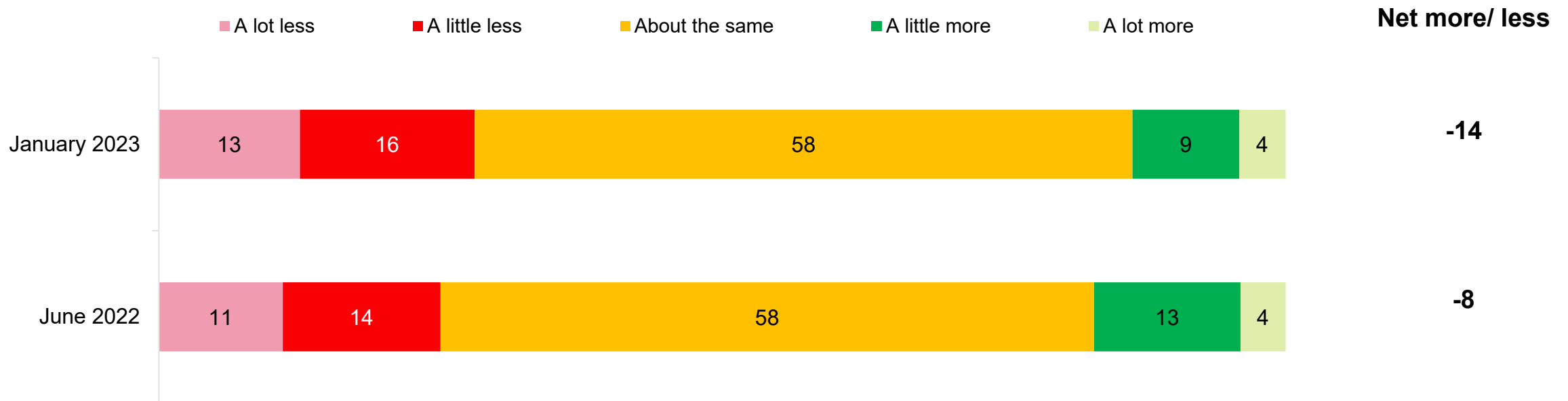
Marketing Impact



How much heard Wales talked about as a place to visit

- This is a measure of general exposure for Wales rather than specific marketing recall.
- Overall, the majority of the UK holiday market (58%) have heard 'about the same' level of Wales being talked about as a place to visit in last few months. However, a higher proportion claimed to have heard less than normal compared to the survey wave in June 2022, so at a net level, people in January 2023 have heard Wales talked about less than normal (net -14), compared to June 2022 (-8).

Figure 70. How much heard Wales talked about as a place to visit, Percentage, All respondents



H1. Compared to normal, how much have you heard Wales talked about as a place to visit over the last 3 months?

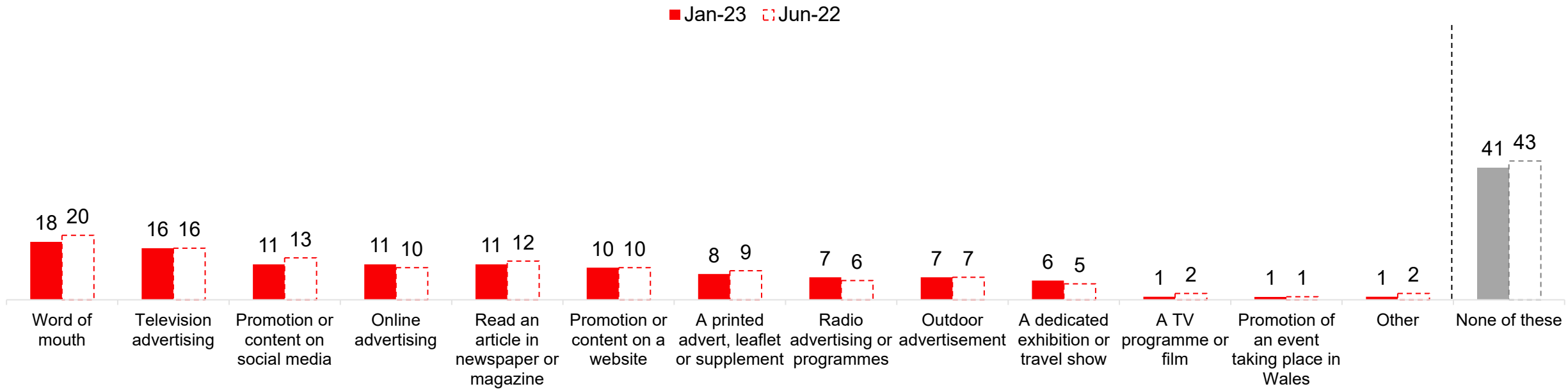
Base: All respondents n=1,136



Ways in which seen or heard about holidays in Wales

- Nearly 3 in 5 (59%) of the UK holiday market have seen or heard about Wales holidays via at least one information source in the last few months, similar to the previous survey in June 2022.
- Word of mouth is the leading source, followed closely by television advertising.
- The proportion that had seen or heard about holidays in Wales in recent months was higher amongst those that visited Wales in 2022 (80% having heard about Wales in at least one source) and those that probably/definitely intend to do so in 2023 (82% having done so)

Figure 71. Ways in which seen or heard about holidays in Wales in last few months, Percentage.



H2. Which, if any, of the following have you seen or heard about holidays in Wales in the last few months?

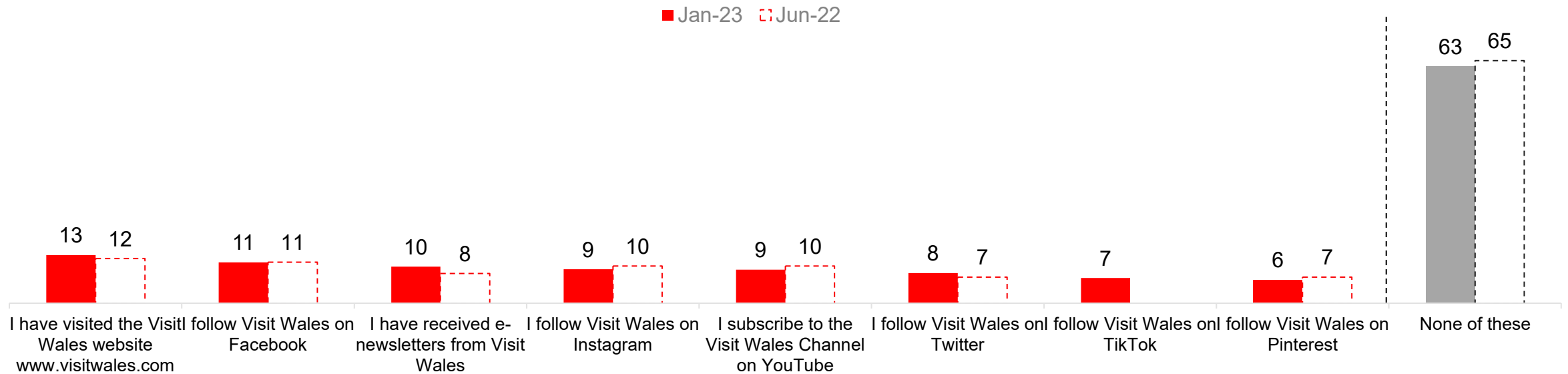
Base: All respondents n=1,136



Engagement with Visit Wales marketing and communications

- Around 2 in 5 (37%) of the UK holiday market claim to have engaged with one of Visit Wales digital marketing channels in the last 12 months. This is similar to engagement levels in June 2022.
- ‘Visiting the Visit Wales website’, ‘following/liking the Visit Wales Facebook page’ and receiving VW newsletters are the leading channels of contact with Visit Wales. On average, those that engaged with Visit Wales marketing and communication engaged with two channels.
- Notably, engagement with Visit Wales marketing is higher amongst those that visited Wales in 2022 (66% having engaged with at least one channel) and those that probably/definitely intend to do so in 2023 (63% having done so)

Figure 72. Engagement with Visit Wales marketing and communications, Percentage.



H8. More generally, which of the following apply to you and Visit Wales in the last 12 months?

Base: All respondents n=1,136



The Visit Wales Promotional Films tested within this survey

Autumn/Winter Adventurers



Autumn/Winter Families



Autumn/Winter Compilation



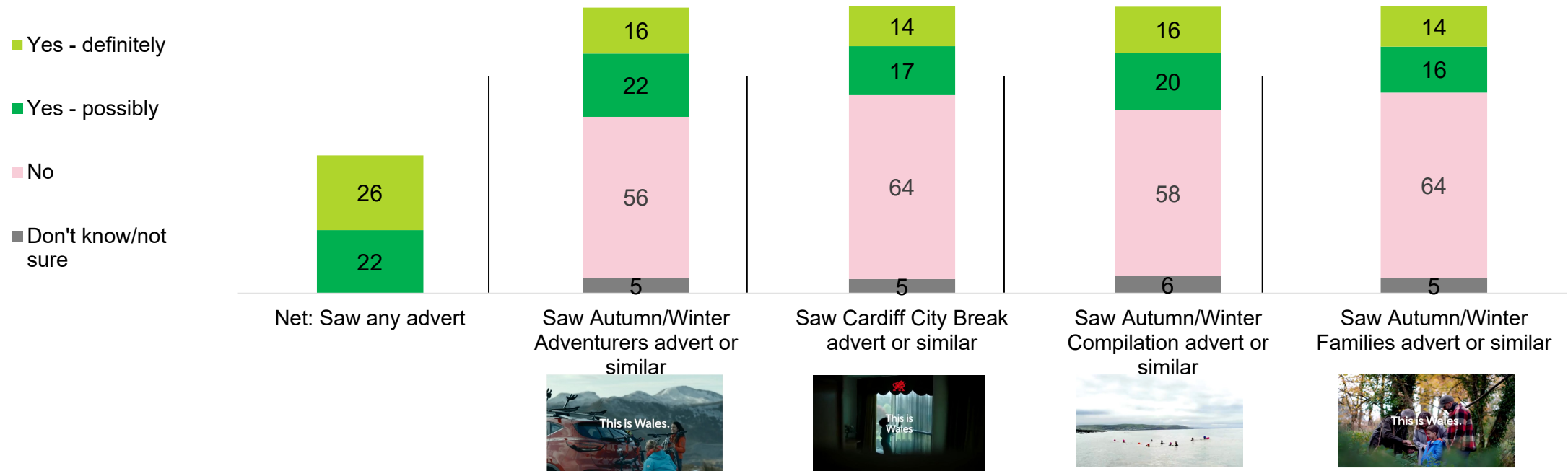
Cardiff City Break



Recall of Visit Wales promotional films

- In total, over 1 in 4 (26%) of the 'UK holiday market' had *definitely* seen one of the Visit Wales promotional films in the last few months. Recall is slightly higher for 'Autumn/winter Adventurers' and 'Autumn/Winter Compilation' Recall of 'Autumn/Winter Families' was lower, although doubles amongst the family life stage. Generally, families were more likely to recall each Visit Wales advert than other life stages. 'Definite recall' of at least one advert was highest in London/Greater London.

Figure 73. Recall of individual Visit Wales adverts, Percentage, By All respondents



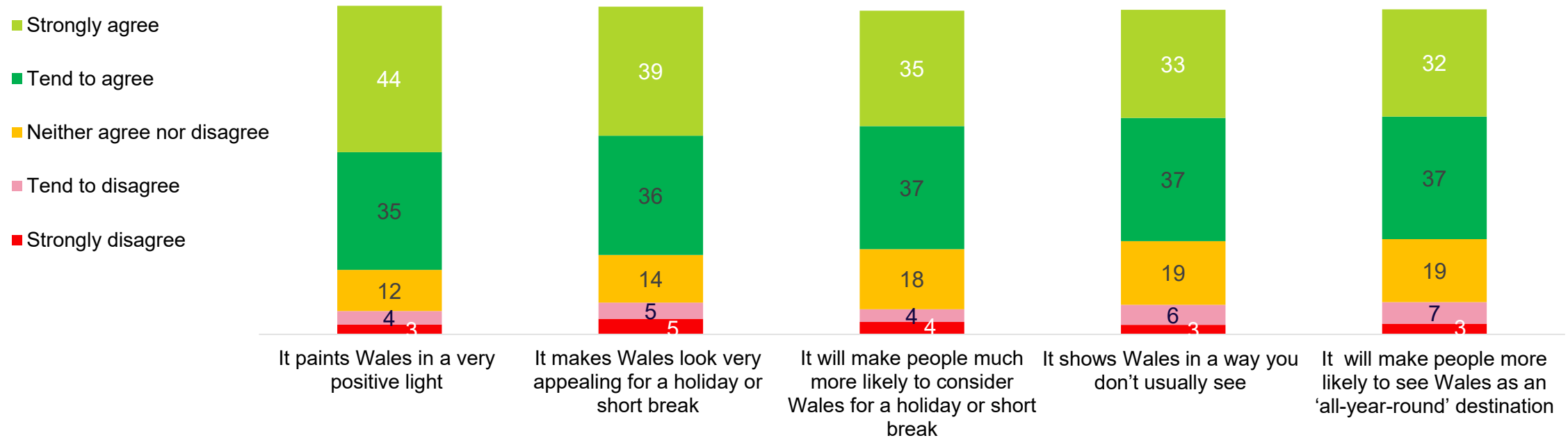
H4A-D. Do you recall seeing this film or something very similar in the last few months? You may have seen it on TV or online.

Base: All respondents n=1,136

Perceptions of promotional films overall

- Perceptions of the Promotional Films were broadly positive, a strong majority agreeing (and very few disagreeing) that they ‘paint Wales in a very positive light’ (79%), ‘make Wales look very appealing for a holiday or short break’ (75%), and ‘will make people more likely to consider Wales for a holiday or short break’ (72%). Similarly, there were positive impressions for ‘showing Wales in a way you don’t usually see’ and for ‘making people more likely to see Wales an ‘all-year-round’ destination’.
- Perceptions are generally more positive amongst those who intend to visit Wales than those that don’t intend to.

Figure 74. Perceptions TV adverts overall, Percentage, All respondents



H5. Now thinking of the films we have just shown you as one whole marketing campaign, how much do you agree or disagree with the following statements?

Base: All respondents n=1,136

Descriptive statements that come out from the promotional films

- The adverts scored highly for communicating 'incredible scenery and landscapes' (46%), 'lots of activities and things to do' (41%) and 'great places to explore off the beaten track' (40%). Around 1 in 3 stated that the adverts show 'an appealing mix of countryside and towns/cities', 'a destination rich in history and heritage' and 'famous landmarks and visitor attractions' about Wales.

Figure 75. Descriptive statements that come out from TV advert, Percentage, Top 10, All respondents



H6. Which, if any, of these descriptive statements about Wales would you say come across clearly from the adverts you have seen?

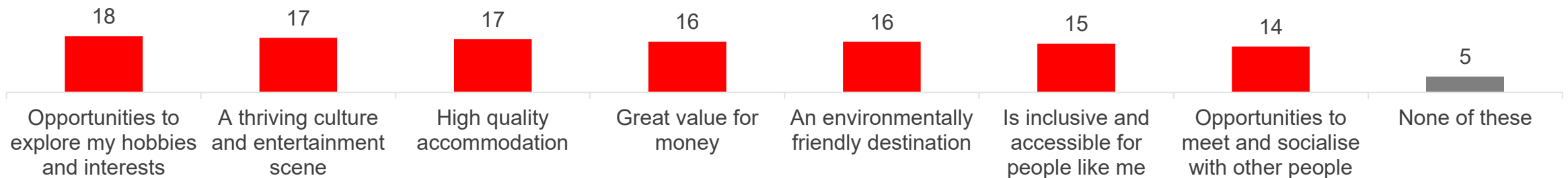
Base: All respondents n=1,136



Descriptive statements that come out from the promotional films

- The adverts scored lowest for communicating Wales 'is inclusive and accessible for people like me' and the 'opportunities to meet and socialise with other people'.
- There are some other notable factors which this research has identified as important for people deciding where to take a holiday that are less associated with the promotional films. These are 'great value for money', 'high quality accommodation', 'people are welcoming' and 'places renowned for their food and drink'

Figure 76. Descriptive statements that come out from TV advert, Percentage, Bottom 8, All respondents



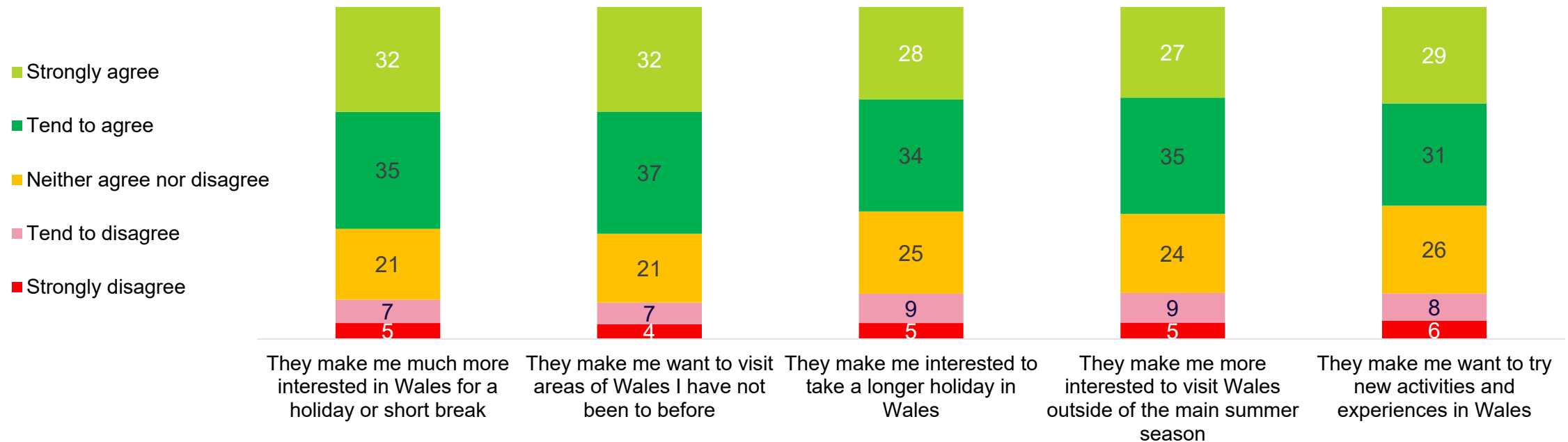
H6. Which, if any, of these descriptive statements about Wales would you say come across clearly from the adverts you have seen?

Base: All respondents n=1,136

Perceptions of Wales that come out from the promotional films

- Around 2 in 3 strongly/tend to agree that the promotional films make them 'much more interested in Wales for a holiday or short break' – equally high amongst those that have never visited before. The promotional films also generated a positive impression for other key strategic objectives to encourage visitors to visit all parts of Wales, to take longer holidays, to visit all year round and to try new activities and experiences.
- Perceptions are most positive amongst those that took a trip in Wales in 2022 and intending to do so in 2023.

Figure 77. Perceptions TV adverts overall, Percentage, All respondents



H7. Now thinking about the impact the campaign has had on you personally, how do these films and adverts impact your perceptions of Wales as a holiday or short break destination?

Base: All respondents n=1,136



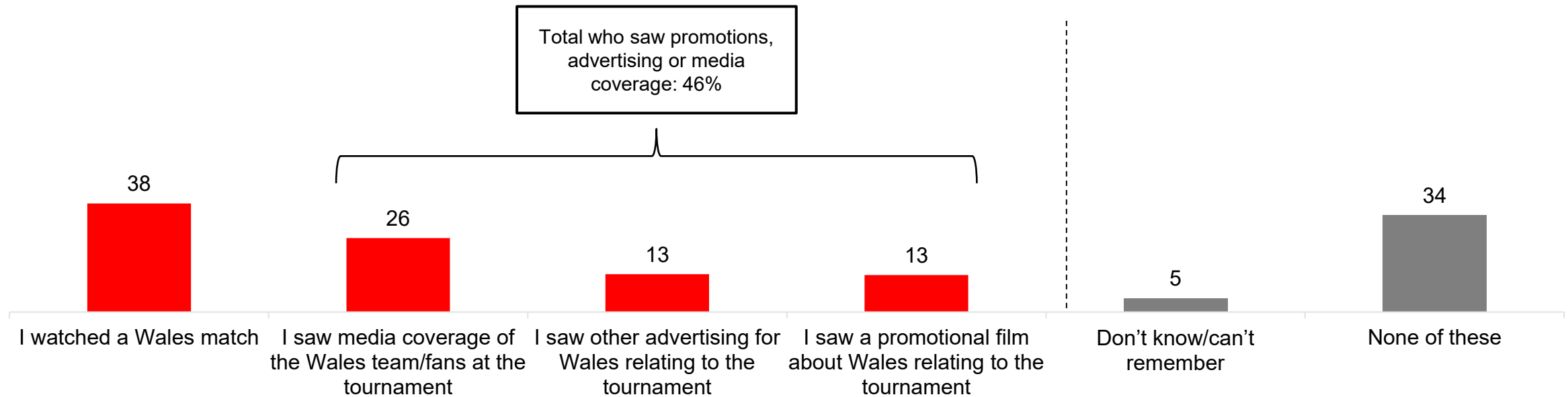
Promotion and awareness of Wales from Football World Cup (November 2022)



How much seen about Wales during the World Cup

- 2 in 3 people stated they either watched a Wales football match or saw some form of media coverage about Wales during the Football World Cup which took place in November-December 2022.
- Almost 2 in 5 (38%) stated they watched a Wales match during the tournament (this could have been in person or on TV).
- 46% stated they saw media coverage or promotional films or other advertising of Wales in relation to the tournament.
- Welsh residents were more likely to have seen all forms of coverage of Wales during the tournament, whilst families were more likely than retirees or older independents to have seen advertising or a promotional film. Engagement with coverage of Wales was also higher amongst those with a connection to Wales other than nationality.

Figure 78. Wales promotions or coverage in the Men's Football World Cup, Percentage, All respondents



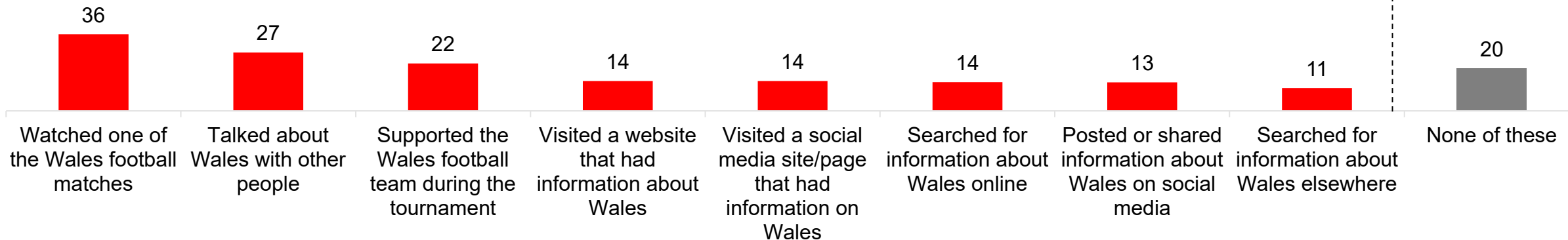
11. Which, if any, of the following did you see or do in relation to Wales in the Men's Football World Cup?

Base: All respondents n=1,136

Engagement with Wales as a result of promotions

- In total 80% of respondents engaged with Wales at some level as a result of watching football coverage or seeing promotions of Wales during the World Cup.
- The main form of engagement was to either watch and support the team at the tournament or to talk about Wales with others.
- Watching a Wales match and supporting the team were unsurprisingly higher amongst Welsh residents.
- A lower, but still notable, proportion of those who saw Wales featured at the World Cup actively engaged with different digital and social media channels.

Figure 79. Engagement with Wales in the Men's Football World Cup, Percentage, All respondents seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup



12. Which, if any, of the following did do as a result of seeing the promotions or coverage of Wales during the World Cup?

Base: All respondents that have seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup n=707



Llywodraeth Cymru
Welsh Government



Perceptions of Wales during the World Cup

- Around half of respondents stated Wales' coverage and promotion in the World Cup made them more positive about Wales.
- Families report the highest positive feelings with Wales at 63%.

Figure 80. Perceptions of Wales in the Men's Football World Cup, Percentage, All respondents seen promotion or coverage of Wales in the World Cup

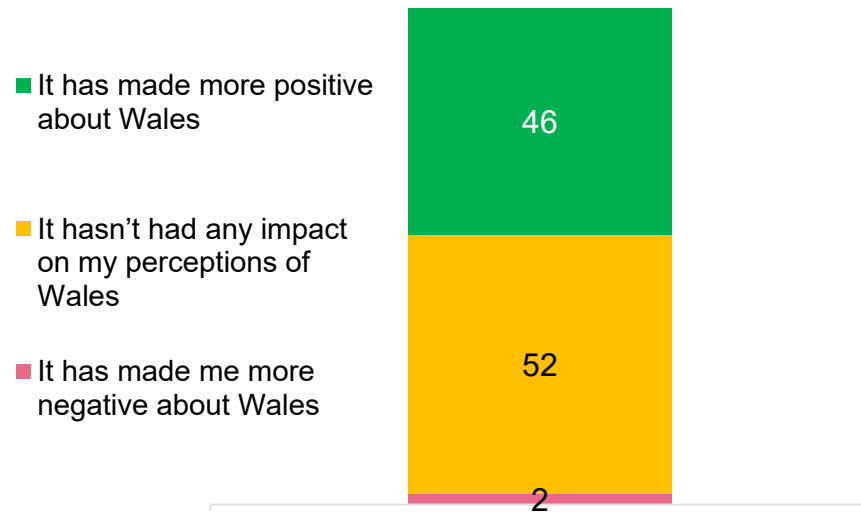
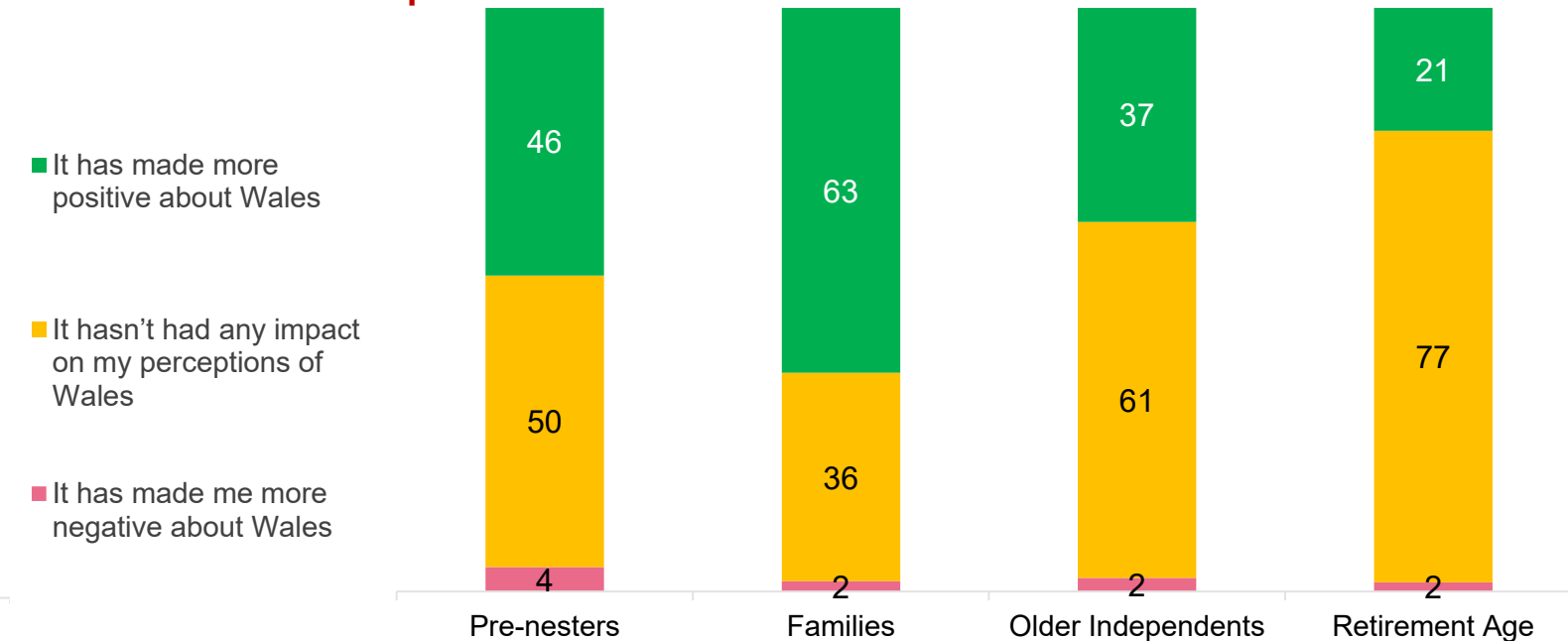


Figure 81. Perceptions of Wales in the Men's Football World Cup by LIFE STAGE, Percentage, All respondents seen promotion or coverage of Wales in the World Cup



13. How, if at all, has Wales' coverage and promotion in the World Cup impacted your perceptions of Wales?
 Base: All respondents seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup n=707n=728; Pre-nesters n=122; Families n=302; Older Independents n=170; Retirees n=134



Appendix



Statistical significance

The table below outlines the statistical reliability of survey responses. The examples used are not exhaustive but have been selected to illustrate varying confidence at a range of different sample sizes.

Base	Survey finding of...		
	5 / 95%	20 / 80%	50 / 50%
Total Sample (1,136)	+/-1.3	+/- 2.3%	+/- 2.9%
Wales 2023 intenders (616)	+/-1.7	+/- 3.2%	+/- 3.9%
Non-Wales intenders (520)	+/- 1.9%	+/- 3.4%	+/- 4.3%