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Tourism Market Demand Report: UK March 2020

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

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Visit Wales

Market Study
Summary Report

UK

March 2020

Produced by BVA BDRC

Contents

1. Introduction

Understanding this report

1.1 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 broadly looks at:

- General holiday and short break intentions for the upcoming 12 months
- The factors influencing holiday and short break choice
- Types of destination and experiences favoured on holidays and breaks in the UK
- Awareness, perceptions and consideration of destinations within the UK for a holiday or short break
- Perceptions of Wales as a holiday or short break destination
- Planning and booking sources for trips to Wales
- Engagement with Visit Wales information channels
- Profiling and demographics

1.2 This report is the first in a series of regular reports which will be issued following each wave of the study. The summary reports will outline the key findings from each wave, with a full annual report. This report outlines the findings from the **UK market.**

Methodology

1.3 Respondents were contacted through an online panel which could be completed via desktop or mobile device.

1.4 Fieldwork took place from 20th February to 2nd March 2020, prior to the main COVID-19 outbreak and restrictions in the UK.

1.5 There were 1,150 completed surveys. The first 1,000 responses were nationally representative of the UK's domestic holiday-taking population. A boost of 150 surveys were then conducted amongst residents from Wales. The final data tables were weighted to be representative of the UK's domestic holiday-taking population.

1.6 The survey took 20 minutes to complete on average

Sample definition

1.7 To qualify for the survey, participants had to fulfil the following criteria:

- Must be a holiday or short break decision-maker
- Must be *seriously* considering taking a holiday or short break in the UK in the next 12 months.

Headline Findings

29	-18	-18
Percentage point	Percentage point	Percentage point
Net increase in expected trips in the UK in next 12 months	Net decrease in expected trips to Europe in next 12 months	Net decrease in expected trips to rest of world in next 12 months

Top reasons for *fewer* trips in the UK

- **30%** Unreliable weather
- **28%** Personal circumstances
- **27%** Places abroad more appealing

Top reasons for *more* trips in the UK

- **43%** Want to see more of what the UK has to offer
- **43%** Travel is easier
- **34%** Trips are cheaper

Most likely to consider a trip in the UK for:

Scenic coastline and harbours **50%**

Cities and large towns **49%**

Historic and heritage towns **48%**

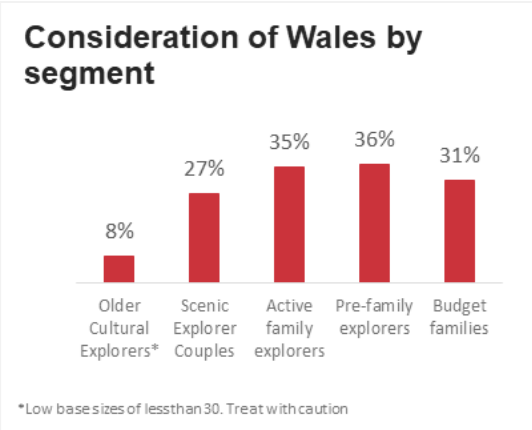
Scenic countryside & villages **46%**

Wales is most associated with scenic countryside and villages

Figure 1: Relationship with Holiday Destinations in the UK

	Wales	South Coast	West Country	Yorkshire
Previous visits	63%	61%	66%	55%
Familiarity	36%	45%	43%	39%
Consideration	26%	27%	33%	24%
	Lake District	**Scotland**	**Peak District**	**Ireland**
Previous visits	54%	60%	41%	44%
Familiarity	36%	35%	29%	20%
Consideration	26%	29%	15%	20%

Figure 2: Key demographics of the UK market considering a trip to Wales



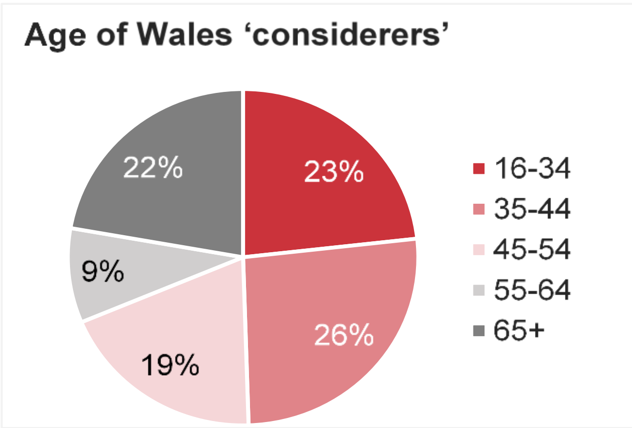


Figure 3

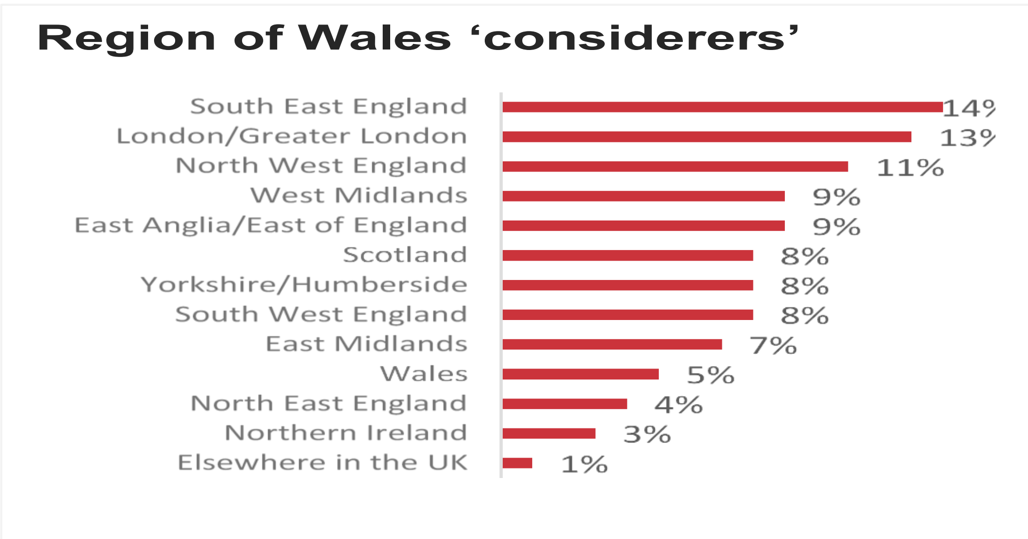


Figure 4

Top 5 reasons for not visiting Wales

26% Other places more appealing

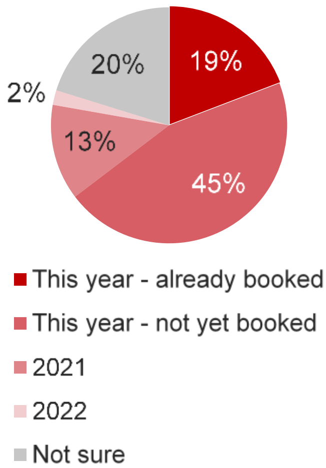
25% Too far to travel

23% Weather conditions are off-putting

21% Been before and wanted to try somewhere else

20% Difficult to travel to and around Wales

When planning next trip to Wales (% of Wales considerers)



Top 3 places intending to visit

29% Snowdonia

25% Llandudno and Colwyn Bay

21% Cardiff

Planned length of trip to Wales amongst 'Wales considerers'

39% Plan on taking a short break to Wales (1-3 nights)

60% Plan on taking a holiday to Wales (4+ nights)

5 nights Average length of planned trip to Wales (nights)

Figure 5

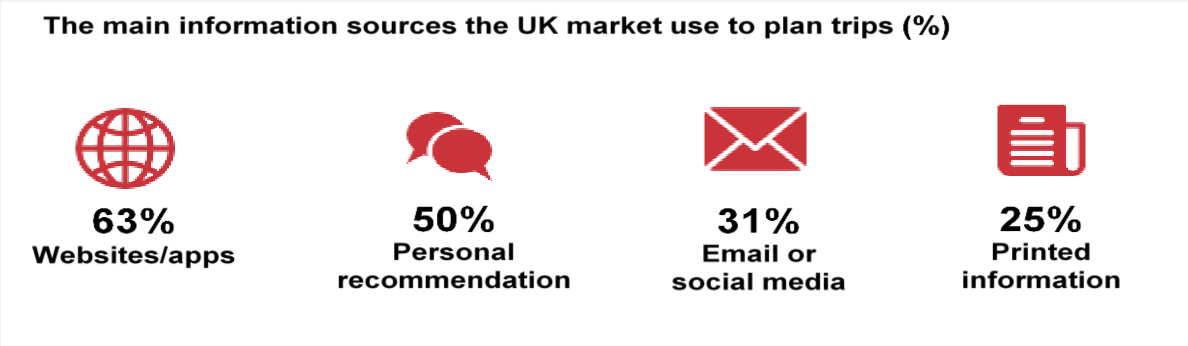


Figure 6

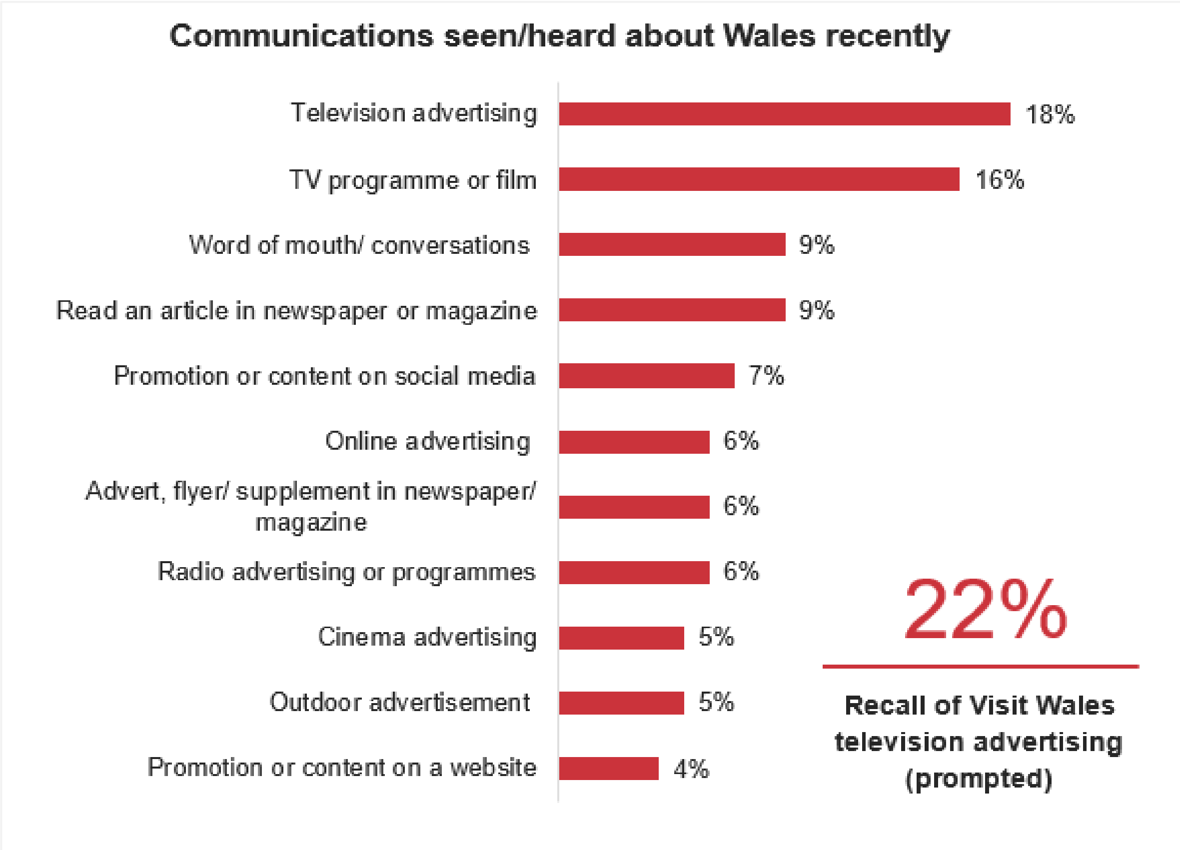
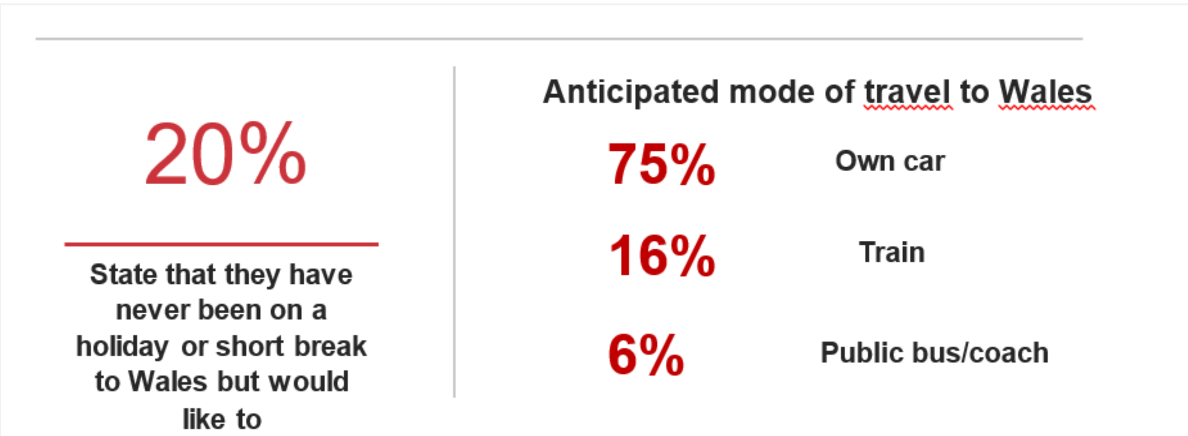


Figure 7



3. Influences on holiday & short break behaviour

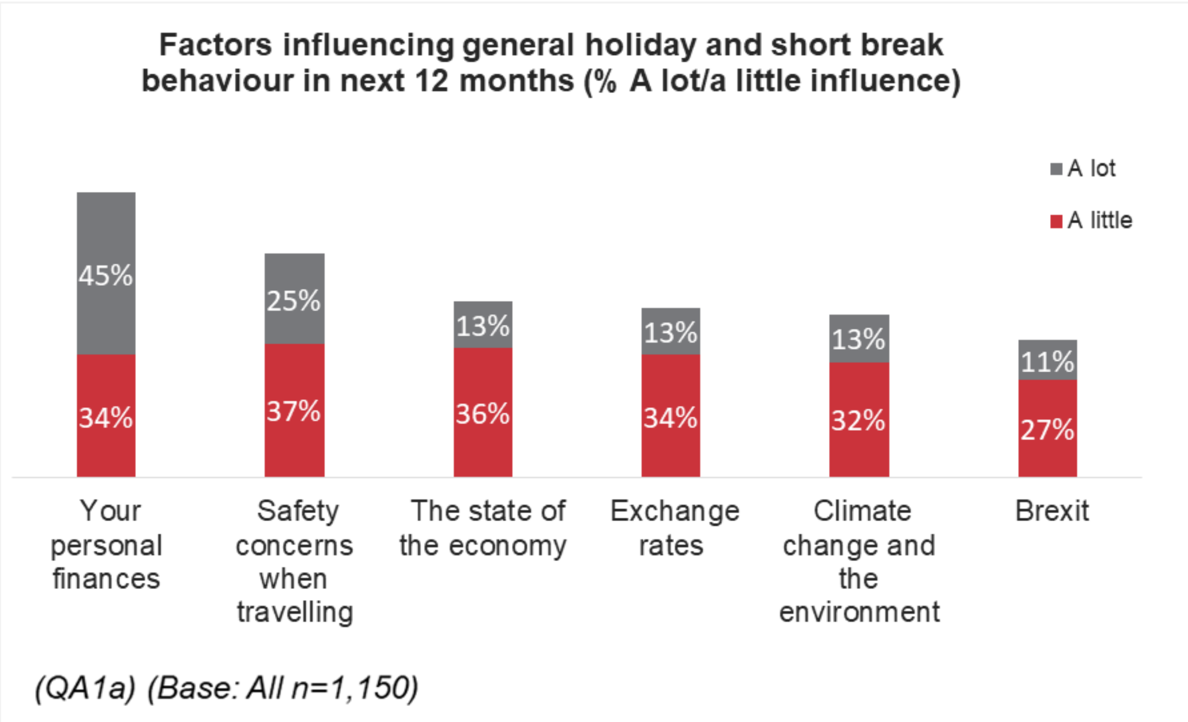
Main influences on holiday and short break behaviour

3.1 ‘Personal finances’ is the factor most likely to influence the UK market’s holiday and short break decision-making in 2020 (80% citing it as having a lot/little influence), followed by ‘concerns over safety’ (62%). Linked to personal finances, ‘the state of the economy’ (49%) and ‘exchange rates’ (47%) are also important.

3.2 ‘Climate change and the environment’ is about as influential as exchange rates, nearly half citing them as an influence. Brexit was regarded as an influence for nearly 4 in 10 (38%), although only 11% regard it was having ‘a lot’ of influence.

3.3 Coronavirus was not spontaneously mentioned by respondents but this is likely due to the timing of the survey before the virus escalated on a global scale.

Figure 8



Intention to take holidays/short-breaks

3.4 Notably, respondents in the UK domestic tourism market were significantly more likely to be anticipating taking more domestic trips in the next 12 months, than fewer (38% compared to 9%, with a net of +29). The opposite is the case for holidays and short breaks to Mainland Europe and Rest of the World. This research took place before COVID-19 took hold in Europe, so this trend is likely to have become even more exaggerated.

3.5 ‘Active family explorers’ (+36), ‘pre-family explorers’ (+32) and ‘older cultural explorers (also +32) were the Visit Wales priority segments most likely to state they will take more net trips in the UK in the next 12 months.

3.6 Amongst Visit Wales’ non-priority segments, ‘budget families’ (+37%) were most likely to intend to take more trips in the UK.

Figure 9

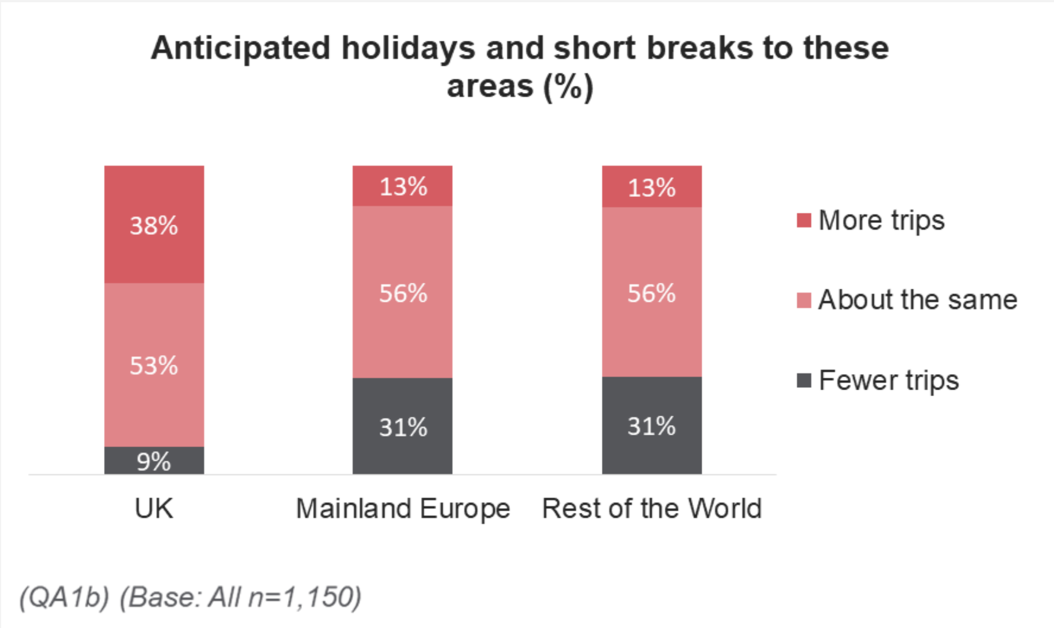


Figure 10: Anticipated holidays in UK by region of residence and segment (%)

	Wales	Scot.	North West	York s.	East Mids	West Mids	East Eng.	London	South East	South West
More trips	36%	40%	35%	36%	40%	43%	41%	40%	36%	34%
About same	57%	53%	57%	55%	55%	45%	51%	46%	56%	61%
Fewer trips	7%	7%	8%	10%	6%	12%	9%	14%	8%	5%

	Older cultural explorers (small base size under 30 – treat with caution)	Scenic explorer couples	Active family explorers	Pre-family explorers	Budget families
More trips	32%	23%	47%	40%	44%
About the same	68%	74%	41%	52%	49%
Fewer trips	0%	2%	11%	8%	7%

Reasons for taking more trips in the UK

3.7 Of the 38% of the UK domestic market anticipating taking more trips in the UK, the strength of the UK's product, convenient access and financial considerations were the overarching reasons.

3.8 The leading reason was 'I want to see more of what the UK has to offer' (cited by 43%), followed by 'it's easier to travel in the UK than to travel abroad' (also 43%) and 'trips in the UK are cheaper than going abroad' (34%).

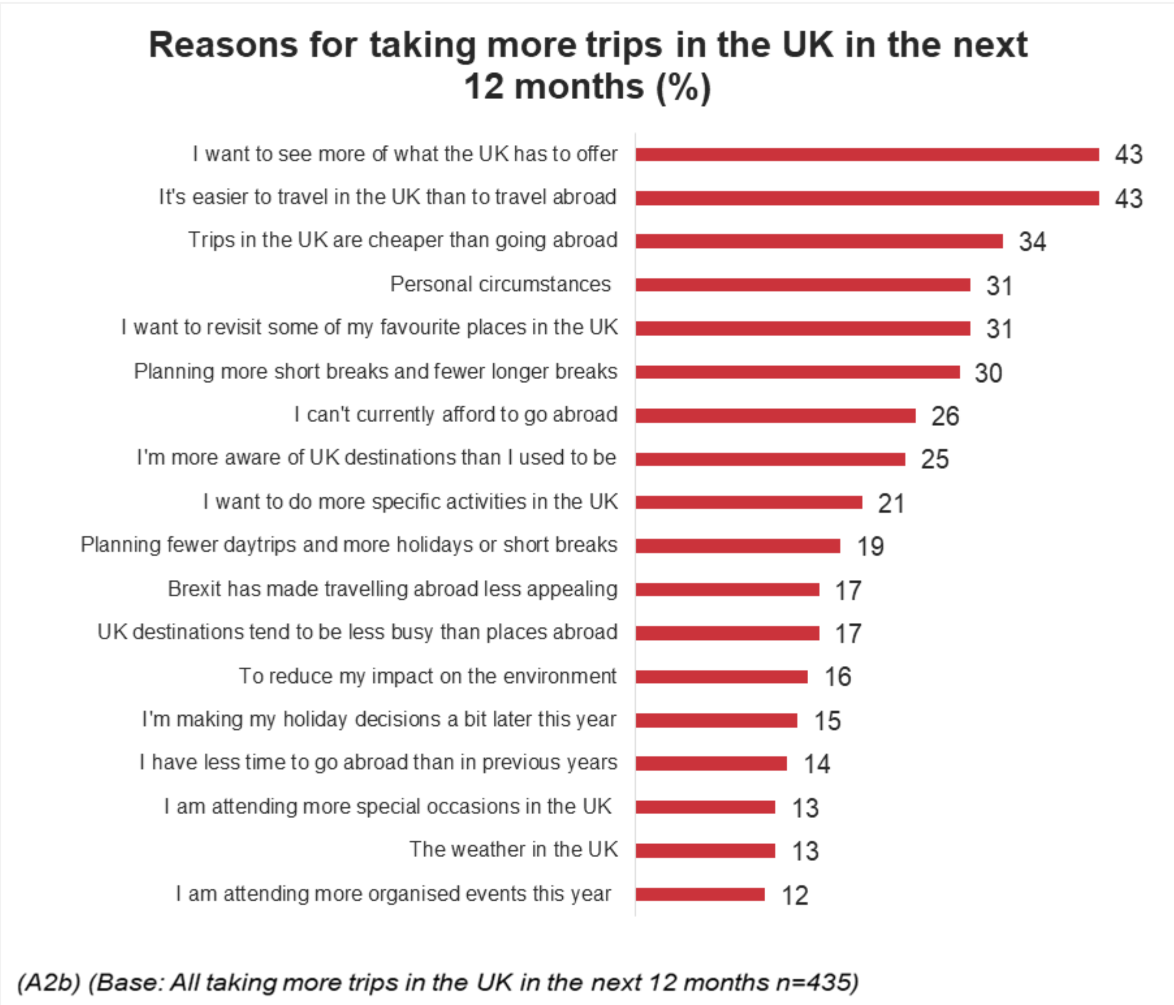
3.9 Financial considerations were evident elsewhere, 26% stating they can't currently afford to go abroad. Overall, financial reasons encouraged more trips in the UK for 50% of these respondents.

3.10 There is a mix of people looking to visit new and familiar places, underlining the importance of presenting established, new, nostalgia and discovery within destination communications.

3.11 For around 3 in 10, the increase in domestic trips means swapping longer breaks for a higher number of short breaks. This may mean that the number of nights stayed in the UK will not increase at the same rate as trips.

3.12 Brexit and the environment are less prominent drivers for taking more domestic holidays, although are a driver for around 1 in 6.

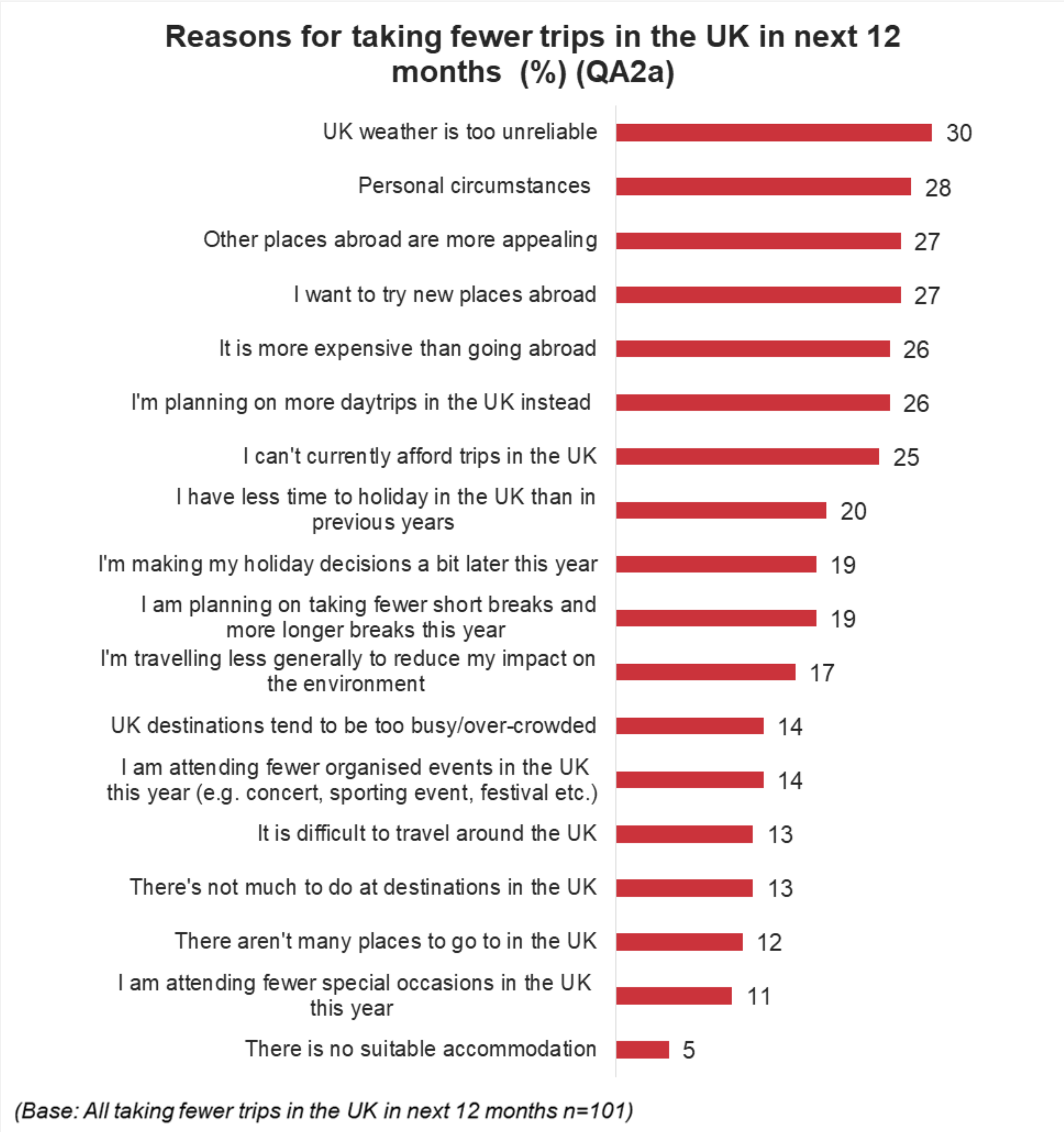
Figure 11



Reasons for taking fewer trips in the UK

3.13 Of the 9% of Britons that anticipated taking fewer trips within the UK in the next 12 months, 'the weather' was cited as the main reason (by 30%), followed by 'personal circumstances' (28%) and 'other places abroad are more appealing' (27%). 1 in 4 (26% which amounts to just 2% of the whole domestic tourism market) cited 'the UK is more expensive than abroad' as a reason for taking fewer domestic trips.

Figure12



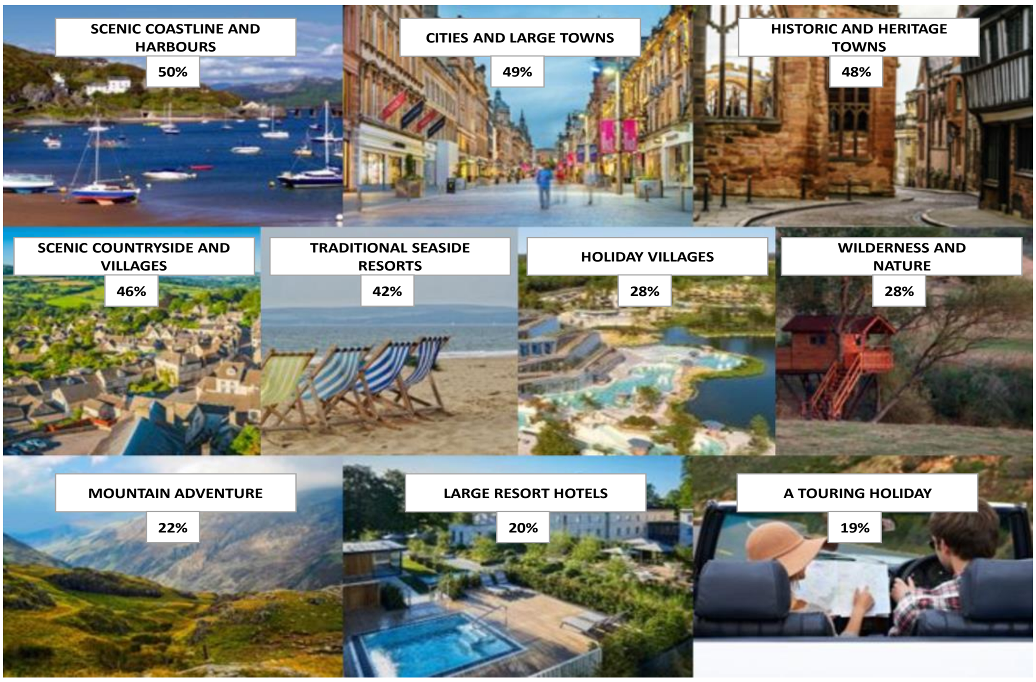
Types of holiday destinations being considered in the UK

3.14 A range of types of UK holiday destinations appeal to the UK market, although five types stand out more than any other. ‘Scenic coastline and harbours’ are the most preferred (50% considering this), followed closely by ‘cities and large towns’ (49%), ‘historic and heritage towns’ (48%), ‘scenic countryside and villages’ (46%) and ‘traditional seaside resorts (42%). Netted together, urban areas are considered for 68% of the UK market; seaside or coastline for 66%; and rural areas (countryside and villages, wilderness and nature and mountain adventure) for 58%. Coastal and rural areas combined are appealing for 83%, underlining the opportunity for the Year of Outdoors to showcase all of Wales’ outdoor assets.

3.15 There was some variation across Visit Wales’ priority segments, although ‘scenic coastlines and harbours’ was a top three influence for each. ‘Older cultural explorers’ indexed significantly higher for ‘historic and heritage towns’ (78% compared to 48% on average), a type of destination that was also most popular for ‘pre-family explorers’ (68%). For ‘scenic explorers’, ‘scenic coastline and harbours’ indexed highest (78% compared to 50% on average). For ‘active family explorers’, ‘holiday villages/centres was the most preferred (53% considering this type of trip compared to 28% average).

3.16 Wales has varying associations with the top five most considered destination types. 54% strongly associate Wales with ‘scenic countryside and villages’, 43% with ‘historic and heritage towns’, 41% with ‘scenic coastline and harbours’, 31% with ‘traditional seaside resorts and 25% with ‘cities and large towns’. However, despite some strong associations, Wales is not the *most* associated with any of the destination types (see table below).

Figure 13: Types of holiday destinations considered for UK trip (%)



(QB1) (Base: All n=1,150)

Figure 14: Types of holiday destinations considered for UK trip (% by segments)

Three most preferred destination types per segment in red

	Older cultural explorers (small base size under 30 – treat with caution)	Scenic explorer couples	Active family explorers	Pre-family explorers	Budget families
Scenic coastline and harbours	**66%**	**78%**	**52%**	**67%**	**54%**
Cities and large towns	**65%**	34%	39%	60%	51%
Historic and heritage towns	**78%**	**71%**	39%	**68%**	44%
Scenic countryside and villages	60%	**69%**	**52%**	**63%**	46%
Traditional seaside resorts	36%	32%	48%	56%	**62%**
Holiday village/centre	11%	8%	**53%**	23%	**53%**
Wilderness and nature	16%	48%	35%	31%	26%
Mountain adventure	32%	22%	45%	27%	23%
Large resort hotel	11%	11%	25%	22%	23%
A touring holiday	35%	28%	24%	21%	14%

Figure 15: Destination type associations for each area of the UK

Table below shows associations of destination types with each area. For example, 41% strongly associate Wales with scenic coastline and harbours. Top 2 associated area for each destination type highlighted in red.

	Scenic coastline and harbours	Cities and large towns	Historic and heritage towns	Scenic country and villages	Traditional seaside resorts	Holiday village/ centre	Wilderness and nature	Mountain adventure	Large resort hotel	Touring holiday
Wales	**41%**	25%	**43%**	54%	**31%**	18%	39%	51%	14%	35%
Scotland	35%	**54%**	**61%**	54%	11%	9%	**56%**	**66%**	14%	**63%**
Ireland	34%	**38%**	**43%**	47%	12%	9%	35%	20%	10%	**50%**
West Country	**72%**	16%	42%	**59%**	**68%**	**32%**	33%	10%	**29%**	39%
The Lake District	17%	7%	29%	**60%**	8%	**29%**	**52%**	**52%**	**18%**	41%

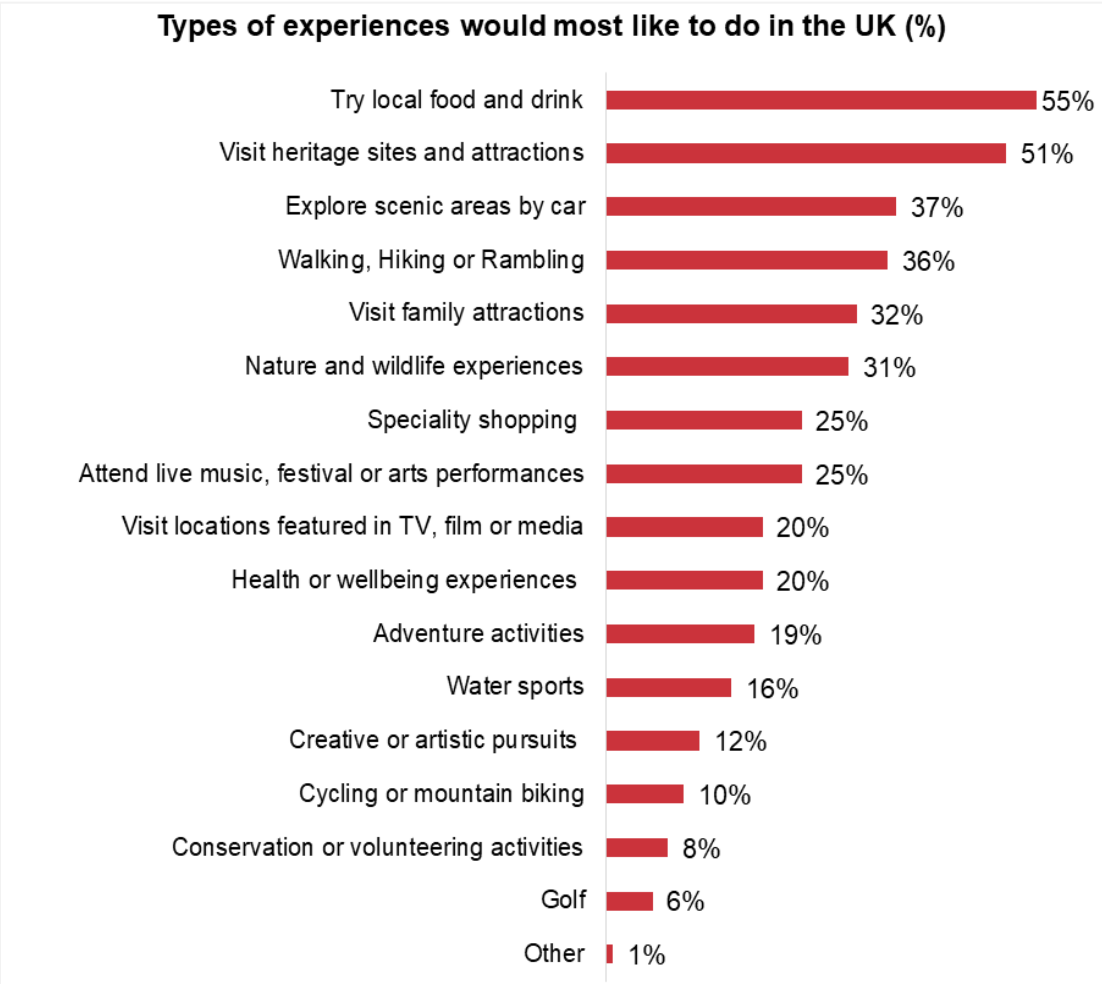
Types of experiences being considered in the UK

3.18 The UK's domestic holiday market is most likely to be attracted to 'trying local food and drink' (55%) and 'visiting heritage sites and attractions' (51%) whilst on a holiday or short break in the UK. There is also a clear desire for exploration and the outdoors – nearly 2 in 5 interested in exploring scenic areas by car (37%) and walking, hiking and rambling (36%), around 3 in 10 (31%) interested in nature and wildlife experiences and 1 in 5 in adventure activities (19%) and water sports (16%).

3.19 Although not high individually, activities that specifically mention exercise (walking hiking or rambling, cycling, water sports, golf and adventure activities) are of interest for 55% of the market.

3.20 'Visiting heritage sites and attractions' is the type of experience most of Visit Wales' priority segments would most like to do, with the exception of 'active family explorers' for whom 'trying local food and drink' and 'family attractions' are most important. 'Walking, hiking or rambling' indexed higher for each of Visit Wales' priority segments than any non-priority segment. The Active Family Explorer segment has higher levels of interest across a range of experiences.

Figure 16



(QB3) (Base: All n=1,150)

Figure 17: Types of holiday experiences would most like to do on a UK trip (%)

*Top five most preferred experiences by segment in **bold***

	Older cultural explorers* (small base size under 30 – treat with caution)	Scenic explorer couples	Active family explorers	Pre-family explorers	Budget families
Try local food and drink	**52%**	**55%**	**69%**	**53%**	**56%**
Visit heritage sites and attractions	**84%**	**78%**	**47%**	**65%**	**46%**
Explore scenic areas by car	**68%**	**71%**	41%	**39%**	34%
Walking, Hiking or Rambling	**48%**	**57%**	**49%**	**46%**	**41%**
Visit family attractions	6%	17%	**55%**	26%	**66%**
Nature and wildlife experiences (e.g. bird watching)	**34%**	**50%**	**47%**	34%	**39%**
Speciality shopping (e.g. for something that you do not buy regularly)	7%	14%	29%	27%	23%
Attend live music, festival or arts performances	18%	12%	30%	**43%**	23%
Visit locations featured in TV, film or media	14%	20%	37%	35%	17%
Health or wellbeing experiences (e.g. spa, massage etc.)	14%	17%	30%	39%	27%
Adventure activities	9%	9%	37%	17%	25%
Water sports (e.g. swimming, surfing, windsurfing etc.)	11%	12%	29%	16%	27%
Creative or artistic pursuits (e.g. photography, drawing etc.)	5%	15%	21%	13%	10%
Cycling or mountain biking	6%	10%	16%	9%	11%
Conservation or volunteering activities	-	6%	13%	19%	7%
Golf	5%	4%	8%	5%	4%

Influential factors in choosing UK trips

3.21 Financial considerations are the most prominent when choosing a holiday or short break in the UK, 59% citing 'great value for money' as an influential reason. This is followed by the UK's natural beauty (45% stating 'scenery and landscape' as an influencing factor) and heritage (39% citing 'a destination rich in history and heritage' and 37% famous landmarks and attractions – 53% when netted together). Environmental factors are lower down the list, although still influential for 20%.

3.22 Not all of the UK's domestic holidaymakers are considering saving money on their trips, about a third (35%) citing 'high quality accommodation' as an influence. Combined with 'accommodation with charm/character', accommodation is a driver for half of the market, more important than for the Ireland and German markets. Other factors were also mentioned including 'lots of activities and things to do' (by 35%).

3.23 Amongst Visit Wales' priority segments, 'rich history and heritage' was the most important influence for 'older cultural explorers' (81% compared to 39% on average), 'Scenery and landscapes' was the most important for 'scenic explorers' (84% vs. 45%), 'great value for money' for 'pre-family explorers' (64% vs. 59%) and 'active family explorers' (57% vs. 59%); lots of activities and things to do also indexed highly for this segment (46% vs. 35% on average). Compared to other segments, 'somewhere you can visit all year round' was more important for 'older cultural explorers' (47% vs. 34% on average) and 'scenic explorer couples' (48%).

Figure 18

Figure 19: Most influential factors on taking a UK trip (% by segment)

Five most influential factors by segment in red

	Older cultural explorers	Scenic explorer couples	Active family explorers	Pre-family explorers	Budget families
Great value for money	42%	**61%**	**57%**	**64%**	**75%**
Incredible scenery and landscapes	**70%**	**84%**	**44%**	**58%**	**44%**
A destination rich in history and heritage	**81%**	**72%**	37%	52%	31%
Famous landmarks and visitor attractions	**55%**	**58%**	32%	53%	32%
High quality accommodation	**51%**	45%	**39%**	**40%**	33%
Lots of activities and things to do	6%	27%	**46%**	**34%**	**56%**
People that are very welcoming	29%	43%	27%	41%	**34%**
Somewhere you can visit at all times of the year	**47%**	48%	33%	38%	**40%**
Accommodation with charm and character	44%	**57%**	**38%**	**47%**	30%
Great places to explore off the beaten track	14%	56%	33%	36%	26%
An authentic cultural experience	15%	29%	21%	36%	15%
An environmentally friendly destination	25%	19%	35%	27%	27%
Opportunities to explore my hobbies and interests	11%	20%	27%	40%	17%
A thriving culture and entertainment scene	7%	16%	28%	24%	17%
Opportunities to meet and socialise with other people	17%	14%	18%	16%	15%

4. Destination consideration

Familiarity with selected destinations

4.1 Over a third (36%) of the UK holiday market feel that they know Wales very/fairly well, lower than the proportion that feel this about The South Coast of England, The West Country and Yorkshire, but higher than Scotland, The Peak District and Ireland.

4.2 Of Visit Wales' priority segments, familiarity with Wales is highest amongst 'scenic explorers' (49% compared to 36% on average) and 'active family explorers' (44%). It is lowest amongst 'older cultural explorers' (30%) and 'pre-family explorers' (31%).

Figure 20

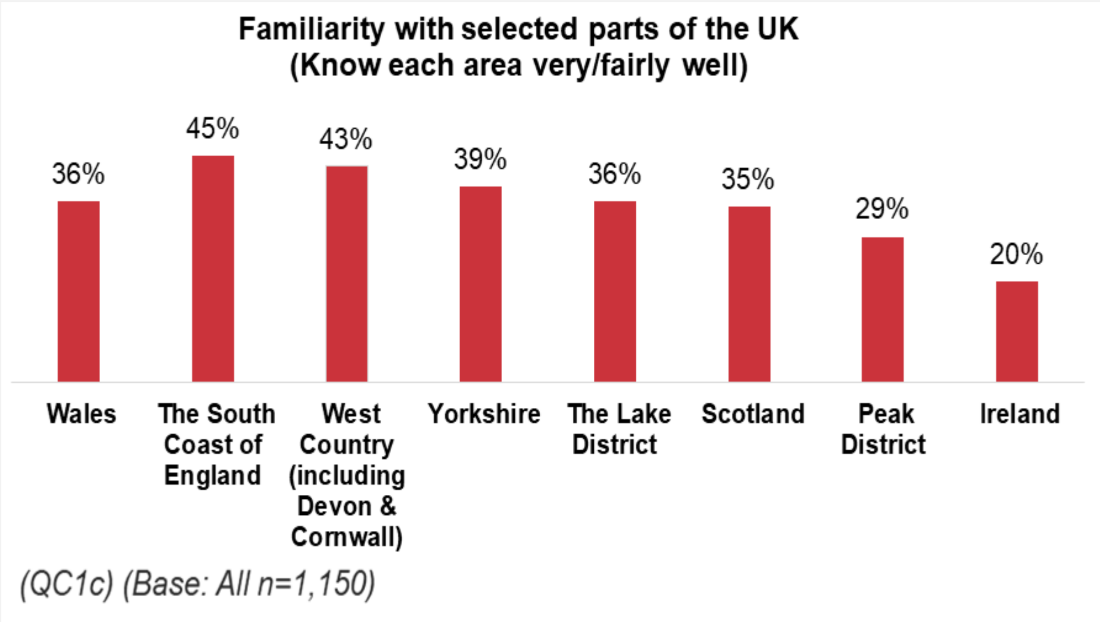


Figure 21: Familiarity with each destination by region of residence (%)

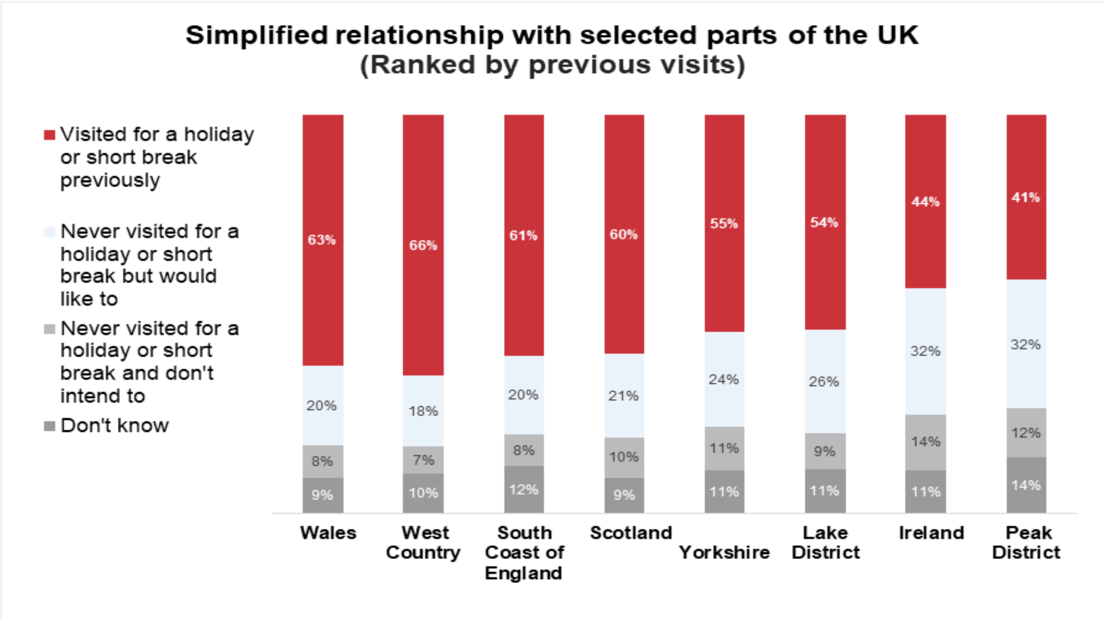
(Region of residence is shown along the top red row, destination in the grey vertical column – e.g. 43% of Wales residents are very/fairly familiar with the South Coast of England)

Destination	Region of Residence									
	Wales	N. East	North West	York	East Mid	W. Mid	East Eng.	Lond	South East	S. West
Wales	95%	17%	47%	24%	32%	57%	26%	39%	28%	36%
South Coast of England	43%	31%	33%	36%	25%	44%	52%	56%	76%	61%
West Country	52%	19%	39%	32%	35%	50%	39%	45%	54%	78%
Yorkshire	24%	54%	50%	86%	39%	32%	35%	38%	32%	28%
Lake District	34%	56%	59%	36%	29%	33%	30%	36%	30%	23%
Scotland	20%	49%	31%	32%	22%	28%	23%	32%	31%	24%
Peak District	22%	32%	40%	42%	33%	24%	29%	35%	24%	14%
Ireland	17%	17%	21%	16%	12%	17%	9%	35%	16%	12%

Relationship with each destination (%)

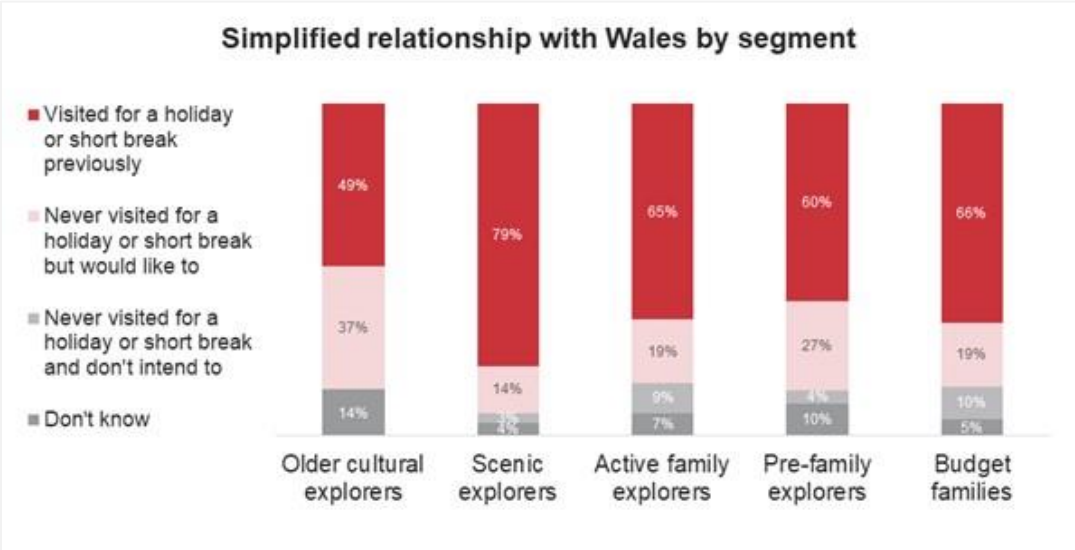
4.3 Familiarity does not directly correlate with previous visits for a holiday or short-break. Only the West Country (66%) has attracted a higher proportion of people who have previously visited for holidays or short breaks than Wales (63%). Positively, 1 in 5 (20%) of the UK domestic holiday market have never been to Wales for a holiday or short break but would like to in the future.

Figure 22



4.4 Scenic Explorers, Active Family Explorers and Budget Families are more likely to have previously visited Wales for a holiday or short break. There are substantial proportions of Older Cultural Explorers (37%) and Pre-family Explorers (27%) who have not visited Wales previously but would like to, an opportunity to grow new visitors to Wales.

Figure 23



Previous visits to each destination (%)

4.5 Wales is the *most* visited destination for three of the UK's regions (Wales, North West of England and the West Midlands). It is one of the *three* most visited destinations for seven of the UK's regions (in addition to those mentioned above East Midlands, London, South East of England and South West of England). Although Wales is in the top three most visited regions for people living in London and the South East, both generate more visits to the West Country and South Coast of England.

4.6 Previous visits tends to correlate with geographical proximity, although this isn't always the case. Scottish residents, for example, are more likely to have visited Wales than residents of the East Midlands or East of England.

Figure 24: Proportion that have previously visited each part of the UK for a short break or holiday by region of residence.

(Region of residence is on horizontal row, place visited along the vertical column – e.g. 55% of Wales residents have visited Scotland for a short break/ holiday

Destination	Region of Residence									
	Wales	North East	North West	York	East Mids	West Mids	East Eng.	Lond.	South East	South West
Wales	85%	39%	80%	54%	56%	77%	49%	57%	60%	76%
Scotland	55%	73%	61%	64%	54%	50%	50%	55%	55%	57%
Ireland	41%	44%	42%	38%	32%	35%	38%	54%	42%	41%
Yorkshire	46%	66%	58%	75%	64%	50%	60%	55%	44%	47%
Lake District	52%	66%	73%	58%	44%	48%	45%	56%	52%	44%
West Country	72%	39%	59%	57%	78%	67%	65%	62%	79%	84%
Peak District	33%	36%	41%	60%	37%	45%	44%	45%	40%	35%
South Coast of England	59%	32%	51%	58%	53%	59%	74%	63%	78%	71%

Consideration of regions for a holiday or short break

4.7 Around 1 in 4 (26%) of the UK holiday market are seriously considering visiting Wales for a holiday or short break in the next 12 months. Consideration for Wales is largely similar as that for most UK destinations, although the West Country and Scotland is higher, the Peak District and Ireland lower.

4.8 Amongst segments, Wales is in the top three most considered destinations for ‘active family explorers’ and ‘budget families’. There is a much lower level of consideration of visiting Wales amongst Older Cultural Explorers, although this is in part related to low base sizes and a concentration of this segment in the Yorkshire region.

Figure 25: Proportion seriously considering visiting each part of the UK for a holiday or short break in the next 12 months

(QC5a) (%) (Base: All =1,150)

Figure 26: Proportion seriously considering visiting each destination for a short break or holiday in the next 12 months by segment

	Older cultural explorers	Scenic explorer couples	Active family explorers	Pre-family explorers	Budget families
West Country	23%	**49%**	**52%**	**51%**	**31%**
Scotland	**31%**	27%	30%	**37%**	**31%**
South Coast of England	15%	21%	30%	**37%**	**32%**
Lake District	**42%**	**29%**	**39%**	32%	29%
Wales	8%	27%	**35%**	36%	**31%**
Yorkshire	**42%**	**28%**	27%	21%	17%
Ireland	10%	20%	19%	34%	19%
Peak District	9%	17%	23%	22%	15%

4.9 Despite having generated the highest number of visits from three of the UK's regions, Wales is the most considered destination for a visit in the next 12 months for two of the UK's regions (Wales and the West Midlands), and in the top three most considered destinations for five of the UK's regions (North West England, West Midlands, East of England and the South West). The disparity between previous visits and consideration may be driven by frequency of visits, which in turn may be linked to geographical proximity. For example, a resident from Scotland may visit Wales but less regularly than they visit closer destinations.

4.10 However, proximity is not the only driver of visit intentions. For example, 31% of London residents are seriously considering visiting Ireland in the next 12 months, 10 percentage points higher than the proportion considering Wales. Despite relatively high previous visits to Wales, only the Peak District is considered by fewer residents of London. This suggests that The London market may offer a growth opportunity for Wales, particularly given the significantly higher consideration the London market has for destinations further away than Wales.

Figure 27: Proportion seriously considering visiting each destination by region of residence.

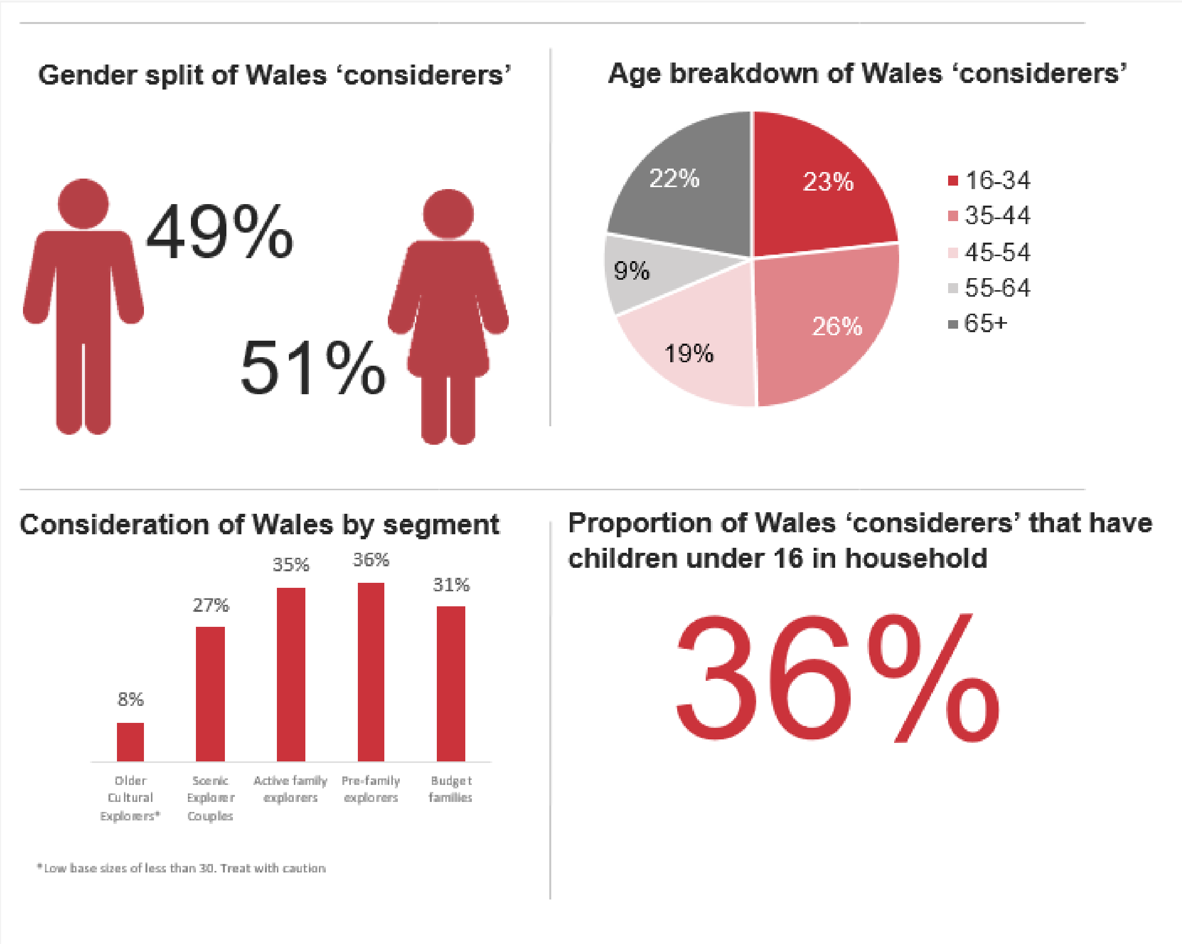
Region of residence is within columns, destination on rows.

Place Visited	Region of Residence									
	Wales	North East	North West	Yorks	East Mids	West Mids	East Eng.	Lond.	South East	South West
Wales	53%	12%	41%	13%	22%	41%	25%	21%	20%	25%
Scotland	23%	46%	28%	21%	19%	27%	15%	25%	25%	23%
Ireland	20%	27%	19%	15%	18%	17%	15%	31%	14%	13%
Yorkshire	16%	34%	28%	58%	37%	17%	17%	22%	16%	13%
Lake District	19%	36%	49%	36%	25%	23%	24%	28%	24%	13%
West Country	39%	22%	33%	18%	34%	38%	33%	34%	39%	60%
Peak District	8%	12%	19%	13%	23%	18%	17%	19%	17%	7%
South Coast of England	25%	17%	17%	16%	11%	22%	41%	36%	44%	36%

Profile of those considering Wales for a short break or holiday

4.11 There is an equal gender split for those considering a visit to Wales. Around half (49%) are aged under 44, and a similar proportion are in full time employment. Over a third (36%) have children in their household. Over 1 in 5 are aged 65+ (22%). There is a notably small proportion of Older Cultural Explorers considering visiting Wales compared to around 3 in 10 considering visiting Wales from the other segments.

Figure 28: Profiling information of ‘Wales considerers’ (Base: n=338)



4.12 There are some notable differences in profiles of considerers for each destination measured in the research. Wales is the only destination with a relatively even gender split, all other destinations attracting majority male audiences.

4.13 The age profile of Wales considerers is relatively consistent with the UK average. However, there are differences by destination. Yorkshire, The West Country and the South Coast of England attract a higher proportion of those aged 55+. Ireland attracts a significantly higher proportion of those aged 16-34.

Figure 29: Profiling information of 'considerers' of each destination by key demographics

		Consider visiting these destinations							
		Wales	**Scotland**	**Ireland**	**Yorkshire**	**Lake District**	**West Country**	**Peak District**	**South Coast**
Gender	Male	49%	58%	56%	57%	54%	55%	59%	56%
	Female	51%	42%	44%	43%	46%	45%	41%	44%
Age	16-34	23%	25%	34%	21%	26%	22%	28%	21%
	35-44	26%	24%	26%	23%	29%	23%	28%	25%
	45-54	19%	21%	18%	20%	18%	18%	15%	18%
	55-64	9%	9%	9%	9%	9%	9%	7%	9%
	65+	22%	22%	13%	27%	17%	27%	22%	27%
Children in house	Yes	36%	35%	33%	34%	42%	38%	41%	35%
	No	64%	65%	67%	66%	58%	62%	59%	65%
REGIONS	Wales	10%	4%	5%	3%	4%	6%	3%	5%
	Scotland	5%	22%	8%	9%	5%	3%	4%	3%
	North East England	2%	6%	6%	6%	6%	3%	3%	3%
	North West England	18%	11%	10%	13%	20%	11%	14%	7%
	Yorkshire/ Humber	4%	6%	7%	20%	11%	5%	7%	5%
	East Midlands	6%	5%	7%	11%	7%	8%	11%	3%
	West Midlands	14%	8%	8%	6%	8%	10%	11%	7%
	East of England	9%	5%	7%	6%	8%	9%	11%	14%
	London	11%	11%	20%	11%	14%	13%	17%	18%
	South East England	11%	12%	9%	9%	12%	16%	15%	23%
	South West England	8%	6%	6%	5%	4%	15%	4%	11%

Reasons for not considering Wales

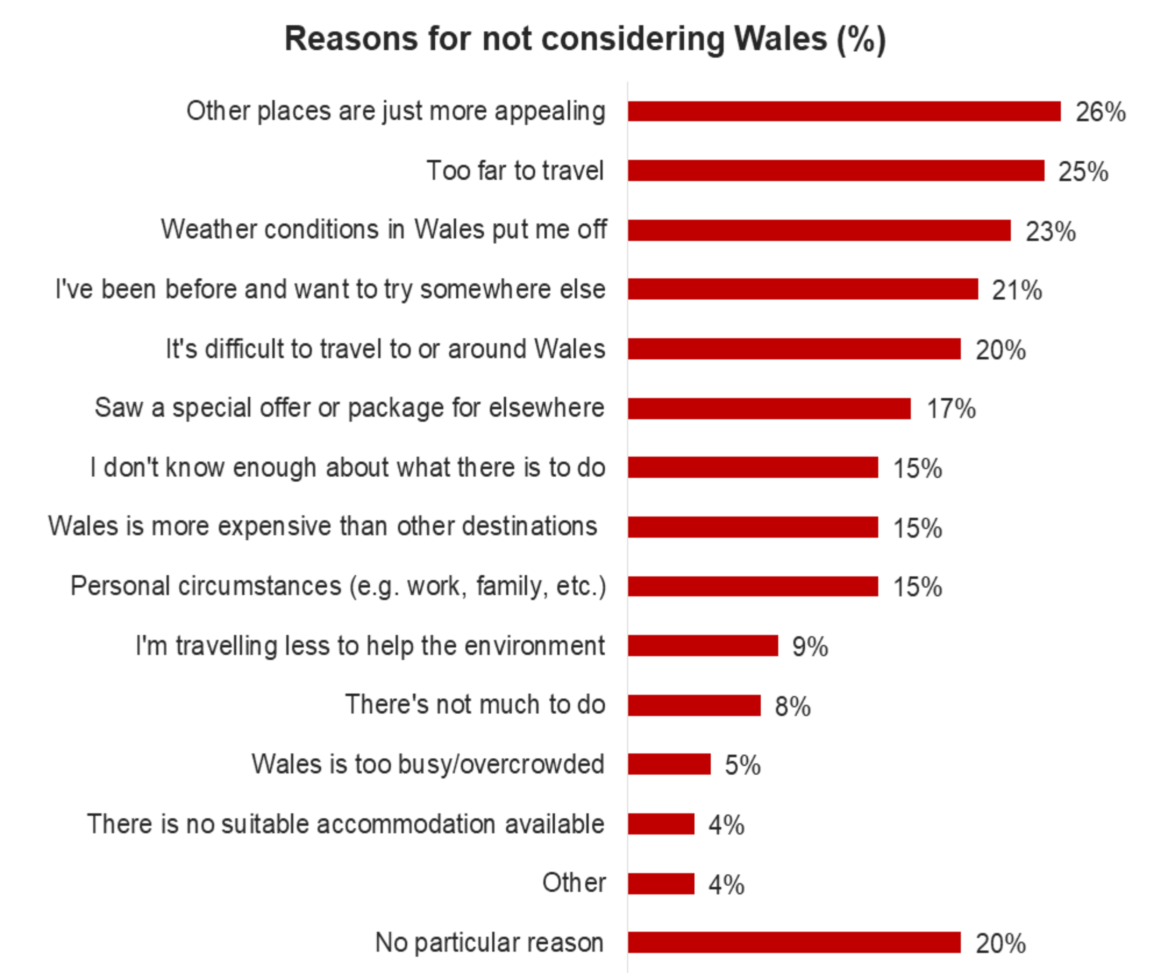
4.14 There were no overwhelming reasons for *not considering* Wales for a holiday or short break, the most commonly stated being the appeal of other places (stated by 26%), 'too far to travel' (25%) and the weather conditions (23%). Perceptions of difficult travel to and around Wales also act as a barrier (20%).

4.15 A claimed lack of knowledge of what there is to see and do in Wales was a barrier for 1 in 7 (15%), highlighting the benefit in Visit Wales promotional activity around the various activities available on a trip to Wales. 1 in 7 (15%) also perceive Wales as more expensive than other destinations, making this a barrier for visiting for some.

4.16 Amongst priority segments there was some variation. 'Older cultural explorers' were the most likely to be put off by weather (42% stating this compared to 23% on average) and to state that 'other places are just more appealing' (41% vs. 26%). 'Scenic explorers' were most likely to state they'd been before and wanted to try somewhere else (30% vs. 21%). The appeal of other places was also a key factor for 'pre-family explorers' (25% vs. 26%)

and 'activity family explorers' (37% vs. 26%), the latter also likely to regard Wales as more expensive than other destinations (23% vs. 15%)

Figure 30



(QG15) (Base: All not seriously considering visiting Wales n=857)

4.17 'Other places are more appealing' is also the leading reason for not visiting Wales amongst residents from the majority of UK regions, although this is not the reason for the *majority* of non-visitors in *any* region.

4.18 'Wales is too far' is the main reason for those living further away from Wales, whilst 'been before' is a barrier for those living closer, including residents living in Wales itself. This suggests a need for Visit Wales to convey ease of access and the variety of different types of trip available.

4.19 'Don't know enough' about Wales is a key reason for residents within London, highlighting the potential impact of marketing amongst this audience.

4.20 Perceived bad weather is also a leading reason for those living outside of Wales – less so for those living within Wales.

Figure 31: Reasons for not visiting Wales from residents of each region.

(Base: All not seriously considering visiting Wales. Red represents top three barriers within each region)

Reason given	Wales	North East	North West	York	East Mids	West Mids	East Eng.	Lond.	South East	South West
Other places more appealing	14%	36%	29%	18%	28%	27%	29%	27%	24%	27%
Too far	7%	39%	11%	23%	24%	15%	38%	22%	27%	27%
Weather	9%	17%	29%	25%	25%	31%	25%	20%	29%	16%
Been before	21%	19%	21%	15%	17%	34%	19%	28%	17%	37%
Travel to is difficult	14%	17%	19%	21%	16%	35%	21%	23%	20%	14%
Special offer elsewhere	16%	11%	18%	22%	14%	26%	13%	22%	14%	8%
Personal circumstance	14%	11%	16%	10%	16%	23%	17%	18%	13%	9%
Expensive	8%	14%	13%	12%	16%	19%	10%	21%	14%	11%
Don't know enough	8%	5%	9%	12%	16%	11%	13%	25%	12%	16%
Environmental concerns	3%	3%	12%	14%	9%	13%	9%	14%	5%	9%
Not much to do	8%	3%	11%	3%	9%	10%	6%	7%	8%	9%
Too busy/ overcrowded	2%	3%	3%	7%	5%	6%	4%	9%	4%	3%
No suitable accomm.	2%	-	3%	7%	5%	11%	8%	5%	3%	1%
Other	31%	-	2%	6%	6%	-	5%	2%	5%	3%
No reason	25%	25%	22%	25%	25%	17%	13%	17%	22%	21%
Ave. number of reasons	1.6	1.8	2.0	2.0	2.1	2.6	2.2	2.4	2.0	1.9

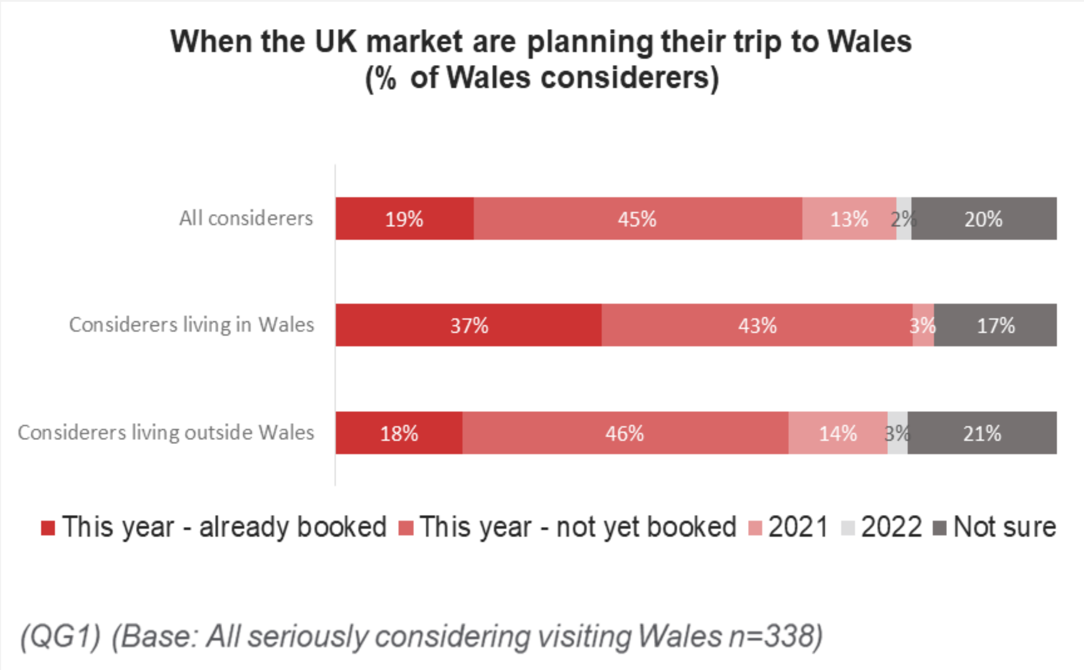
5. Visiting Wales*[1]

Timing of anticipated trip to Wales

5.1 Of those within the UK market seriously considering visiting Wales in the next 12 months, 1 in 5 (19%) had already booked a trip for 2020 at the time of the research at the end of February 2020. Nearly half (45%) were planning a trip in 2020 but had not yet booked it. The remainder were either planning a trip in 2021 and beyond (15%), or weren't sure (20%). 1 in 4 (23%) had booked accommodation. This highlights the need for Visit Wales to ensure Wales remains front of mind to convert those yet to have definitely decided to visit.

5.2 Bookings varied significantly depending on whether potential visitors lived outside Wales or not. Nearly 2 in 5 (37%) of 'considerers' who live in Wales had already booked their trip this year, compared to nearly 1 in 5 (17%) living outside of Wales.

Figure 32



[1] *Regional and priority segment sub-groups within this section are based on base sizes below 25, so results are indicative only. There are a few exceptions – in particular Wales (n=108), North West of England (n=45), West Midlands (n=36), South East England (n=28) and London (n=27).*

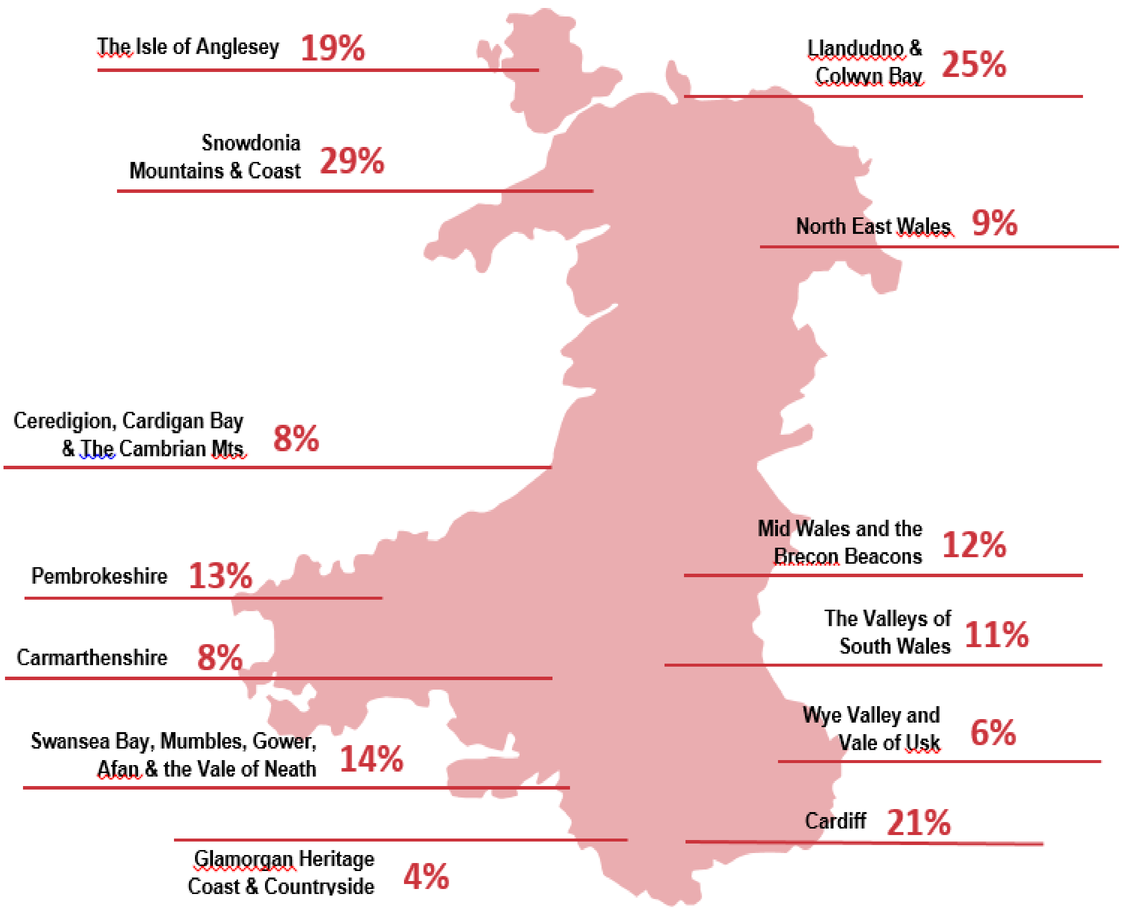
Where intending to visit in Wales

5.3 UK residents considering a trip to Wales are considering visiting 2 areas of Wales on average. North Wales destinations tend to be the most popular (considered by 54% of potential visitors in total) Snowdonia attracting 29% and Llandudno and Colwyn 25%. South Wales (all areas excluding North Wales, Mid Wales and Ceredigion) is appealing for 52% of those considering Wales in total). Cardiff is the most popular destination in South Wales (21% considering to visit), followed by Swansea Bay (14%) and Pembrokeshire (13%).

5.4 Although place of residence dictates preferred region to some extent – for example, residents from the North West England are significantly more likely to consider a visit to Llandudno and Colwyn Bay and other areas of North Wales – this is not always the case. Residents of London and SE England are more drawn to Snowdon than most areas within South Wales, with the exception of Cardiff.

5.5 Wales residents index high for Pembrokeshire and Cardigan Bay, significantly more so than other regions within the UK.

Figure 33: Areas of Wales considered for a visit in 2020 (%)



(QG8) (Base: All considerers n=338)

Figure 34: Areas of Wales considering visiting by region

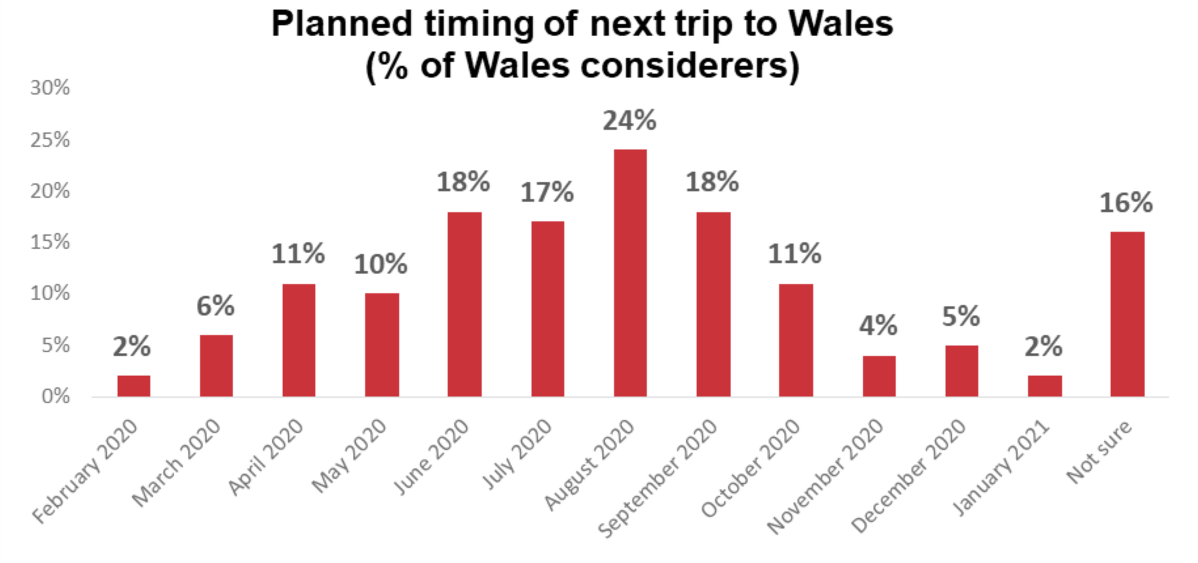
(Base: All seriously considering visiting Wales – regions with base size below 25 excluded. Top 3 per region highlighted in red)

	Region of Residence				
Destination in Wales	**Wales**	**North West England**	**West Mids**	**London**	**South East England**
Snowdon	**24%**	**27%**	**20%**	**29%**	**47%**
Llandudno and Colwyn Bay	19%	**52%**	**25%**	14%	11%
Cardiff	11%	13%	17%	**34%**	**21%**
The Isle of Anglesey	19%	**27%**	6%	**26%**	14%
Swansea Bay	7%	6%	**19%**	15%	14%
Pembrokeshire	**32%**	13%	16%	11%	**18%**
Mid Wales & Brecon Beacons	6%	5%	11%	18%	15%
South Wales Valleys	7%	4%	16%	11%	14%
North East Wales	6%	6%	6%	7%	3%
Cardigan Bay/ Ceredigion	**17%**	4%	6%	15%	4%
Carmarthenshire	10%	6%	6%	7%	15%
Wye Valley and Vale of Usk	4%	4%	3%	7%	0%
Glamorgan Heritage Coast	5%	0%	0%	7%	4%

Anticipated month for next trip to Wales

5.6 Perhaps unsurprisingly, the summer months are the most popular for a trip to Wales (August generating the most intended visits at 24%), although at least 10% state they will visit in each of the months between April and October. Amongst priority segments where base sizes allow analysis, 'active family explorers' index higher in months when there are school holidays (April, July, August and September), 'Scenic Explorer Couples' in June (30% compared to 18% on average), 'pre-family explorers' in August (42% compared to 24% on average).

Image 35



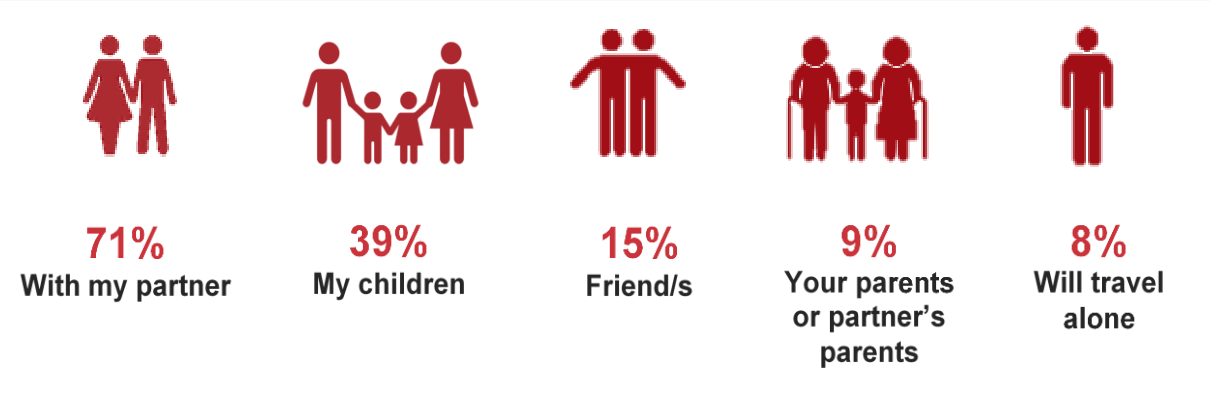
(QC8) (Base: All seriously considering visiting Wales n=338)

Anticipated party composition for next trip to Wales

5.7 Wales considerers from the UK are most likely to travel to Wales with their partner (71% intending to do so), followed by 'their children' (39%) and 'friend/s' (15%). In total 87% of UK visitors to Wales would travel to Wales with either a partner or family.

5.8 Notably 6% would anticipate travelling to Wales on a multi-generational trip (3 generations or more). Following COVID-19 there is an expectation that this type of trip will grow in prominence, as families seek to reconnect following weeks or even months of social isolation.

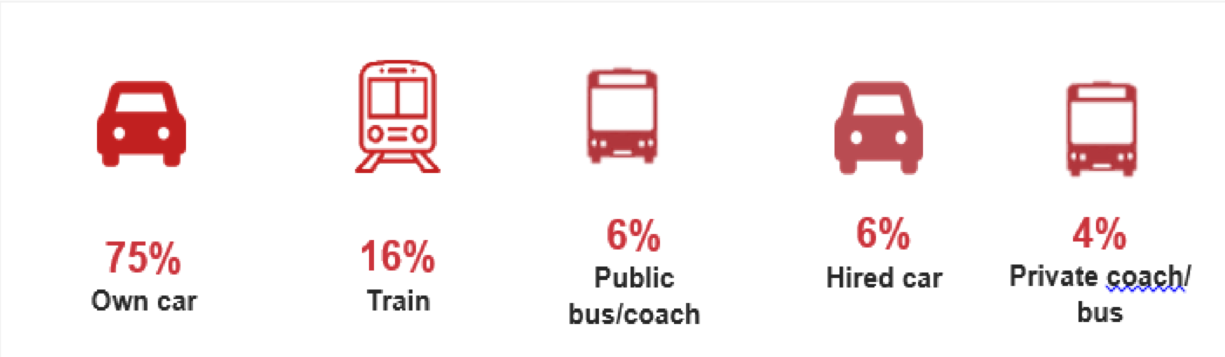
Figure 36: Anticipated party composition (Top 5)
(QG6) (Base: n=338)



Anticipated mode of travel to Wales

5.9 The UK market are most likely to travel to Wales using their own car (75% stating this), followed in a distant second by ‘train’ (16%). 19% would use some sort of public transport (either train and/or public bus/coach)

Figure 37: Anticipated mode of travel to Wales (QG14) (Base: n=338)



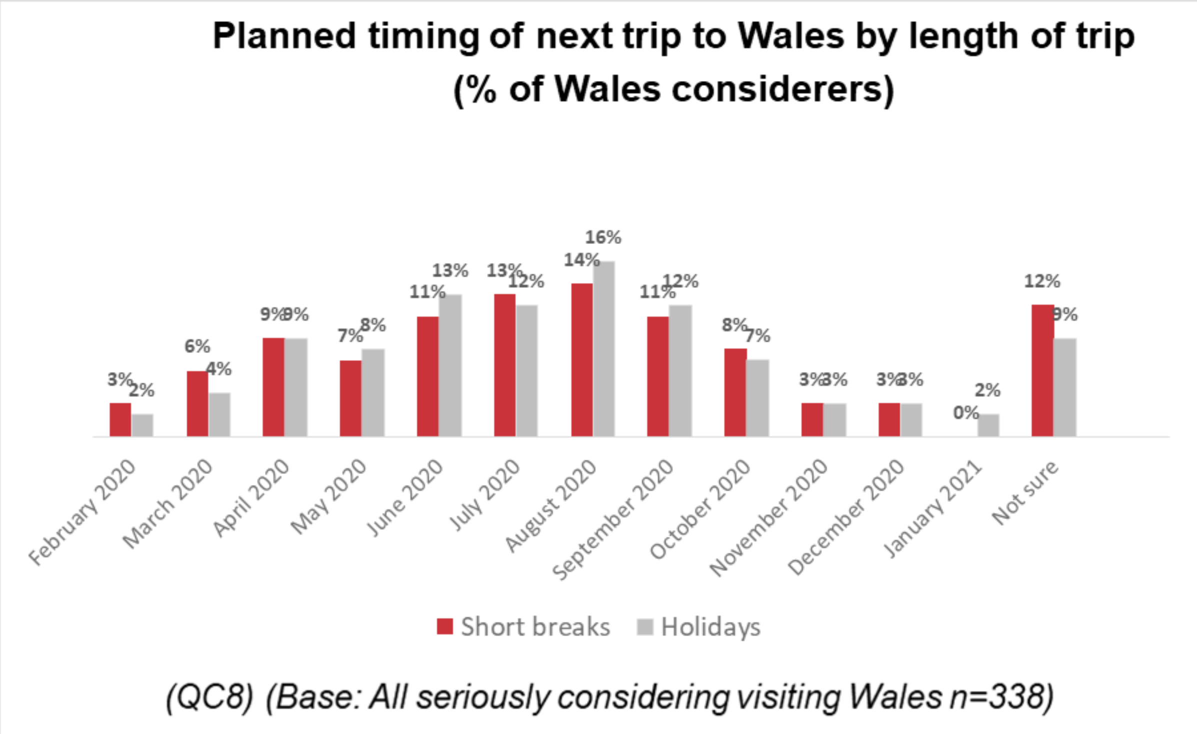
Length of anticipated trip to Wales

5.10 Of those within the UK market considering a trip to Wales, the majority (60%) plan on taking a trip of 4+ nights, whilst around 2 in 5 (39%) plan on taking a short break. This is a higher proportion of people intending to take a longer holiday in Wales than the pattern of holiday taking in recent years which shows a higher proportion of short breaks. On average Wales considerers anticipate taking an average length trip of 5 nights in Wales.

5.11 Anticipated months for taking trips are relatively consistent by short break and holidays, although holidays are marginally more likely to be taken in August.

Figure 38: Planned length of trip to Wales amongst ‘Wales considerers’ (QG2) (Base: n=338)

Figure 39



Anticipated information sources to plan next trip to Wales

5.12 UK residents planning on visiting Wales for a holiday or short break are most likely to generate information about their trip through websites and apps (63%). Word of mouth is also important, half (50%) influenced by personal recommendation. 3 in 10 (31%) are influenced by email or social media, 1 in 4 (25%) by printed information.

Figure 40: Net information sources (%) (Base: n=338)

5.13 Conversations with friends and family who have visited is the single biggest source of information for a trip to Wales, 37% stating this, followed by search engine (28%) and traveller review sites (25%). Online travel agents are also regarded as an important influence. Of the social media influences, a friend's social media is the most important (16% citing this). However, around 1 in 9

(11%) are persuaded by a tourist board's social media pages, underlining the importance of Visit Wales' social content.

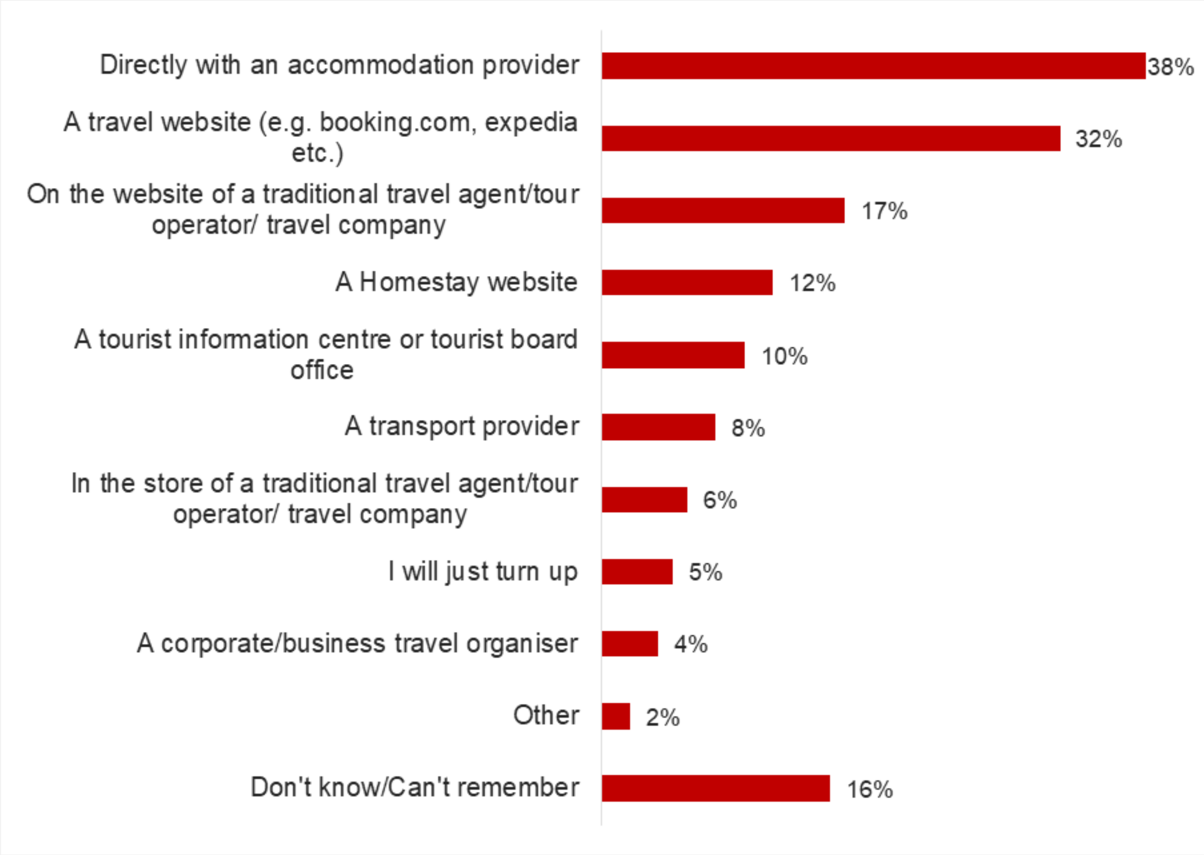
Figure 41: Anticipated information sources for trip to Wales (%)

Anticipated booking channels for next trip to Wales

5.14 2 in 5 (38%) of those planning a visit to Wales would anticipate booking their accommodation directly via an accommodation provider, followed by around a third (32%) planning to do so via a travel website (such as booking.com or Expedia).

5.15 There are notable differences by age groups however. Amongst 25-44 year olds, travel websites are the number one booking channel, whilst for those aged 45 and over, 'accommodation providers' are used significantly more than average.

Figure 42: Anticipated accommodation booking channels for trip to Wales (% listed)



(QG5) (Base: n=338)

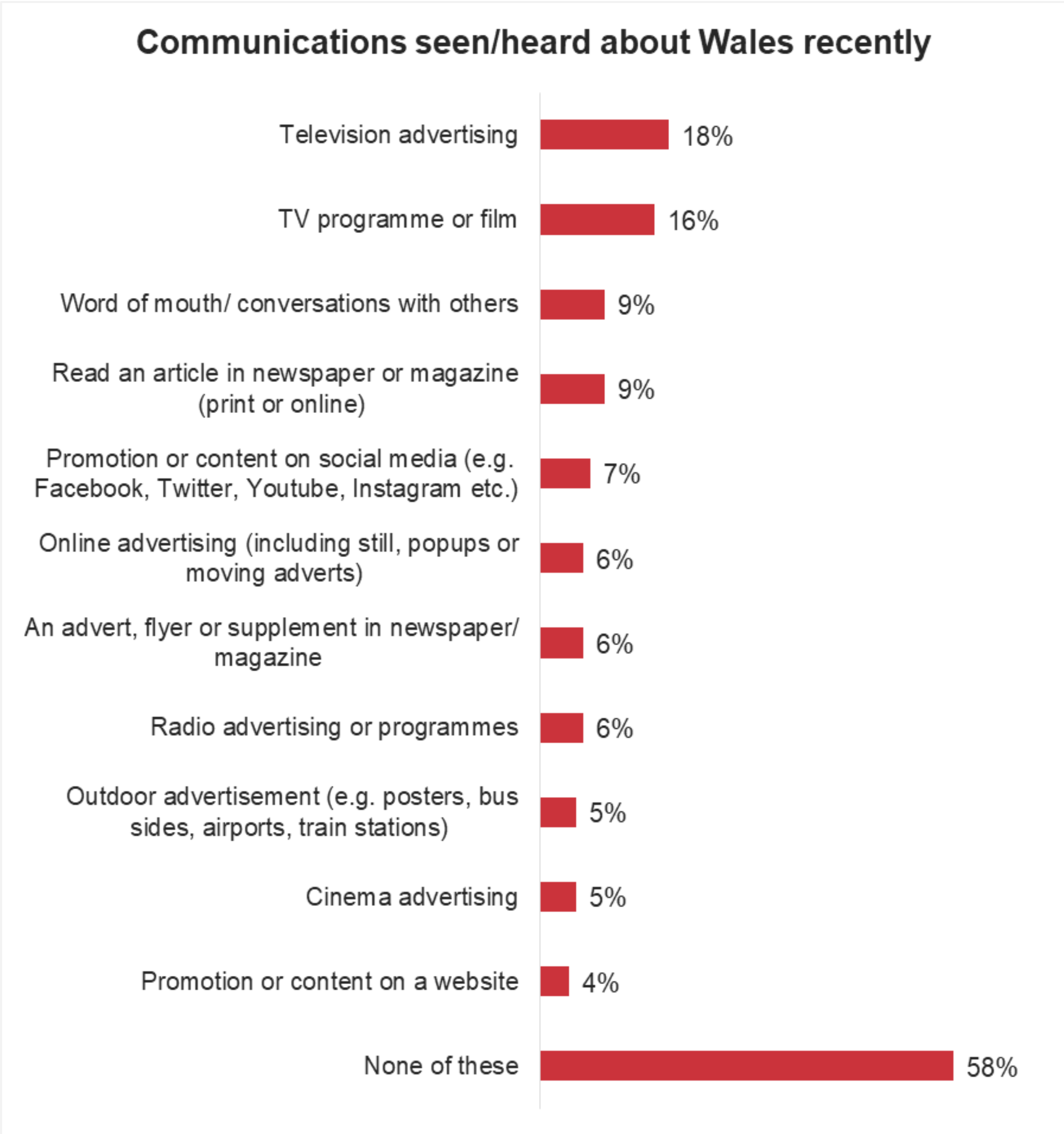
6. Contact with Visit Wales

Recent communication seen/heard about Wales recently

6.1 Unprompted, around 1 in 5 (18%) of the UK market recall seeing television advertising about Wales recently and 1 in 6 recall a TV programme or film about Wales. There is recall of a range of other communications about Wales, 42% having seen or heard communications about Wales in at least one place.

6.2 Recall of communications about Wales is highest amongst residents of Wales, the West Midlands and London, the latter perhaps linked to targeted marketing. It is also high amongst 'active family explorers'.

Figure 43



(QH1) (Base: All n=1,150)

Figure 44: Communications seen/heard by region

	Region of Residence										
	Wales	Scot.	North East	North West	York s.	East Mids	West Mids	East Eng.	Lond	South East	South West
Television advertising	26%	10%	7%	20%	24%	22%	23%	10%	20%	22%	16%
Word of mouth	21%	4%	12%	8%	13%	13%	9%	10%	6%	8%	10%
TV programme of film	18%	10%	10%	13%	16%	16%	25%	13%	22%	14%	14%
An article	11%	9%	2%	10%	8%	4%	10%	5%	14%	10%	7%
Radio advertising/ programmes	7%	4%	2%	8%	9%	4%	9%	4%	9%	1%	4%
Advert/flyer in newspaper	7%	7%	5%	5%	4%	7%	11%	4%	9%	5%	5%
Promotion or content on social media	6%	3%	5%	7%	11%	7%	7%	2%	14%	4%	5%
Online advertising	5%	5%	2%	4%	6%	7%	6%	7%	10%	3%	5%
Outdoor advertisement	4%	1%	5%	2%	1%	8%	7%	7%	9%	2%	4%
Cinema advertisement	3%	2%	5%	7%	5%	1%	8%	4%	9%	4%	2%
Promotion or content on website	3%	2%	5%	3%	2%	1%	7%	7%	5%	4%	2%
None of these	42%	67%	71%	58%	56%	61%	46%	65%	48%	60%	64%

Recall of Visit Wales television advertising (prompted)

6.3 Nearly 1 in 4 of the UK market recall seeing the recent Visit Wales television advertising. Amongst Visit Wales' priority segments, 'active family explorers' were the most likely to have recalled it, although they tend to have higher engagement with marketing generally.

6.4 It's worth noting that the research was conducted at the start of the Visit Wales television advertising cycle.

Figure 46: Recall of Visit Wales TV advert overall and by segment

22%

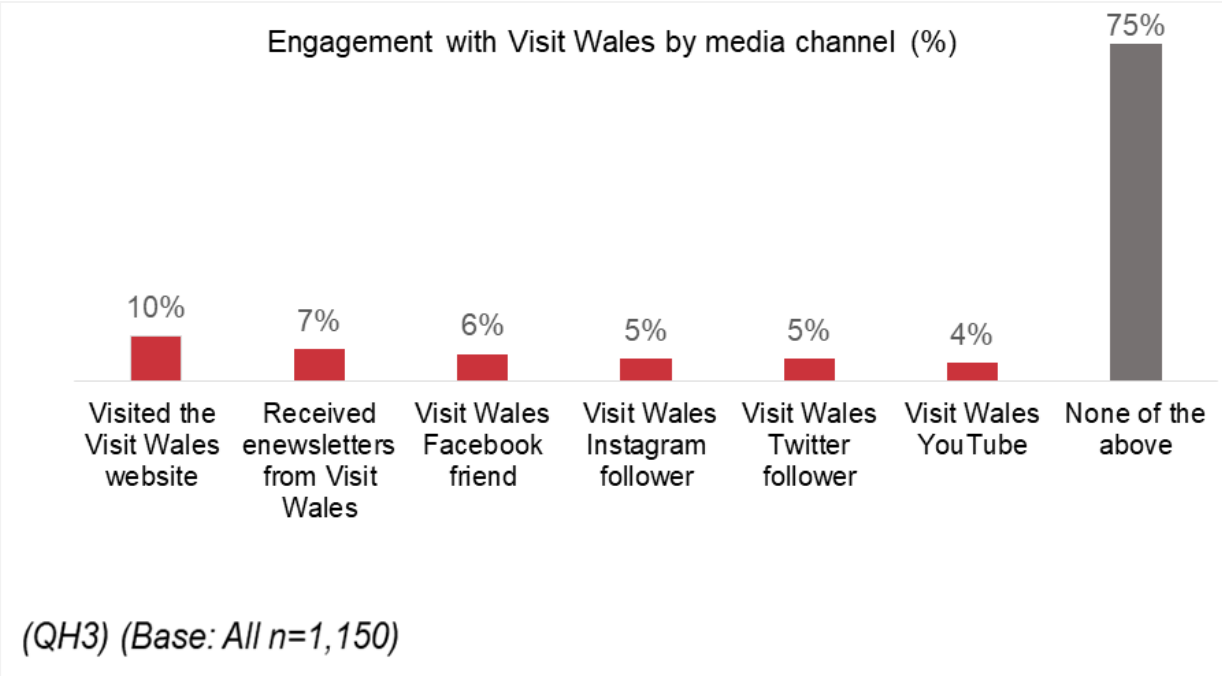
Recall seeing the Visit Wales television advertising.

Older Cultural Explorers	Scenic Explorers	Active Family Explorers	Pre-family explorers	Budget Families
10%	**20%**	**25%**	**19%**	**21%**

Engagement with Visit Wales communications previous 12 months

6.5 1 in 4 (25%) of the UK market have engaged with Visit Wales communication sources in some way in the last 12 months, 15% with Visit Wales social media. 1 in 10 (10%) stated that they had visited the Visit Wales website in the previous 12 months. E-newsletters were recalled by 7% with similar proportions engaging with Facebook, Instagram, Twitter and YouTube.

Figure 47: Engagement with Visit Wales in the last 12 months



7. Key Findings & Implications

7.1 **Personal finances are a key influence on Britons' holiday-taking behaviour**, particularly when it comes to trips in the UK. Of the 2 in 5 anticipating taking more trips in the UK in the next 12 months, finances were a reason for doing so for half. Great value for money was an influential factor for 3 in 5 of all Britons planning on a taking a trip in the UK this year. The importance of financial considerations – which will likely be greater as the year progresses, highlight the need for Visit Wales to promote the good value of trips within Wales, particularly to 'active family explorers' and 'pre-family explorers' for whom 'value for money' is an influential driver of choice.

7.2 Despite the importance of financial considerations for a large proportion of the domestic market, **not all visitors adopt this mind-set**. A wide range of other factors influence behaviour, some of which suggest a more affluent potential visitor. For example, a third are influenced by high quality accommodation, and 1 in 4 by places renowned for their food and drink. For 'older cultural explorers', 'value for money' is the 7th most important influence. With this in mind, it is important that Wales is presented as a 'quality destination' as well as good value.

7.3 **The vast majority of the domestic holiday market are interested in taking a UK trip in either coastal or rural destinations**. Behind value for money, 'scenery and landscapes' is the most influential choice driver (the most important for 'scenic explorers'), and over half would anticipate engaging in outdoor exercise on a trip. It's also worth noting that environmental concerns are a driver for around 1 in 5 of those planning on taking more trips in the UK this year. Together, all of these factors suggest Visit Wales' Year of Outdoors campaign could resonate strongly with the domestic market.

7.4 However, **the vast majority of the domestic market are also interested in trips to urban areas,** be they large towns and cities, or historic and heritage towns, particularly outside of the summer season. It is therefore important that Visit Wales does not neglect Wales' built urban heritage whilst promoting the Year of Outdoors.

7.5 Similarly, **there is clearly an important role for holiday villages and centres** for 'active family explorers' as it was the most considered type of destination for a UK holiday by them.

7.6 **The majority of the domestic market have previously visited Wales for a holiday or short break but only a minority feel they know Wales very or fairly well**. It is therefore essential to promote what you can do in Wales, and what it has to offer, beyond inspiring communications that may initially capture the imagination. This is especially important for the 1 in 5 of the UK sample that have not visited Wales yet, but would like to, and those who have visited only once. There may also be a need to promote areas of Wales beyond the honey-pot destinations of Snowdon, Llandudno and Cardiff, perhaps drawing attention to areas preferred by Welsh residents in West Wales. This is particularly important for the 1 in 5 of non-visitors to Wales who are not visiting because they have been before.

7.7 **Perhaps driven by low familiarity, a significant barrier to visiting Wales is the perceived difficulty of travel to and within the country**. The Year of Outdoors marketing, and its suggestions of adventure and wilderness, may inadvertently exacerbate this barrier, so Visit Wales should do all that's possible to highlight the ease of access to and within the country.

7.8 **The opportunity of increasing familiarity is perhaps greatest for residents of London and the South East**. Presently, Wales is not in the top three most considered destinations for a holiday or short-break for residents of London and the South East. Although this will in part be driven by proximity (South Coast of England is in the top 3), this is not the only factor - both the West County and Ireland also make up the top three. Notably, London residents are more likely than any other region to state they are not considering Wales in 2020 because they 'don't know enough about it'. 'Scenic coastlines and harbours' are a leading priority for both the London and South East market - an area where the West Country currently has significantly higher associations. Increasing familiarity of Wales and its scenic coastlines through the Year of Outdoors may drive residents from London and the South East to choose Wales over the West Country, particularly in a period of social distancing given the West Country's associations with over-tourism. Promotion of the coastlines' proximity to mountains and historic heritage may also provide Wales with a strong selling point over the West Country.

7.9 **Promoting Wales' scenic coastlines** may also act as a draw for Visit Wales' priority segments, each of whom currently list 'scenic coastlines and harbours' as a 'top 2' type of domestic holiday destination, and score the West Country significantly higher in this area. 'Active family explorers' may be a particularly good target for this, given their intention to take more UK holidays this year.

7.10 **Visit Wales should also consider its core markets**, in particular nearby regions such as North West of England, West Midlands and the residents of Wales amongst whom the incidence and number of potential visitors is highest. Following the lifting of the UK lockdown, domestic travellers may not wish to travel long distances on their breaks so these regions are likely to assume particular importance.

7.11 **Only 1 in 4 of those that intend to visit Wales for a trip have actually booked it, so Visit Wales marketing is very important to remain front of mind**. This is especially important for those living closer to Wales, who are more likely to visit than those living further away. Convenient, close travel may become more of a factor as the COVID-19 restrictions ease.

7.12 **A further anticipated trend following COVID-19 is that of multi-generational family trips.** Currently making up around 6% of Wales holiday-makers, this is likely to grow as families seek to reconnect following weeks or months of social distancing. Visit Wales may wish to promote the potential for these types of trips.

8. Appendix: Methodology

Methodology

8.1 Respondents were contacted though an online panel which could be completed via desktop or mobile device. A combination of panels were used, with Dynata being the lead panel provider

8.2 Fieldwork took place from **20th February to 2nd March 2020,** prior to the main COVID-19 outbreak and restrictions in the UK. The survey took 20 minutes to complete on average.

8.3 To ensure quality of responses, a number of steps were put in place during and following the survey:

(1) At the start of the survey, respondents were given a ‘trap question’, to screen out those providing affirmative responses for the sole purpose of qualifying for the survey. The question asked respondents to indicate the continents they had visited for a holiday in 2019. Respondents that ticked all boxes were screened out.

(2) Flat-liners – respondents that provided similar responses to all rating questions were removed from the survey

(3) Speeders – respondents that completed the survey in an unrealistically quick time were removed from the survey

(4) Data tables were checked against the raw data

(5) All stages were conducted in line with ISO20252

8.4 There were 1,150 completed surveys. The first 1,000 responses were nationally representative of the UK’s domestic holiday-taking population. This was established by replicating this study’s qualifying questions on a nationally representative omnibus survey conducted between February 5th and February 11th 2020. A boost of 150 surveys were then conducted amongst residents from Wales.

8.5 The final responses were weighted so that Wales residents were representative of the UK population.

Sample definition

8.6 To qualify for the survey, participants had to fulfil the following criteria:

- Must be a holiday or short break decision-maker
- Must be *seriously* considering taking a holiday or short break in the UK in the next 12 months.

Base sizes and statistical reliability

8.7 Different sub-groups are referred to throughout this report, and it is essential the reader is aware of their base sizes and the statistical reliability of the figures presented. In some cases, base sizes are low, so should be treated with caution. The table below demonstrates the margins of error at a 95% confidence level for some of the key sub-groups used within the report.

Figure 48

	Confidence Interval		
Size of sample or sub-group on which survey result is based	*10% or 90% ±*	*30% or 70%±*	*50%±*
ALL RESPONDENTS (1,150)	1.7	2.6	2.9
WALES CONSIDERERS (338)	3.2	4.9	5.3
Scotland (81)	6.2	9.4	10.3
North East England (41)	9.2	14.0	15.3
North West England (110)	5.6	8.6	9.3
Yorkshire/Humberside (84)	6.4	9.8	10.7
East Midlands (72)	6.9	10.6	11.5
West Midlands (88)	6.3	9.6	10.4
East of England (92)	6.1	9.4	10.2
London (128)	5.2	7.9	8.7
South East England (138)	5.0	7.6	8.3
South West England (84)	6.4	9.8	10.7
Wales (200)	4.2	6.4	6.9
Northern Ireland (29)	10.9	16.7	18.2
Older cultural explorers (26)	11.5	17.6	19.2
Scenic explorer couples (73)	6.9	10.5	11.5
Active family explorers (68)	7.1	10.9	11.9
Pre-family explorers (66)	7.2	11.1	12.1

Methodology limitations

8.8 As with all surveys of this type there are some limitations with the survey methodology. The key limitations are:

- **Self-selecting bias:** The respondents within this survey are ‘self-selecting’, meaning that they have put themselves forward to complete the research. This naturally creates a bias in the type of respondent that answers the survey. For example, they tend to be more proactive individuals than the population on average, and may therefore index higher in their likelihood to visit UK destinations. Furthermore, as people who regularly respond to surveys of all different types, they are likely to have more developed opinions on a range of matters than average.

- **Online sample:** Although the majority of Britons are now online, 'online literacy' remains lower for the older populations, so it is likely that this age group will be disproportionately impacted by the self-selecting bias.
  Sample Representativeness: The sample for this survey is chosen based on their responses that they are a holiday or short break decision-maker and are *seriously* considering taking a holiday or short break in the UK in the next 12 months. This may mean they are not fully representative of the wider UK population and inferences are limited on this basis.
- **Hypothetical responses:** Some responses will be based on hypothetical projections, and should be reviewed in this light. Examples of this include questions around predicted booking and travel behaviour when visiting Wales.
- **Conflicting influences:** For some sub-groups, responses will be influenced by factors beyond the sub-group's self-contained definition. For example, for questions about previous visits to Wales, 'region of residence' is a leading influence (distance being a key barrier to visiting). If a priority segment disproportionately lives a long way from Wales, their likelihood to visit will be lower because of where they live, as opposed to because of their segment preferences.

8.9 It is important to note that these limitations will be consistent across survey waves, so any movements in responses will be driven by legitimate factors, outside of the methodology.