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Visit Wales Recontact Survey 2021

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Full Research Report: Visit Wales Conversion Report.
Cardiff: Welsh Government, GSR report number 18/2022.

Available at: <https://gov.wales/visit-wales-consumer-re-contact-survey-2021>

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

For further information please contact:

Research and Insights Team
Visit Wales,
Economy, Skills and Natural Resources Group
Cathays Park
Cardiff
CF10 3NQ
Email: tourismresearch@gov.wales

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 tourism destination.

This is a detailed report drawn from an online survey conducted in January 2022 amongst Visit Wales consumer contacts (referred to as 'enquirers' throughout the report). Consumer contacts are defined as people who engaged with Visit Wales or partner communications, and provided their contact details to Visit Wales from 2019 to 2021. The specific research objectives were to evaluate:

Trips taken in 2021

- The proportion of enquirers who visited Wales in 2021 for a short break or holiday
- The characteristics of trips taken in Wales and the profile of visitors taking holidays
- The overall experience in Wales and ratings for elements of trips

Trips intentions for 2022

- The proportion of enquirers planning on a Wales trip in 2022
- Anticipated trip characteristics for Wales trips in 2022

Marketing effectiveness

- Marketing recall of Visit Wales' 'off-peak' campaign and Addo promise
- Perceived impact of Visit Wales marketing

General behaviour and sentiment

- Attitudes to sustainability
- Impact of COVID-19 on trip behaviour

Methodology, sample and response rate

Methodology

Enquirers were contacted by Visit Wales via email in January 2022 and asked to complete a 10-15 minute online survey available in English and Welsh. Reminder invites were sent out to non-openers, and a prize draw incentive was also offered. Participants were given 18 days within which to complete the survey – the survey opening on 19th January and closing on 7th February.

Sample and response rate

Sample was derived from a number of different sources (as indicated in the table below), reflective of how they had been in contact with Visit Wales. The vast majority (75%) of enquirers signed up to the Visit Wales database in 2019.

The table below outlines the sample sources and number of available contacts by sample source and at a total level.

Sample source	Sample sizes
Website intercept surveys	2,621
Social media surveys	188
Campaign specific activity	25,989
Other (inc. prior website campaigns, and Visit Wales newsletter subscribers)	11,755
TOTAL SAMPLE	40,553

From 40,553 invites sent to enquirers, 4,522 completed survey responses were received, **delivering an overall response rate of 10%.**

Sample considerations/1

It is important to note that the sample used for this research is not representative of the UK population, or of visitors to Wales. The results only represent a proportion of visitors that have an existing relationship with Visit Wales. The below sample considerations should therefore be kept in mind when reading the report:

1. **Relationship with Wales:** In the main, enquirers will be naturally warmer towards Wales and its marketing, engagement with Visit Wales communications being a prerequisite to taking part in the survey.
2. **Decision-makers not full visitor parties:** Enquirers are more likely than average to be 'holiday or short break organisers', having given their details at the planning stage of a trip. This may generate profile biases, so it is important to note that profiling refers to enquirers not the full visitor parties.
3. **Geographical bias:** Despite making up a large proportion of overnight trip-takers in Wales, Wales residents only make up a minority (0.8%) of Visit Wales enquirers. Results are therefore biased to enquirers that live elsewhere in the UK.
4. **Age and segment bias:** The sample also has a strong bias towards older age groups and Visit Wales' priority segments. The wider market has a more even balance.

Sample considerations/2

The tables below and on the next page illustrate these sample considerations, using the following data sources.

1. **2022 research respondents:** Respondent proportions from this research study
2. **2020 research respondents:** Respondent proportions from the equivalent survey conducted in January 2020.
3. **UK Holiday Market breakdown:** The breakdown of the UK overnight trip market as of 2020 (pre-pandemic) based on a nationally representative survey amongst holiday decision-makers

Table 1. Relationship with Wales

Relationship with Wales	2022 research respondents (this report)	2020 research respondents	UK holiday market breakdown*
I often take short breaks or holidays there and intend to do so again within the next year	47%	42%	15%
I sometimes take short breaks or holidays there and intend to do so again in the next couple of years	31%	29%	14%
I have taken a short break or holiday there once or twice before and might do so again	19%	23%	26%
I have never been on a holiday or short break there but would like to	3%	6%	20%
I have taken a short break or holiday there before, but am unlikely to do so again	1%	<1%	8%
I have never taken a short break or holiday there before and am not likely to in the future	<1%	<1%	8%
I don't know	<1%	<1%	9%

*Market breakdown is based on research conducted amongst a nationally representative sample of UK trip-takers in January 2020

Sample considerations/3

Table 2. Age profile

Age profile	2022 research respondents (this report)	2020 research respondents	UK holiday market breakdown*
16-34	3%	7%	26%
35-54	26%	35%	41%
55-64	33%	31%	9%
65+	38%	26%	23%

Table 3. Visit Wales Segment Profile

Visit Wales segment profile	2022 research respondents (this report)	2020 research respondents	UK holiday market breakdown*
Scenic explorer couples	36%	30%	6%
Older cultural explorer couples	24%	23%	2%
Pre-family explorers	15%	18%	6%
Budget family	7%	11%	14%
Active family explorers	4%	6%	6%
Comfort and quality empty nesters	5%	4%	20%
Older, less well-off	4%	3%	11%
Younger, less well off	2%	5%	22%
Young, sun, fun	1%	2%	9%

*Market breakdown is based on research conducted amongst a nationally representative sample of UK trip-takers in January 2020

Sample considerations/4

Table 4. Region of origin

Region of residence profile	2022 research respondents (this report)	2020 research respondents	UK holiday market breakdown*
North West of England	17%	16%	11%
South East England	15%	16%	14%
West Midlands	15%	14%	9%
London	10%	8%	13%
South West of England	10%	12%	8%
East Midlands	8%	7%	7%
Yorkshire and The Humber	7%	6%	8%
East of England	7%	7%	9%
North East of England	2%	2%	4%
Scotland	4%	3%	8%
Wales	3%	6%	5%
Northern Ireland	1%	1%	3%
Other	1%	1%	0%

*Market breakdown is based on research conducted amongst a nationally representative sample of UK trip-takers in January 2020

Definitions used within this report

Throughout the report we use a number of definitions. 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+.

For ease of analysis the following accommodation definitions are used:

- **Hotel/Motel/Inn**
- **Guest house/B&B/Farmhouse**
- **Rented property or serviced apartment:** Rental holiday flat/apartment, Rented holiday home or Serviced Apartment
- **Private home:** Second home/time share or Friends/relative's home or In someone else's private home on a commercial basis (e.g. Airbnb)
- **Caravan/Camping/Glamping:** Touring caravan or Campervan/Motorhome or Static Caravan or Tent or Glamping/Alternative
- **Other accommodation:** Hostel or other type of accommodation

Key findings



Key findings (1)

Profile of Visit Wales Enquirers

1. Almost all (97%) Visit Wales enquirers have been to Wales for a short break or holiday at some point in their lives, with around half (47%) 'often taking short breaks or holidays there and planning to do so again in the next year', and a further 3 in 10 (31%) 'sometimes taking short breaks or holidays there and intending to do so in the next couple of years'.
2. Visit Wales enquirers tend to belong to 'older' life stages, 'older independents' making up nearly half (at 49%), and enquirers of 'retirement age' 2 in 5 (38%). Almost half (47%) describe their employment status as 'retired', with a third (32%) in full time employment. Perhaps indicating a high disposable income, almost half of enquirers belong to social grades AB.
3. Enquirers are spread across the UK, but there is a clear bias towards regions in relatively close proximity to Wales, the North West of England and West Midlands with the highest and third highest representation. Wales residents have relatively low representation, perhaps reflecting their existing familiarity with Wales as a trip destination (and a lower need to sign up to Visit Wales communications).
4. Visit Wales' priority segments make up nearly 9 in 10 of all enquirers, with 'scenic explorer couples' and 'older cultural explorer couples' making up 3 in 5. Priority family segments ('budget families' and 'active family explorers') make up 1 in 9 of all enquirers.

2021 trip conversion and trip characteristics

1. Half of Visit Wales enquirers took a trip to Wales in 2021, with an equal split of around a third each taking short breaks of 1-3 nights and longer breaks of 4+ nights. Wales trip-takers took 3.2 trips to Wales on average, short breaks marginally more frequent. Despite taking over 3 trips to Wales on average, Wales trip-takers stated they took fewer trips to Wales in 2022 as a result of the pandemic.
2. The incidence of trips taken to Wales is relatively consistent across life stages and priority segments with the exception of retirees and 'older cultural explorer couples' who were less likely to have done so, and were the only groups with lower representation amongst trip-takers than amongst all enquirers. This is consistent with findings from 2019 and other research conducted by Visit Wales, which demonstrates that older age correlates strongly with lower travel confidence during the pandemic.

Key findings (2)

3. Proximity to Wales correlates strongly with likelihood of having taken a trip to Wales, residents of Wales, West Midlands, the North West and the South West the most likely to have done so – the West Midlands and the North West indexing higher than their fall-out amongst all enquirers.
4. Wales trip-takers were most likely to have taken their Wales trip in September, although there was significant difference across segments - over half of each 'family segment' taking a trip in August, with 'non-family segments' the most likely to take a trip in September.
5. 'Camping or caravan' was the preferred accommodation type amongst Wales trip-takers in 2021 (driven by campervan/motorhome), followed by 'rented property or serviced apartment' (driven by 'rented house/cottage'). Across segments 'older cultural explorer couples' were more likely to have stayed in a hotel than any other accommodation type, and than any other segment. 'Active family explorers' were more likely to have stayed in a 'rented property or serviced apartment'. 'Budget families' were the most likely to have stayed in 'camping/caravan' accommodation, driven by 'static caravan – not owned by you'. 'Scenic explorer couples' and 'pre-family explorers' were also most likely to have stayed in 'camping/caravan' accommodation, but this was driven by 'campervan/motorhome' trips.
6. For the majority of Wales trip-takers, booking accommodation for their 2021 trip was either very or fairly easy. However, this was less likely to be the case for those choosing 'camping or caravan', driven by trip-takers staying in a 'campervan/motorhome', who were also least likely to state they were able to stay in their first choice accommodation. Unsurprisingly there was a strong correlation between 'being unable to stay in first choice accommodation' and finding booking accommodation 'difficult'. The two areas also correlate with experience satisfaction on the trip to Wales, those that couldn't stay in their first choice accommodation, significantly more likely to rate their whole trip experience as 'poor'.
7. 'Countryside or village' was the leading destination type for Wales trips in 2021, although only just ahead of 'traditional coastal/seaside town' and 'rural coastline'. Unsurprisingly, there was variation across segments, 'older cultural explorer couples' and 'scenic explorer couples' indicating 'countryside or village' was their first choice and family/pre-family segments, 'traditional coastal/seaside town'.
8. The 'active' nature of Visit Wales enquirers is underlined with the vast majority having conducted 'sightseeing or exploring areas' on their 2021 trip, and a large minority having visited a visitor attraction or taken part in outdoor leisure or sports activities. Across segments, activity aligned with their key characteristics, 'pre-family explorers' the least likely to have gone to a visitor attraction, with 'active family explorers' the most likely to have taken part in outdoor leisure or sports activities. 'Older cultural explorer couples' showed the highest likelihood of visiting 'arts, cultural or entertainment' experiences.
9. Despite reporting 'active trips' to Wales, nearly half of trip-takers stated that the pandemic meant they visited fewer bars, pubs or restaurants, 3 in 10 that they visited fewer visitor attractions and 1 in 7 that they avoided activities they would usually consider.

Key findings (3)

10. Overall, Wales trip-takers were satisfied with their Wales trip, two thirds rating it as excellent and 95% as good/excellent, with minimal differences by Visit Wales segments.
11. At a more granular level, Wales trip-takers were the most satisfied with the 'quality of the natural environment' in Wales, followed by 'places to visit', 'the welcome received', and 'cleanliness of beaches'. Satisfaction was lowest with 'the availability of public toilets', 'the cost of car parking' and 'the availability of public transport'.
12. Notably, given the proportion of enquirers still put off travelling due to the pandemic, 3 in 5 were 'very satisfied' with 'policing of COVID-19 protocols' – but only half were satisfied with 'adherence to COVID-19 measures from the public'.

Trip characteristics by destination

1. 'Snowdonia Mountains and Coast' was the part of Wales trip-takers were most likely to have stayed in on their 2021 trip, consistent across each Visit Wales segment. Snowdonia was followed by Pembrokeshire, and 'Mid Wales and the Brecon Beacons'. Budget families' were the least likely to have stayed in 'Mid Wales and the Brecon Beacons', while 'active family explorers' were the most likely to have stayed in 'Llandudno & Colwyn Bay' and North East Wales.
2. The region of origin of trip-takers to Wales destinations tends to reflect proximity to that destination. For example, nearly 1 in 4 visitors to 'Snowdonia Mountains and Coast' live in the North West of England, with a similar proportion of visitors to Ceredigion living in the West Midlands. Trip-takers to Wye Valley or Glamorgan Heritage Coast are more likely to live in the South East of England.
3. Ratings of the Wales visit experience were highest for trip-takers who visited Pembrokeshire (65% rating it as excellent), North East Wales (64%) and Cardiff (63%). A range of other destinations also received high 'excellent' ratings. Although 'Wye Valley/Vale of Usk' and 'Glamorgan Heritage Coast' received the lowest ratings, the vast majority still rated these destinations as at least 'good'.

Key findings (4)

Reasons for not taking trips to Wales in 2021

1. Of the enquirers that did *not* visit Wales in 2021, around half were considering visiting Wales, equally split between those that didn't go anywhere, and those that decided to visit somewhere else in the British Isles instead. It is worth noting that this marks a departure from 2019 when the proportion 'that didn't go anywhere' was significantly lower. Of those that went elsewhere in the British Isles instead, the West Country was the number one alternative destination, with Scotland and Yorkshire close behind.
2. COVID-related barriers made up the top 3 reasons that people didn't take a holiday or short break in Wales in 2021, 'it wasn't responsible to travel at that time', 'government restrictions in Wales made a trip less appealing', and 'had concerns about catching COVID-19' all featuring. Reasons relating to Wales' product or infrastructure (e.g. it's difficult to travel to or around Wales) were only stated by a minority.
3. Perhaps explaining why they indexed lower on trip conversion than other segments, 'older cultural explorer couples' were the most likely to cite 'COVID-related reasons' as explaining why they didn't take a trip in Wales in 2021.

General trip plans for 2022

1. Compared to before the pandemic, Visit Wales enquirers anticipate taking 'net more' UK overnight trips in the next 12 months compared to the previous 12 months, and prioritising holidays in the UK instead of overseas – consistent across all segments.
2. Notably, enquirers anticipate continuing their behaviour from 2021 by choosing quieter places to visit in the UK and taking UK holidays at less busy times – shared across segments. There is also a desire to 'visit places closer to home on UK holidays', further underlining the impact that proximity of residence is likely to have on who visits Wales for their overnight trips.
3. Perhaps further reflecting continued concerns around COVID-19, Visit Wales enquirers describe themselves as 'less likely' to use public transport at or to travel to their UK holiday destination.

Key findings (5)

Intention to take a trip in Wales in 2022

1. 20% of Visit Wales enquirers have already booked a Wales trip in 2022, with 31% 'definitely going' but without having yet booked. A further 25% state they will probably go, meaning 76% are open to visiting.
2. The profile of 2022 trip-intenders is broadly similar to 2021 trip-takers, residents of the North West and West Midlands indexing higher than all enquirers, and 'older cultural explorer couples' below. However, perhaps indicating growing confidence, 'older cultural explorer couples' index above 2021 trip-takers.
3. Also similar to 2021, Wales 2022 trip-intenders are most likely to take their trip in September, followed by May and June. However, there appears to be a higher spread across months earlier in the year in 2022 (than in 2021), perhaps linked to concerns around the pandemic being lower, and fewer restrictions in place. Consistent with trips taken in 2021, 'family segments' are most likely to take their Wales trip during the summer holidays, with non-family segments most likely to do so in September. Notably, 'active family explorers' are the most likely to take trips in April and October (likely during Easter and half-term)
4. The vast majority of Wales 2022 trip intenders are likely to take their trip with their partner (75%). 1 in 4 (26%) anticipate doing so with children, a further 1 in 5 (20%) with their pets. Unsurprisingly, there is considerable variation across segments.
5. Wales trip-intenders show a relatively equal intention to take an overnight 2022 trip to 'rural coastline', a 'countryside or village' or a 'traditional coastal/seaside town' – around half planning a trip to each. 'Mountains or hills' are also of interest to a high proportion of intenders.
6. Across priority segments, there are some variations in intended destination type, 'family' and 'pre-family' segments the most likely to intend to visit a 'traditional coastal/seaside town'. 'Active family explorers' demonstrate a higher interest than 'budget families' in 'mountains or hills', matched only by 'scenic explorer couples'.
7. Similar to trips taken in 2021, the most popular Wales destination for a 2022 trip is Snowdonia, consistent across segments, in particular Active Family Explorers. Snowdonia is followed by Pembrokeshire and the Isle of Anglesey.
8. Similar to trips taken in 2021, camping or caravan is the leading accommodation type for intended Wales trips in 2022 (driven by campervan/motorhome and 'static caravan – not owned by you'), followed by 'rented property or serviced apartment'. 'Older cultural explorer couples' are most likely to anticipate staying in a hotel, whilst 'budget families', 'pre-family explorers' and 'scenic explorer couples' are most likely to choose 'camping or caravan'. As with trips taken, 'budget families' high preference for 'camping or caravan' is driven by intention to stay in 'a static caravan – not owned by you' or a tent, whilst for 'scenic explorer couples' and 'pre-family explorers' it is campervan/motorhome'.

Key findings (6)

9. 'Visiting heritage sites', 'trying local food and drink' and 'walking, hiking or rambling' are the three activities Wales 2022 intenders are most likely to do on their Wales trip. Unsurprisingly, there is significant variation in anticipated activities on Wales trip by segment – 'older cultural explorer couples' most likely to visit heritage sites/cultural attractions and to learn about local history and culture; family segments most likely to visit family attractions.
10. Events interest is relatively consistent across segments, although 'older cultural explorer couples' and 'scenic explorer couples' are significantly less likely than other segments to be interested in events that involve live music, comedy, activities or sports.

Barriers to visiting Wales in 2022

1. There is no stand-out reason that non-Wales intenders are not considering Wales for a trip in 2022, 'personal reasons' the leading barrier. Perhaps positively, 'COVID-related reasons' do not dominate in the same way that they did 'reasons for not visiting in 2021'.
2. Of those that do not intend to visit Wales in 'off-peak' months, 'the weather' was the most dominant reason.

Marketing evaluation

1. Perhaps unsurprisingly given the method of recruitment for this research, Visit Wales e-newsletters was the channel of communication enquirers were most likely to have engaged with in 2021, followed by the Visit Wales website. 3 in 10 enquirers had engaged with Visit Wales social media, driven by likes/follows of their Facebook page.
2. In total, 1 in 7 (14%) of Visit Wales enquirers had *definitely* seen either a TV advert or digital advert in the previous 3 months, rising to nearly half (46%) *definitely or possibly* seeing it.
3. Marketing has a positive impact on perceptions of Wales, a majority stating it 'paints Wales in a very positive light' 'makes Wales look very appealing for holiday or short break in the autumn/winter' (74%). A majority also agree 'it will make people more likely to consider Wales for a holiday or short break'.
4. At an implicit level, off-peak marketing may have had a positive impact – those that *definitely* recall seeing it, were more likely to consider Wales for an off-peak trip.

Key findings (7)

Attitudes to sustainability

1. Compared to the UK population, Visit Wales enquirers index significantly higher on BVA BDRC's 'Eco Evangelists' and 'Good Intentions' sustainability segments. Combined with a net anticipated increase in 'making sustainable holiday choices', this suggests that Visit Wales enquirers assign a high level of importance to sustainability.
2. Visit Wales enquirers are most likely to state that tourism businesses should prioritise 'a significant reduction in single use plastic', and 'opportunities for customers to recycle/reduce waste'. Local activity was also prominent - 'proactively supporting the local area', 'a commitment to sourcing and buying produce locally', 'a commitment to recruiting staff from the local area', and 'promoting understanding of the local area's history and culture' making up the remainder of the top six most important actions.
3. 'Employing people from different backgrounds' and 'employing local tour guides' were the sustainable actions enquirers think are least important to prioritise.
4. In terms of sustainable actions for the individual, Visit Wales enquirers are most likely to 'already do/would seriously consider even if less convenient / an extra cost' 'prioritising buying food from local producers', 'travelling off-peak instead of the peak season' and 'visiting less popular or less busy areas'. The openness to off-peak travel is likely driven by the older age bias of enquirers, and is not a reflection of the total market.
5. Visit Wales enquirers are least likely to be willing to 'travel to/around their destination in an electric car'. They are also less likely to use public transport instead of their own car.

Profile of Visit Wales Enquirers



Relationship with Wales and previous visits to Wales

- Nearly half (47%) of Visit Wales enquirers stated that they 'often take short breaks or holidays' in Wales and 'intend to do so again within the next year'. A further 3 in 10 (31%) *sometimes* take overnight trips in Wales and intend to do so again in the next couple of years. The vast majority (97%) of enquirers have visited Wales for a holiday or short break at some point in the past.

Figure 1. Relationship with Wales, Percentage, All Enquirers

- 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 never been on a holiday or short break there but would like to
- I have taken a short break or holiday there before, but am unlikely to do so again

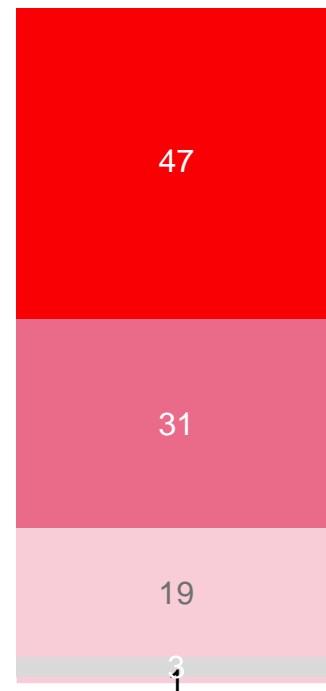
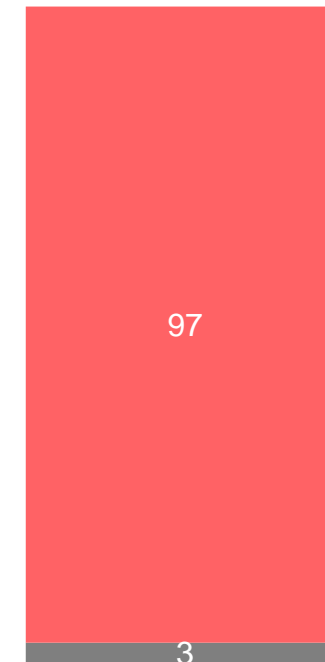


Figure 2. Previous visits to Wales, Percentage. All Enquirers

- Have visited Wales for a holiday or short break
- Never visited Wales for a holiday or short break



A1.Which of the following statements best applies to you when it comes to Wales? A2.Did you take a holiday or a short break in Wales in 2021? A3.Have you taken a holiday or short break in Wales prior to 2021?

Base: All Visit Wales enquirers n=4,522

Gender and life stage of enquirers

- Nearly 3 in 5 (58%) of Visit Wales enquirers who responded to the survey are female (trip-takers will have a more even balance as the majority of respondents are married/co-habiting), 2 in 5 (38%) fall into the retiree life stage, and nearly half (49%) older independents. Only 1 in 8 (13%) fall into the younger 'families' or 'pre-nesters' life stages.
- As illustrated within the methodology section of this report, the bias towards older life stages is predominantly driven by the sample source – other research demonstrates that Wales' full market has a more balanced profile.

Figure 3. Gender of enquirers, Percentage, All Enquirers

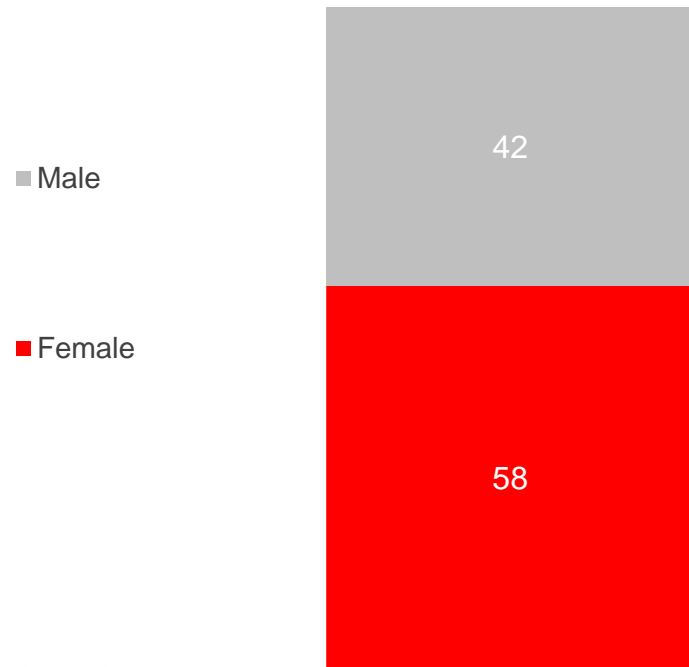
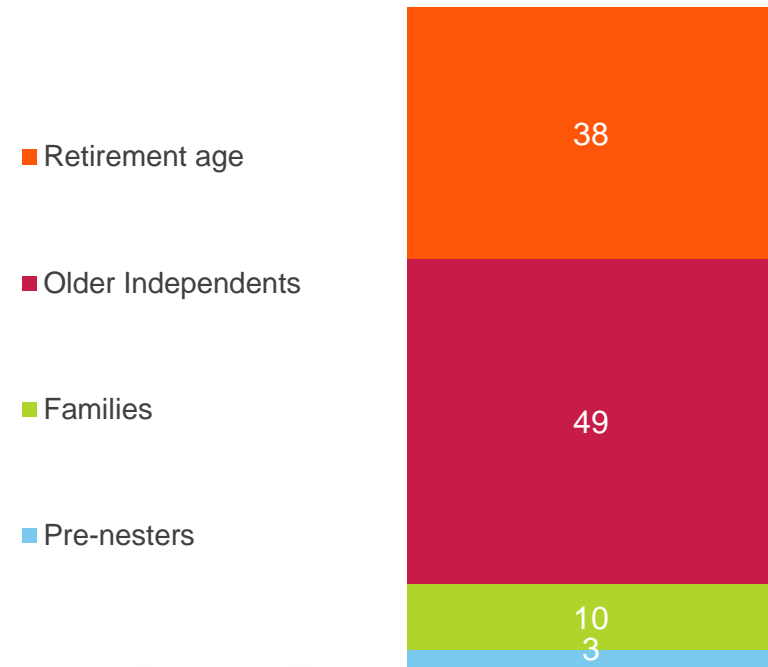


Figure 4. Life stage of enquirers, Percentage, All Enquirers



Employment status and social grade of enquirers

- Nearly half (47%) of Visit Wales enquirers have retired from employment, around a third (32%) are in full time employment. Enquirers are most likely to belong to social grades AB (47% falling into this category), a further 24% to social grades C1 – 71% belonging to social grades ABC1 in total.

Figure 5. Employment status of enquirers, Percentage, All Enquirers

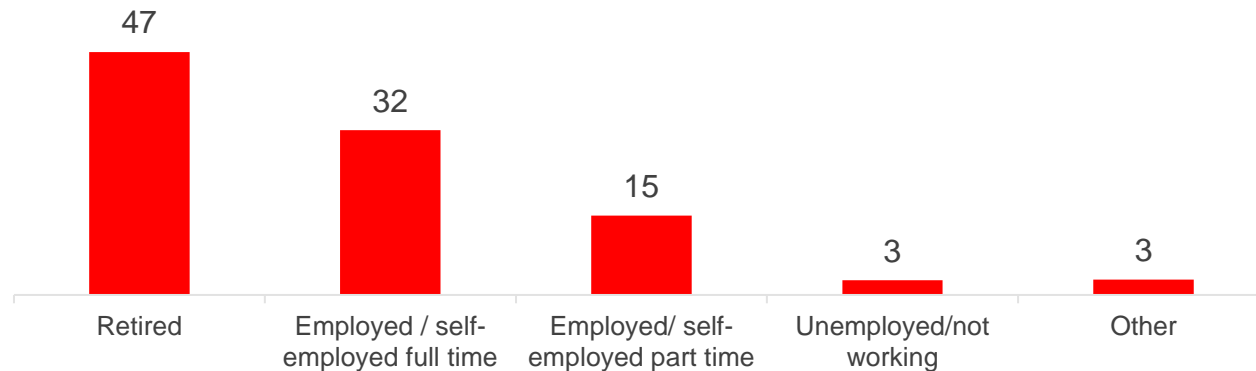
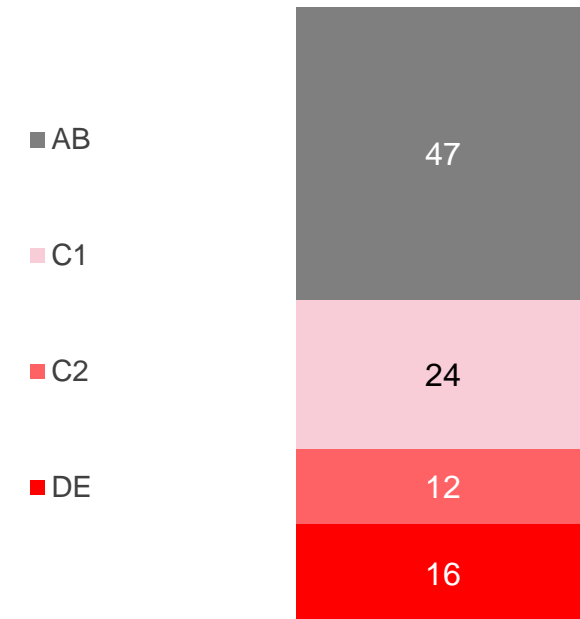


Figure 6. Social grade of enquirers, Percentage, All Enquirers



X3a.Which of these best describe you? X4a. Which one of these best describes the occupation of the main income earner in your household?

Base: All Visit Wales enquirers n=4,522

Region of residence of enquirers

- Visit Wales enquirers are from a range of regions across the UK. However, North West England, South East England and West Midlands are the leading areas of origin. Wales residents only make up a small minority.

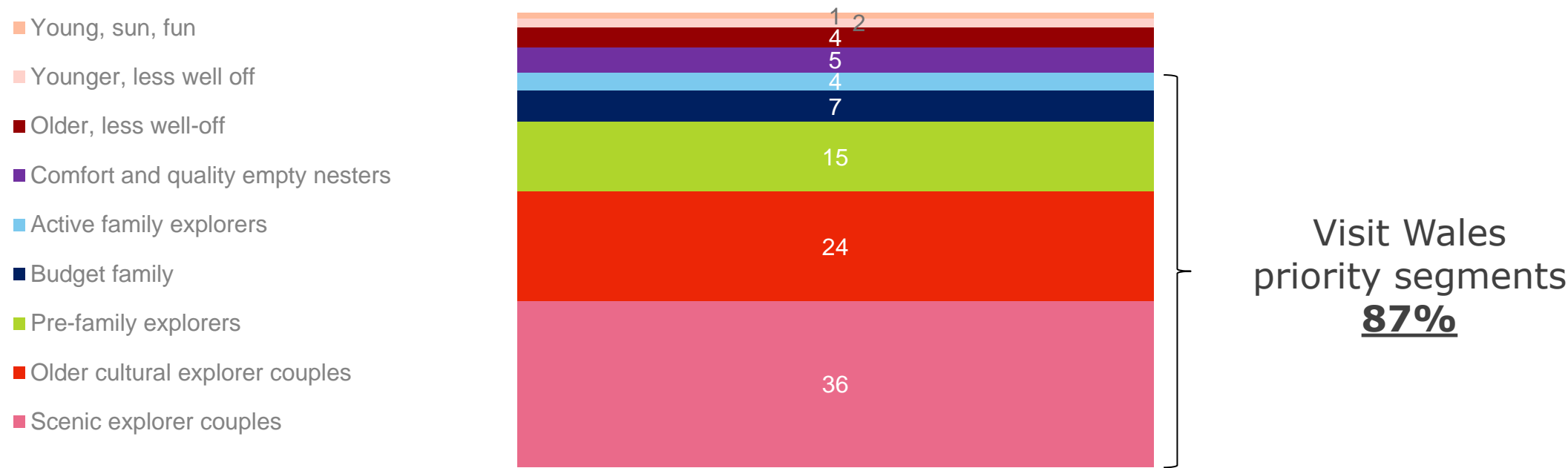
Figure 7. Region of origin of enquirers, Percentage, All Enquirers



Visit Wales segment breakdown of enquirers

- Enquirers are dominated by Visit Wales' 'priority segments' (accounting for 87%) - 'scenic cultural explorers' with the highest representation (36% of all enquirers), followed by 'older cultural explorer couples' (24%) and 'pre-family explorers' (15%).

Figure 8. Visit Wales Segment of enquirers, Percentage, All Enquirers



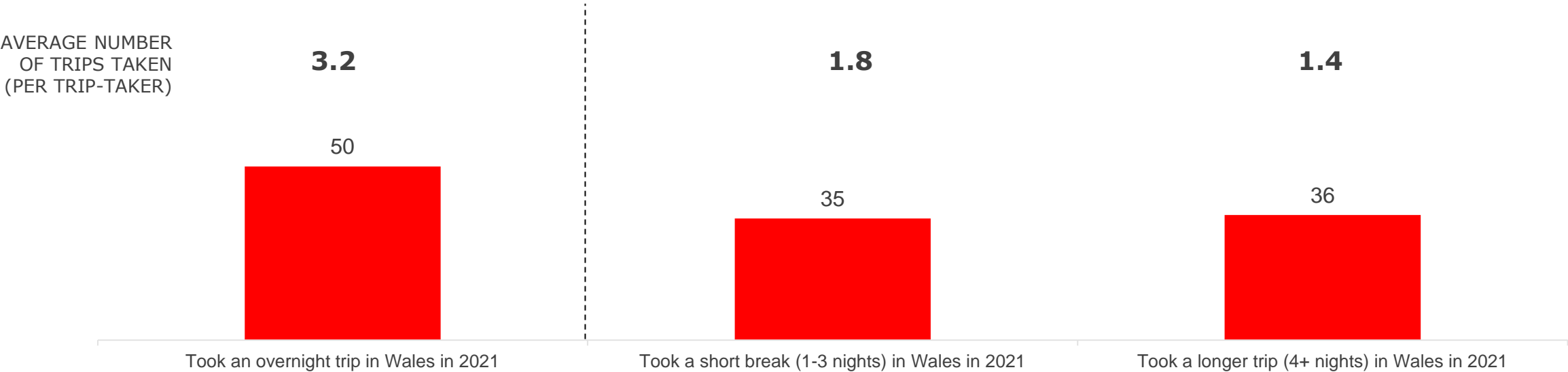
2021 trip conversion and trip characteristics



Whether took a short break or holiday in Wales in 2021

- Half (50%) of Visit Wales enquirers took an overnight trip in Wales in 2021, similar proportions taking a ‘short break of 1-3 nights’ (35%) and ‘a longer break of 4+ nights’ (36%).
- On average, Wales trip-takers took 3.2 trips to Wales in 2021 – 1.8 short breaks and 1.4 longer trips.

Figure 9. Whether took a short break or holiday in Wales in 2021 and average number of trips, Average and Percentage, All Enquirers.



A2.Did you take a holiday or a short break in Wales in 2021? A4.How many holidays or short breaks did you take in Wales in 2021?

Base: All Visit Wales enquirers n=4,522



Whether took a short break/holiday in Wales by life stage

- ‘Retiree’ enquirers are significantly less likely than any other life stage to have visited Wales in 2021, consistent with comparable research conducted in 2019. As such they are the only life stage to index lower amongst trip-takers than all enquirers.
- Amongst life stages other than retirees, a small majority visited Wales in 2021.

Figure 10. Whether took a holiday or short break in Wales in 2021 by life stage, Percentage.

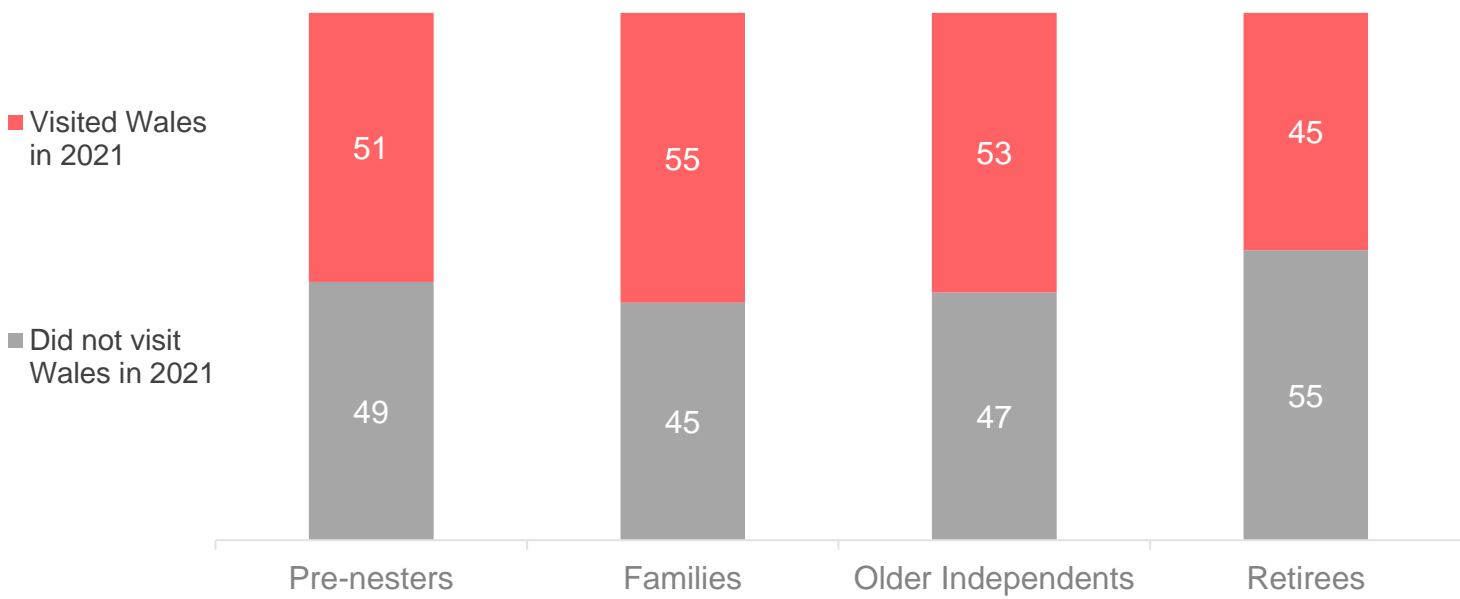
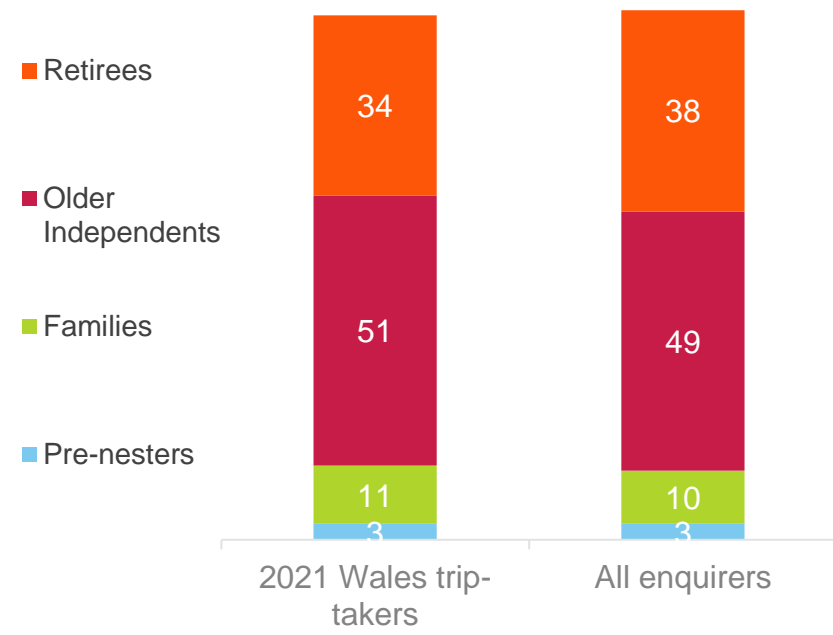


Figure 11. Breakdown of Wales 2021 trip-takers by life stage, Percentage.



A2.Did you take a holiday or a short break in Wales in 2021?
Base: Pre-nesters n=119; Families n=450; Older Independents n=2,2201; Retirees n=1,707. 2021 trip-takers n=2,264; All enquirers n=4,522



Whether took a short break/holiday in Wales by region of residence

- Proximity to Wales correlates with likelihood of having visited Wales for a holiday or short break in 2021, Wales resident enquirers the most likely to have done so, followed by enquirers from the West Midlands and North West of England.
- As a proportion of all 2021 Wales trip-takers, residents of the North West and Midlands have the highest representation – both above their fall-out amongst all enquirers.

Figure 12. Whether took a holiday or short break in Wales in 2021 by region of residence, Percentage.

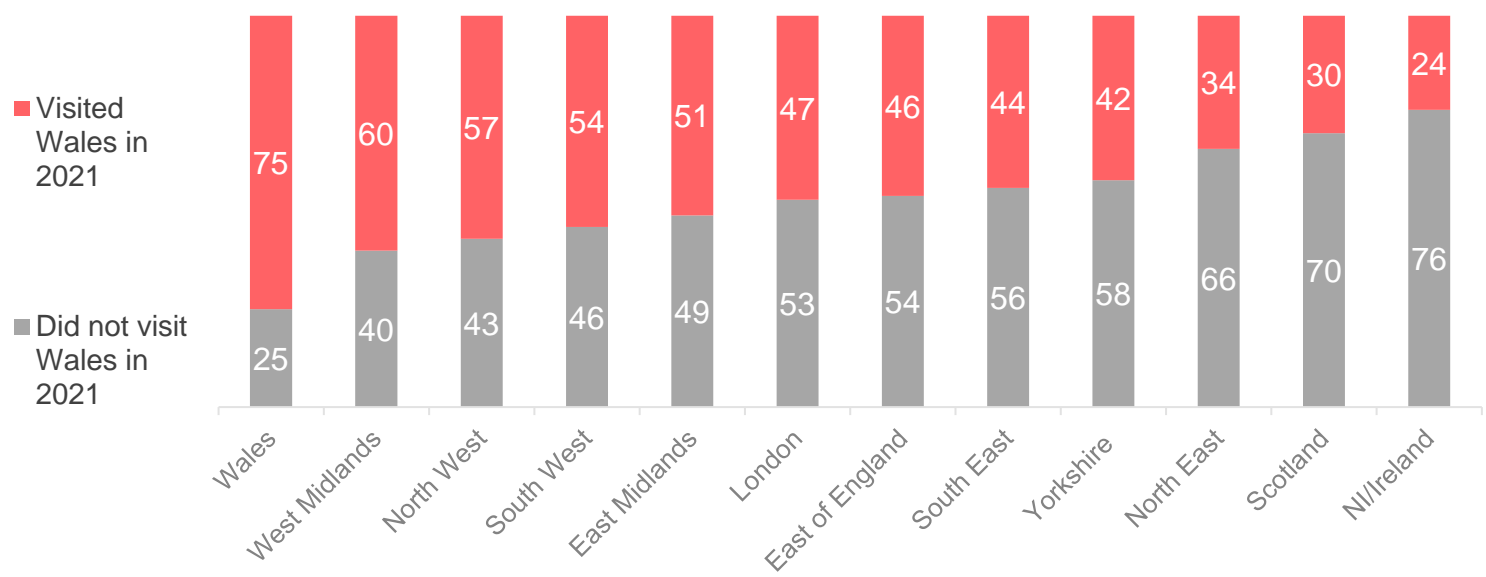
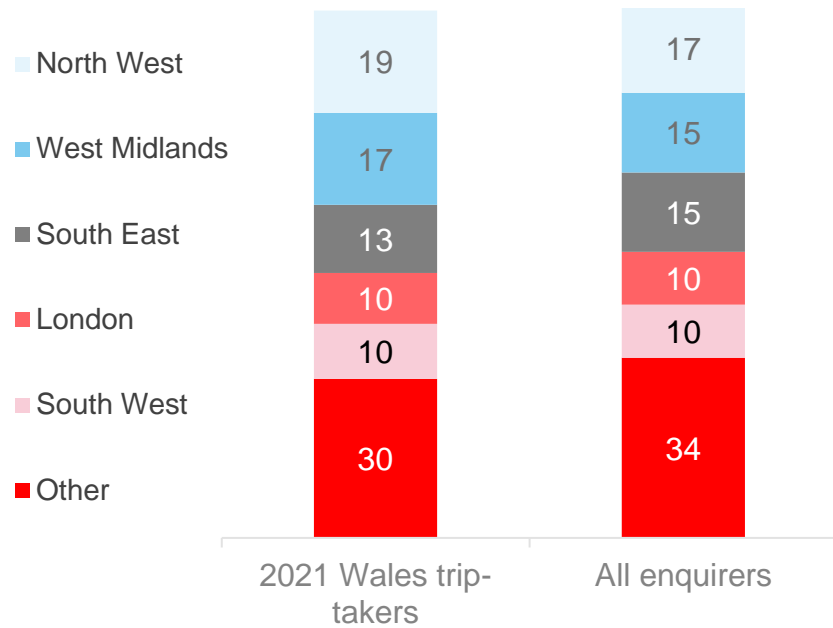


Figure 13. Breakdown of Wales 2021 trip-takers by region of residence, Percentage.



A2.Did you take a holiday or a short break in Wales in 2021?
Base: Wales n=144; West Midlands n=627; North West n=735; South West n=416; East Midlands n=339; London n=446; East of England n=300; South East n=628; Yorkshire and The Humber n=322; North East n=91; Scotland n=165; Northern Ireland (NI)/Ireland n=95. 2021 trip-takers n=2,264; All enquirers n=4,522



Whether took a short break/holiday in Wales by segments

- Of Visit Wales’ ‘priority segments’, ‘older cultural explorer couples’ are the only segment where a majority *did not* visit Wales in 2021, and who index lower than their fallout amongst all enquirers. This is likely driven by age, ‘older cultural explorer couples’ are the most likely to fall into the ‘retiree’ life stage.

Figure 14. Whether took a holiday or short break in Wales in 2021 by Visit Wales segment, Percentage.

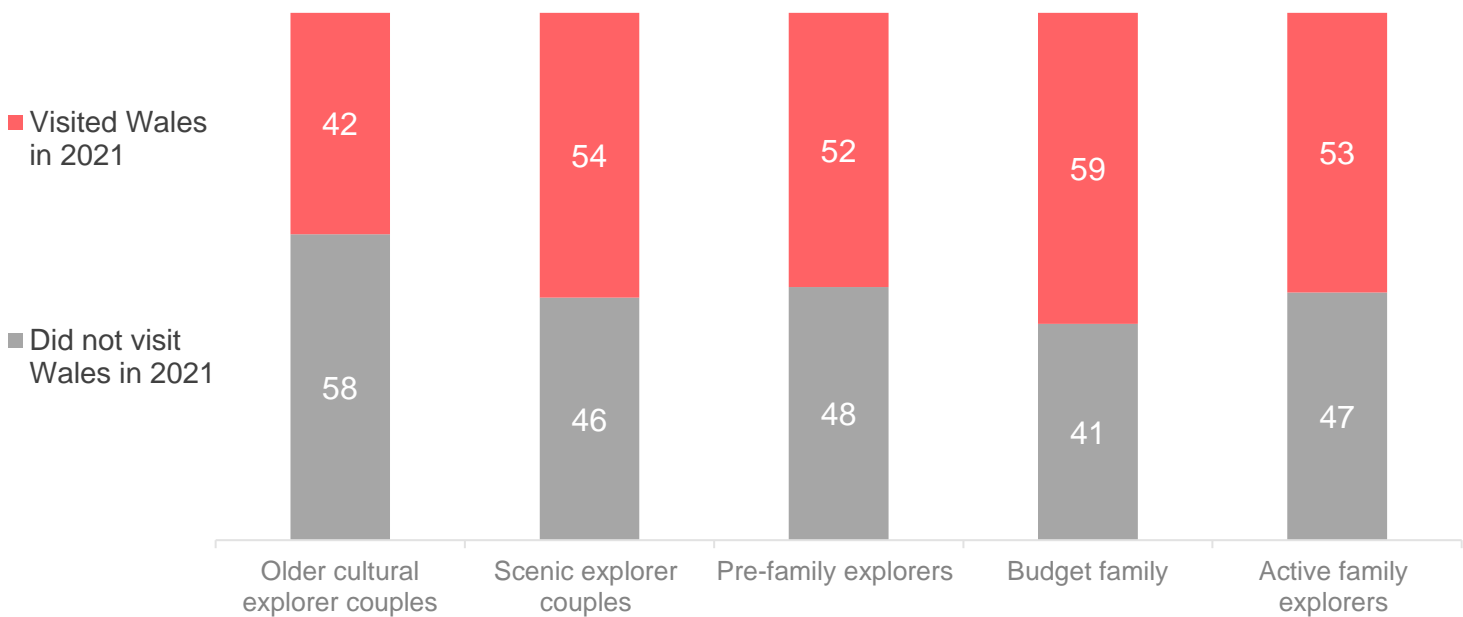
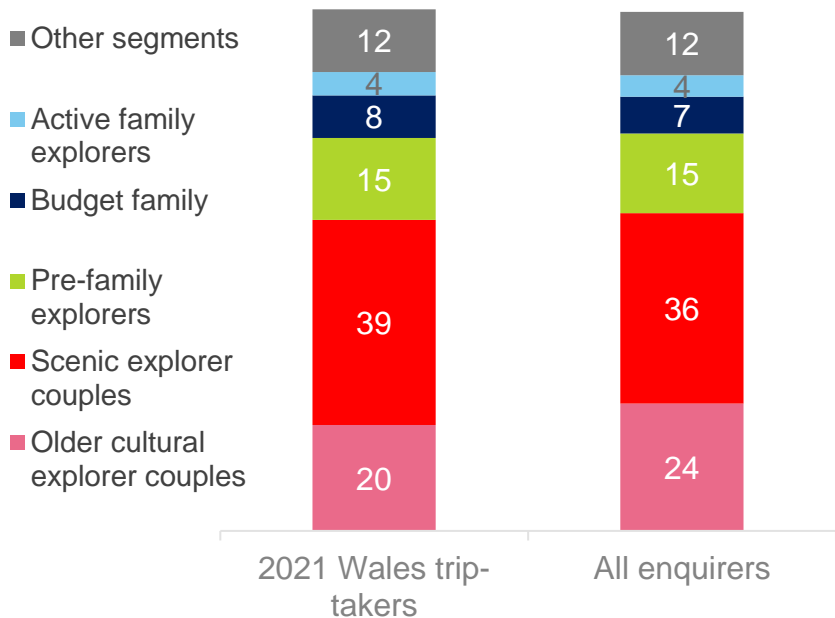


Figure 15. Breakdown of Wales 2021 trip-takers by Visit Wales segment, Percentage.



Extent to which Wales was first-choice destination

- For the vast majority (91%) of enquirers that visited Wales in 2021, Wales was the first choice destination. However, a small, but notable minority (8%) chose Wales as a replacement for an overseas trip, rising for ‘active family explorers’.

Figure 16. Extent to which Wales was first-choice destination, Percentage

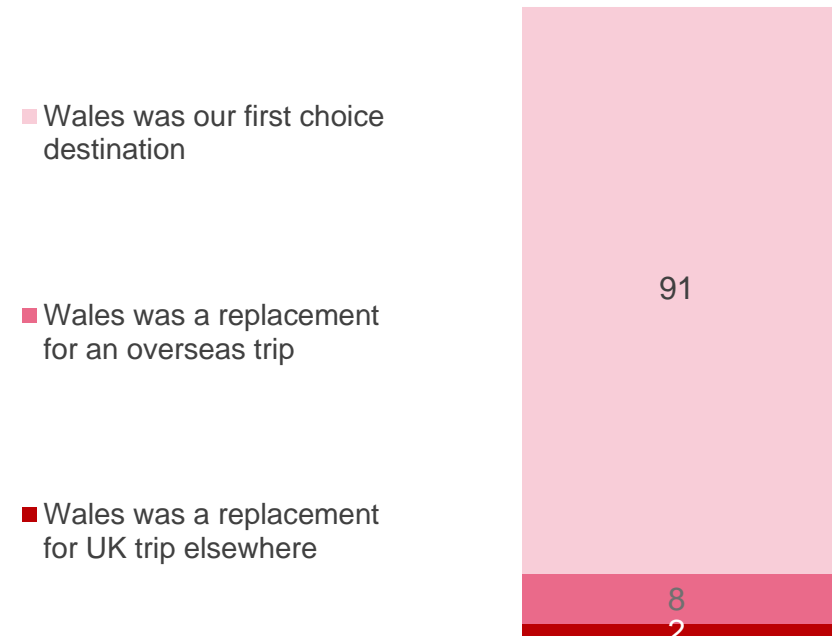
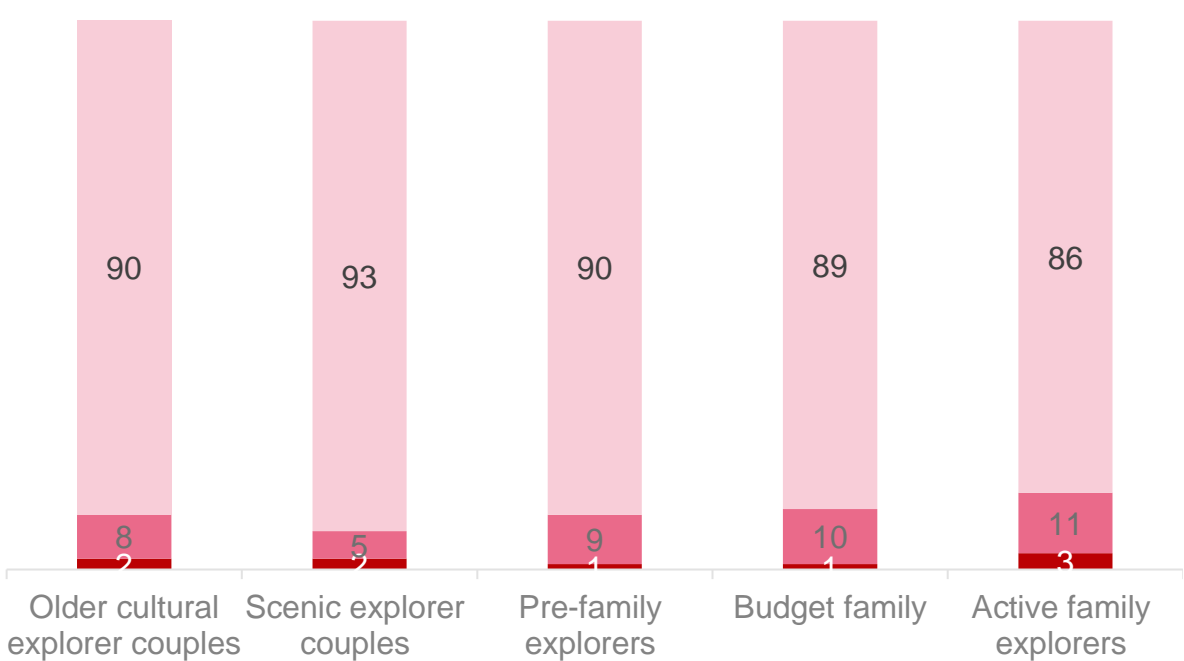


Figure 17. Extent to which Wales was first-choice destination, Percentage, By Visit Wales segments



A6. Which, if any, of these statements best apply to your trip in Wales in <INSERT MONTH>?
Base: All Wales trip-takers n=2,264; Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99



Impact of COVID-19 on number of overnight trips in Wales

- On balance, the pandemic depressed the number of short breaks or holidays Wales trip-takers took in Wales – 44% stating that they took fewer compared to 9% taking more. This pattern is consistent across each of Visit Wales’ priority segments.

Figure 18. Impact of COVID-19 on number of overnight trips in Wales, Percentage,

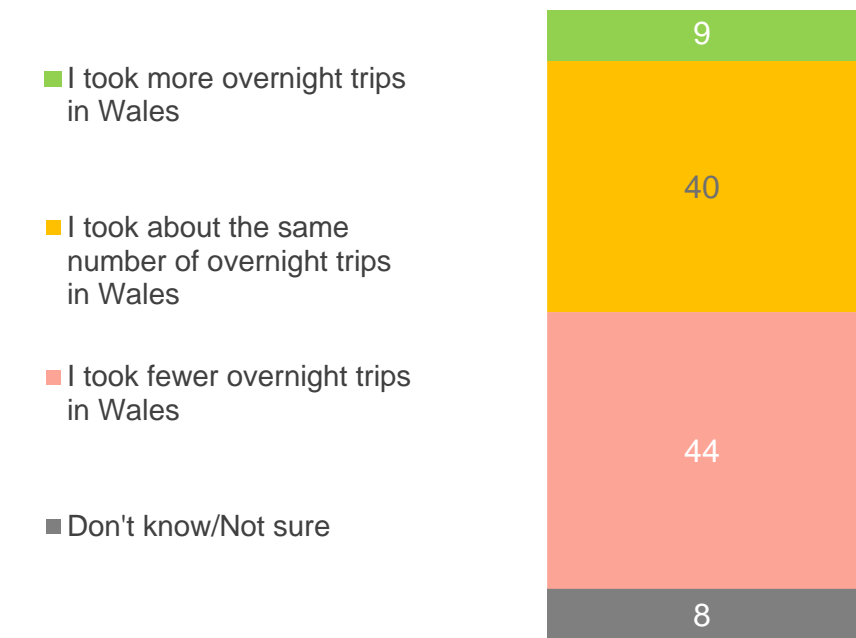
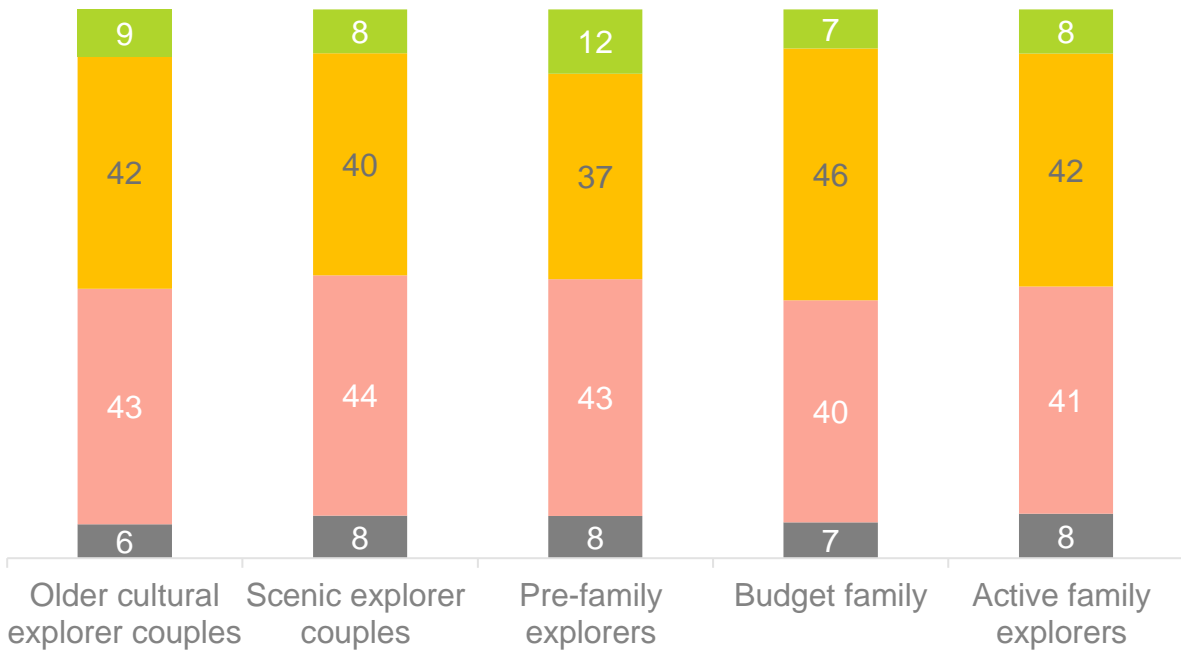


Figure 19. Impact of COVID-19 on number of overnight trips in Wales, Percentage, By Visit Wales segments



A13b. And how would you say the pandemic and/or government restrictions impacted the number of holidays and short breaks you took in Wales in 2021?

Base: All Wales trip-takers n=2,264; Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99



Impact of COVID-19 on number of day trips in Wales

- The pandemic also depressed the number of day trips Wales overnight trip-takers took in Wales – 45% taking fewer, compared to 6% taking more. Again, this pattern is consistent across each of Visit Wales’ priority segments.

Figure 20. Impact of COVID-19 on number of day trips in Wales, Percentage, All Wales trip-takers

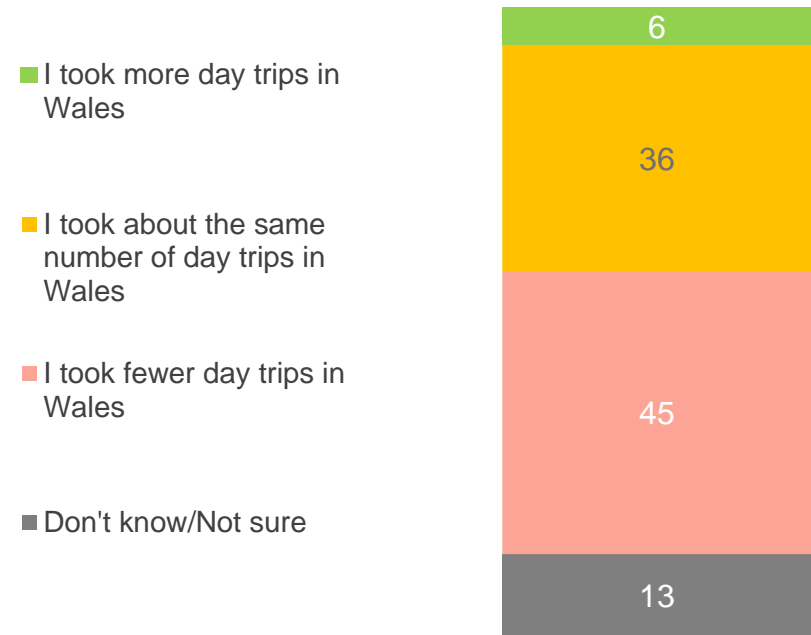
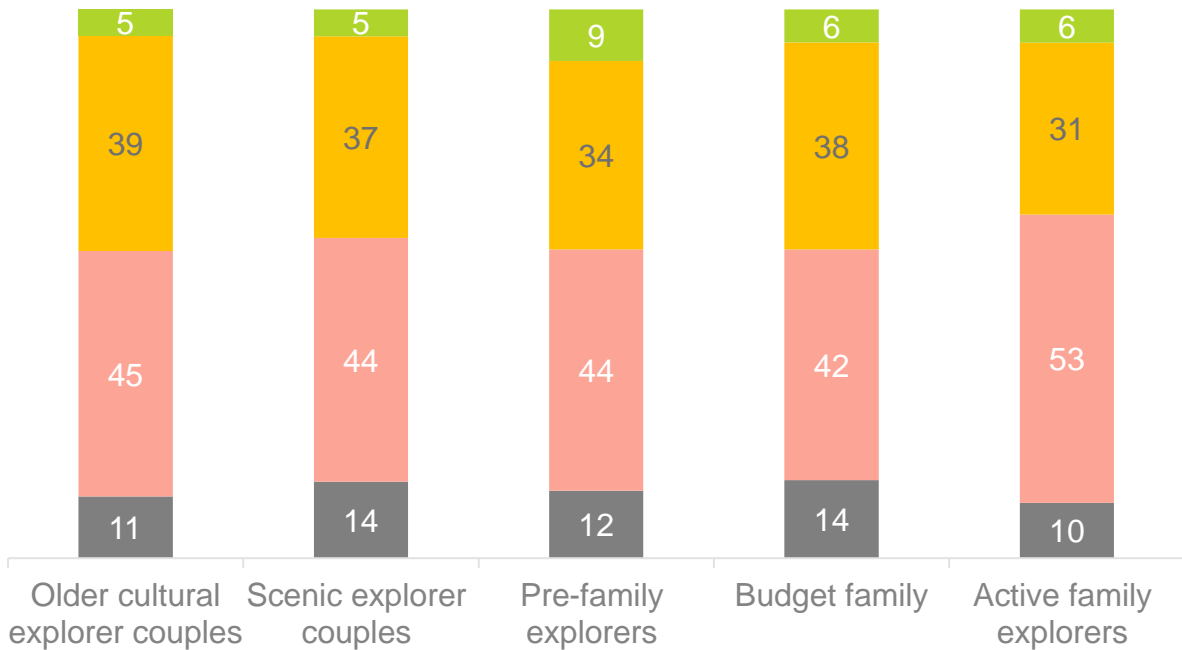


Figure 21. Impact of COVID-19 on number of day trips in Wales, Percentage, By Visit Wales segments



A13c. And how would you say the pandemic and/or government restrictions impacted the number of day trips you took?

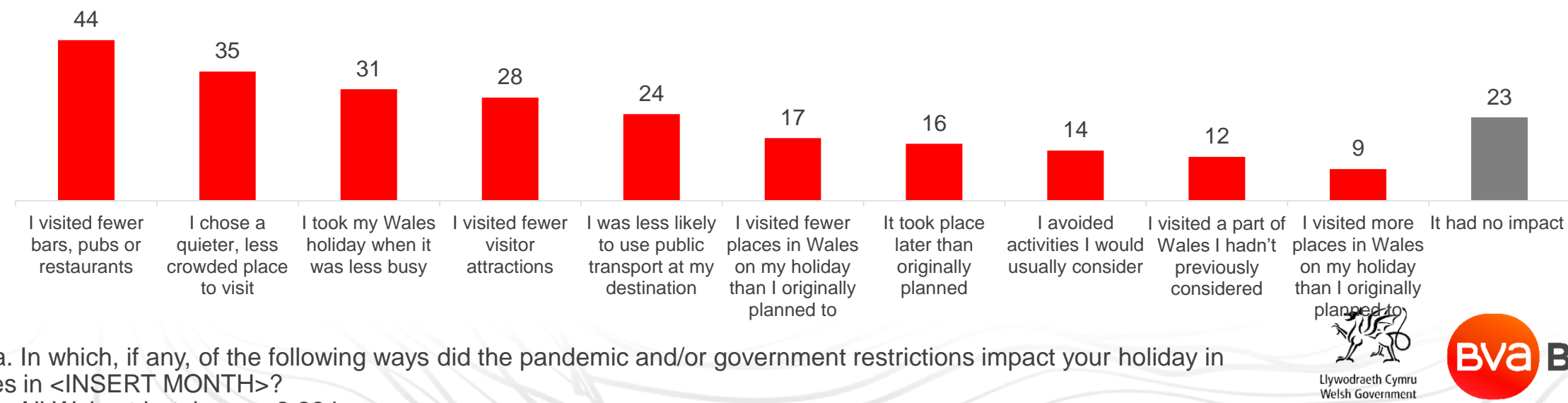
Base: All Wales trip-takers n=2,264; Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99



Impact of COVID-19 on Wales 2021 trip

- On a more granular level, the pandemic was most likely to have led to Wales trip-takers visiting ‘fewer bars, pubs or restaurants’ (44% stating this), choosing ‘a quieter, less crowded place to visit’ (35%) or visiting Wales ‘when it was less busy’ (31%). Around 3 in 10 (28%) also visited fewer attractions and 1 in 4 (24%) were less likely to use public transport at their destination. All of these reasons score highest amongst trip-takers from the ‘retiree’ life stage.
- For 1 in 8 visitors (12%), the pandemic meant that they visited places in Wales they hadn’t previously considered. Around 1 in 4 (23%) stated the pandemic had no impact on their overnight trip in Wales.

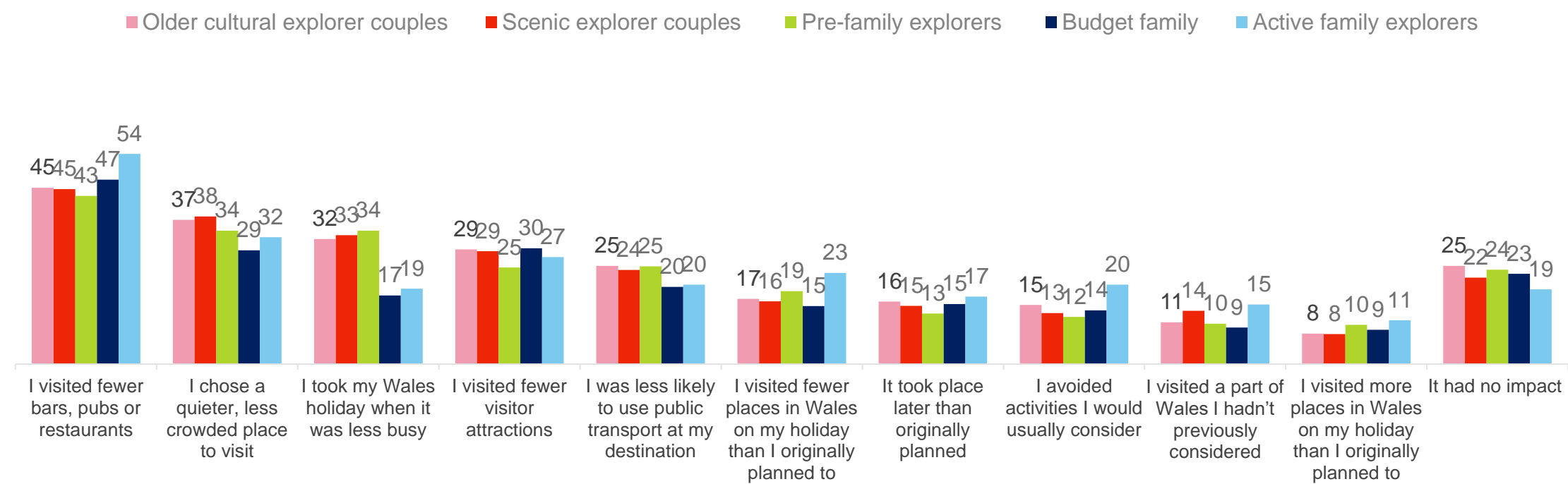
Figure 22. Impact of COVID-19 on domestic overnight trips, Percentage, Top 10



Impact of COVID-19 on Wales 2021 trip by segment

- For all priority segments, visiting ‘fewer pubs, bars and restaurants’ was the main impact on their trip in Wales, although this was mostly the case for ‘active family explorers’ who were also the most likely to have visited fewer places in Wales and to have avoided activities they would usually consider.
- Family segments were the least likely to take their Wales holiday when it was less busy, perhaps governed by school holidays.

Figure 23. Impact of COVID-19 on domestic overnight trips, Percentage, All Enquirers



A13a. In which, if any, of the following ways did the pandemic and/or government restrictions impact your holiday in Wales in <INSERT MONTH>?

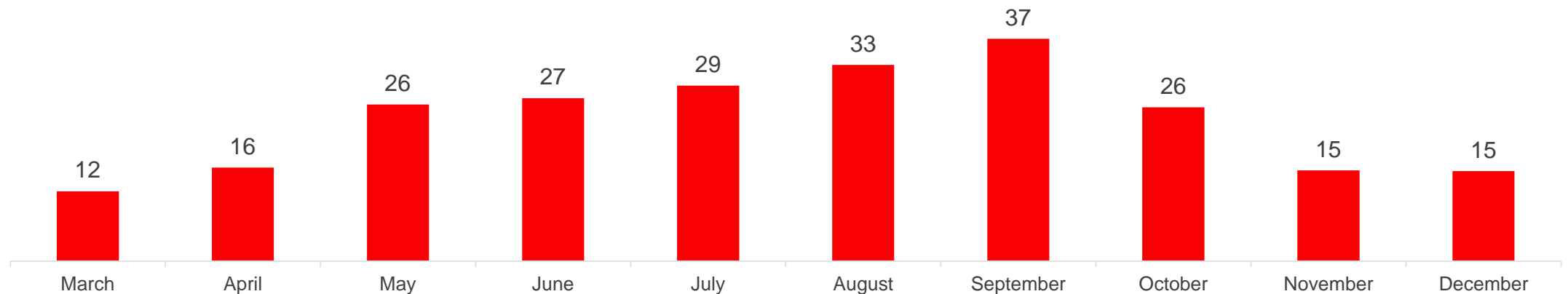
Base: Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99



Month trip taken in Wales in 2021

- A high proportion of Wales trip-takers took their trips in the Autumn months – over a third (37%) in September (the month with the highest incidence of trips taken) and more than a quarter in October (26%). Only a small proportion of trip-takers took their trip in Wales in March and April, when government restrictions were just being eased.
- It's worth noting that this pattern will be influenced by the impact of government restrictions earlier in the year, and the older age profile of respondents, who are less likely to take trips in peak months.

Figure 24. Month trip taken in Wales in 2021, Percentage.



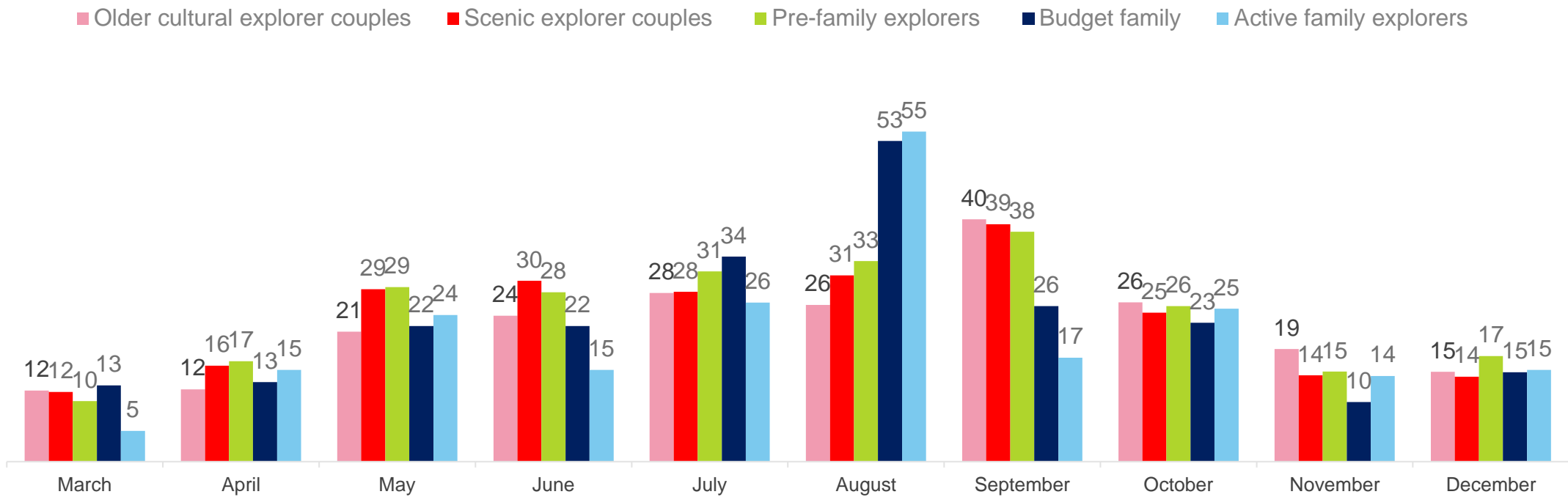
A5.And in which months of the year did you visit Wales for a short-break or holiday in 2021?

Base: All Wales trip-takers n=2,264

Month trip taken in Wales in 2021 by Visit Wales segment

- The month trips were taken to Wales varies by segment – most notably, over half of each ‘family segment’ taking a trip in August, with ‘non-family segments’ the most likely to take a trip in September.

Figure 25. Month trip taken taken in Wales in 2021, Percentage, By Visit Wales segment

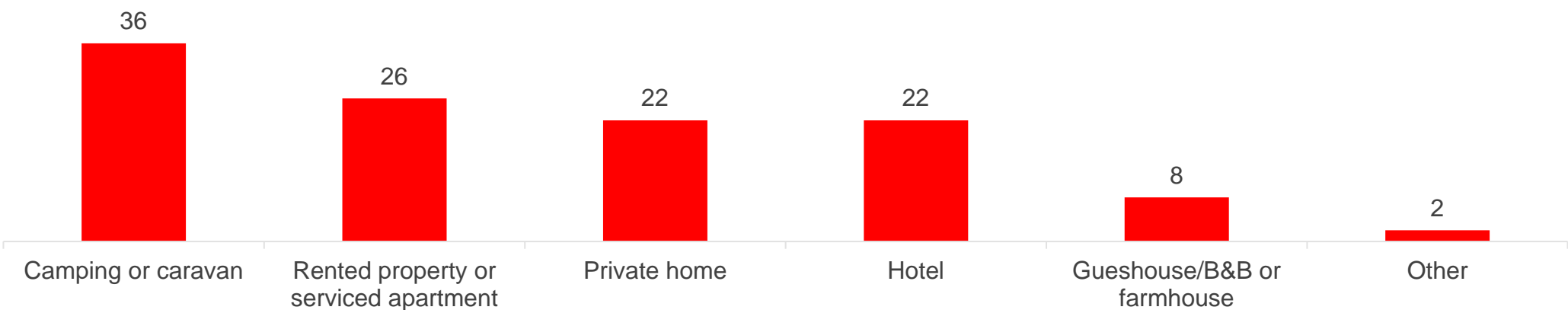


A5.And in which months of the year did you visit Wales for a short-break or holiday in 2021?
Base: Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99

Accommodation stayed in during Wales trip

- ‘Camping or caravan’ was the preferred accommodation type amongst Wales trip-takers in 2021 (36% staying in this category) – ‘campervan/motorhome’ the leading individual accommodation type within this category (at 18%).
- ‘Rented property or serviced apartment’ (26%) was the second most preferred accommodation type, ‘rented house/cottage’ the leading type within this category (22%).

Figure 26. Accommodation stayed in during Wales trip, Percentage.



A8a.What type of accommodation did you stay in on this trip in Wales in <month>?

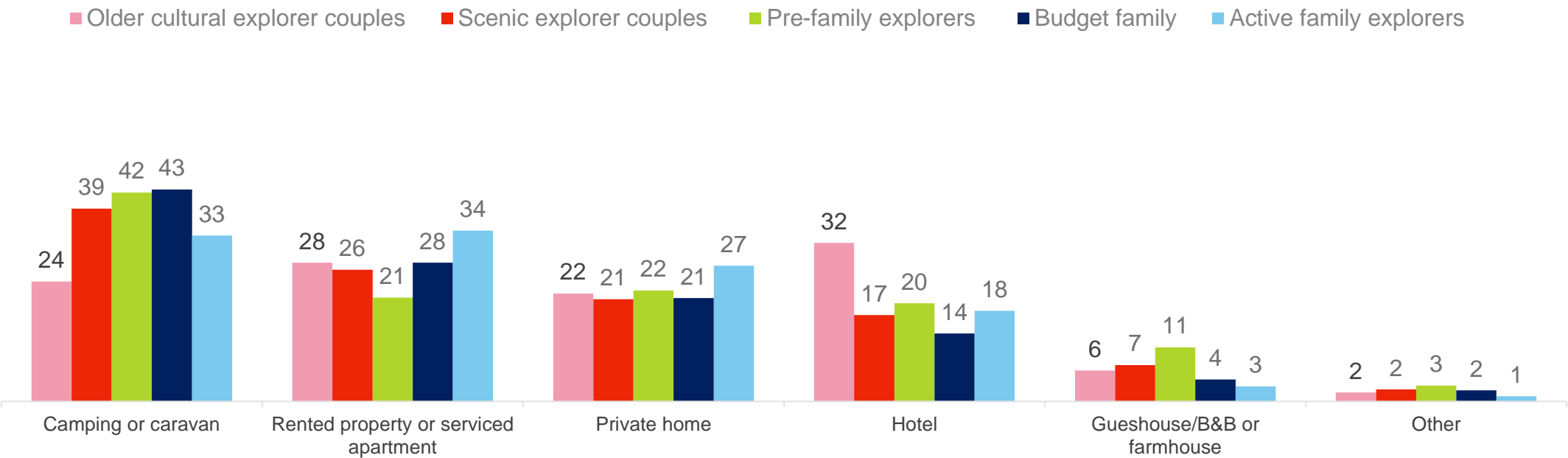
Base: All Wales trip-takers n=2,264

Note: Responses to this question and all subsequent 2021 trip-related questions are based on one randomly selected trip the respondent took in Wales in 2021

Accommodation stayed in during Wales trip by segment

- There is some variation in accommodation choice across Visit Wales' priority segments, 'older cultural explorer couples' more likely to have stayed in a hotel than any other accommodation type, and than any other segment. 'Active family explorers' were more likely to have stayed in a 'rented property or serviced apartment'. 'Budget families' were the most likely to have stayed in 'camping/caravan' accommodation, driven by 'static caravan – not owned by you'. Notably, although 'scenic explorer couples' and 'pre-family explorers' were also most likely to have stayed in 'camping/caravan' accommodation, this was driven by 'campervan/motorhome' trips.

Figure 27. Accommodation stayed in during Wales trip, Percentage, By Visit Wales segments



A8a.What type of accommodation did you stay in on this trip in Wales in <month>?
Base: Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99

Ease of booking accommodation in Wales

- For the majority (83%) of Wales trip-takers, booking accommodation for their 2021 trip was either very or fairly easy. However, this was less likely to be the case for those choosing 'camping or caravan' (71%), driven by trip-takers staying in a 'campervan/motorhome'.
- 1 in 10 (10%) trip-takers to Wales found booking accommodation 'difficult', rising to 18% of those opting for 'camping or caravan'.

Figure 28. Ease of booking accommodation, Percentage.

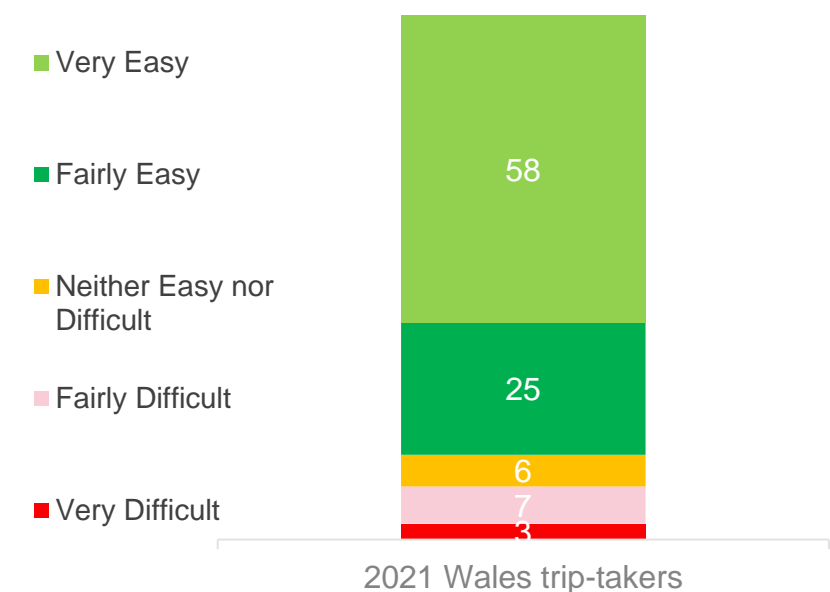
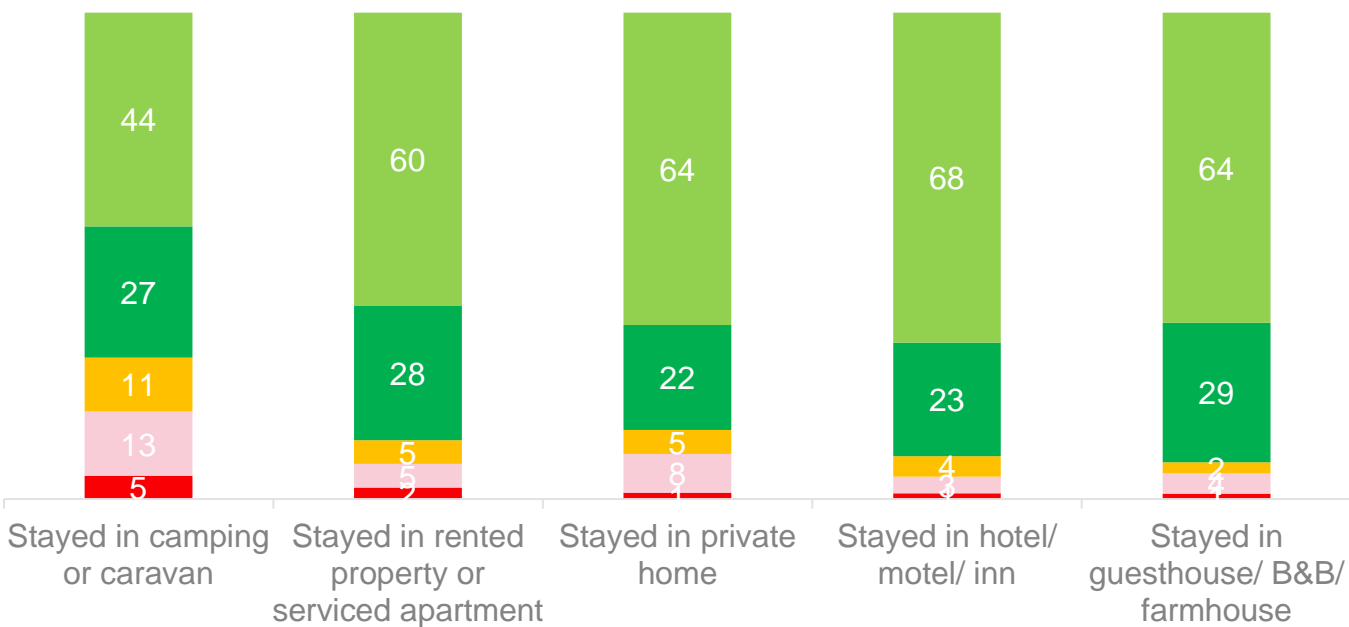


Figure 29. Ease of booking accommodation, Percentage, By Visit Wales segments



A9. Thinking back, how easy or difficult was it to find and book accommodation for your short break or holiday in Wales in <INSERT MONTH>?

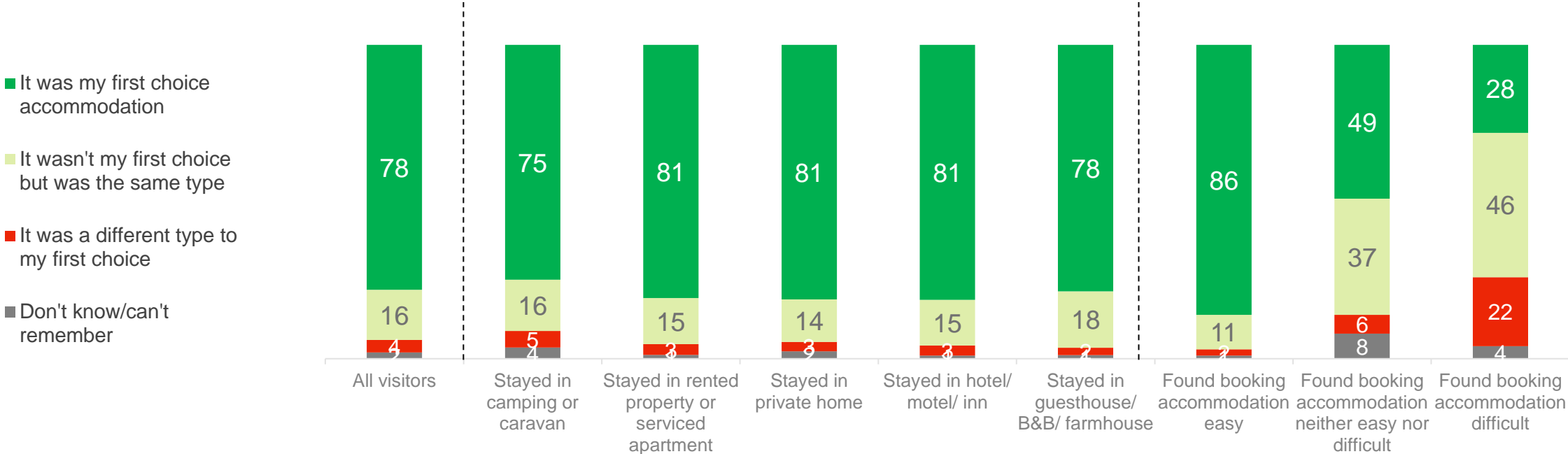
Base: All Wales trip-takers n=2,264; Stayed in camping or caravan n=687; Stayed in tented property or serviced apartment n=578; Stayed in private home n=366; Stayed in hotel/motel/inn n=497; Stayed in guesthouse/B&B/farmhouse n=171



Whether accommodation stayed in was first choice

- The majority of trip-takers (78%) were able to stay in their first-choice accommodation on their trip, relatively consistent across accommodation types, although lower amongst those staying in camping/caravan accommodation.
- There is a direct correlation between the ability to stay in first choice accommodation and finding booking accommodation easy.

Figure 30. Whether accommodation was first choice, Percentage, By accommodation choice and ease of booking



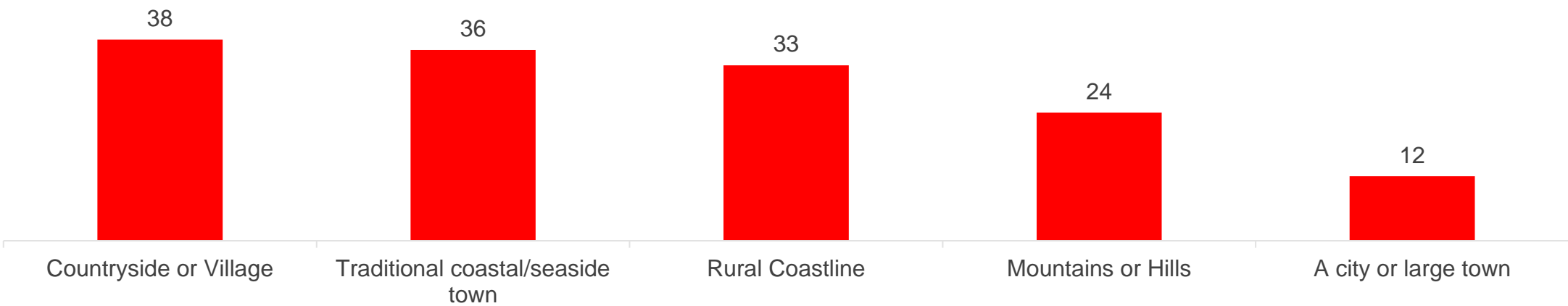
A10.Which of the following best describes the accommodation you ended up staying in?
Base: All Wales trip-takers n=2,264; Stayed in camping or caravan n=687; Stayed in tented property or serviced apartment n=578; Stayed in private home n=366; Stayed in hotel/motel/inn n=497; Stayed in guesthouse/B&B/farmhouse n=171; Found booking easy n=1,678; found booking neither easy or difficult n=128; found booking difficult n=194



Type of destination for Wales trip

- 'Countryside or village' (38%) was the leading destination type for Wales trips in 2021, followed by 'traditional coastal/seaside town' (36%) and 'rural coastline' (33%).

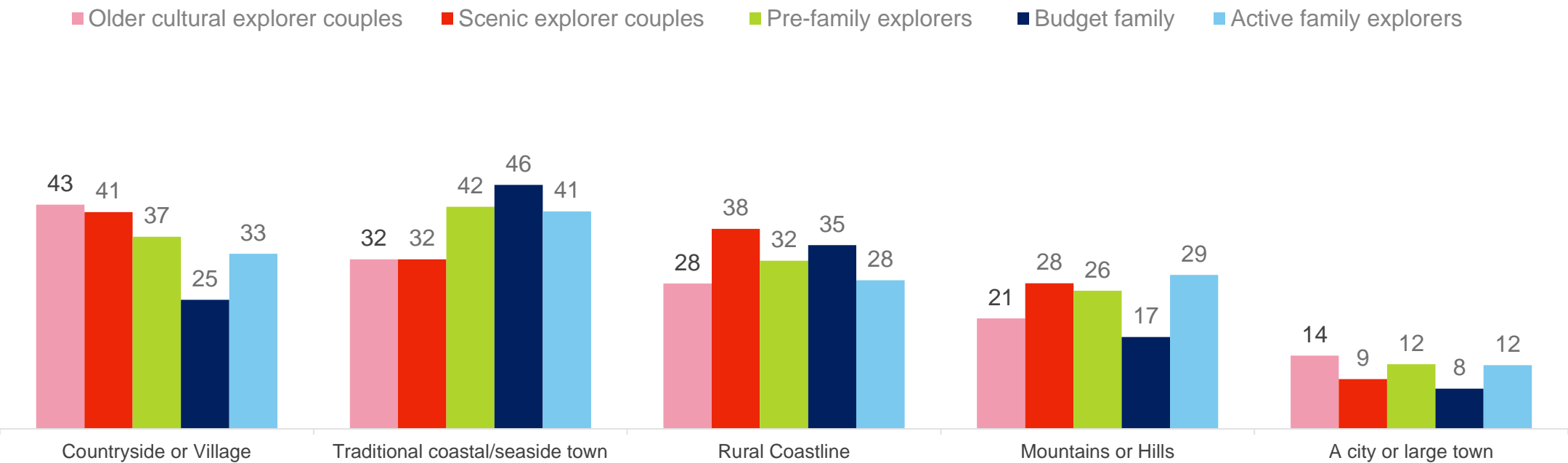
Figure 31. Type of destination for Wales trip, Percentage.



Type of destination for Wales trip by segment

- Destination type preference varies across Visit Wales' priority segments, 'older cultural explorer couples' and 'scenic explorer couples' indicating 'countryside or village' was their first choice. Amongst family and pre-family segments, 'traditional coastal/seaside town' was the number one choice.

Figure 32. Type of destination for Wales trip, Percentage, By Visit Wales segment



A11.Which of the following best describes the main type/s of destination you stayed in during your most recent trip in Wales in <INSERT MONTH>?

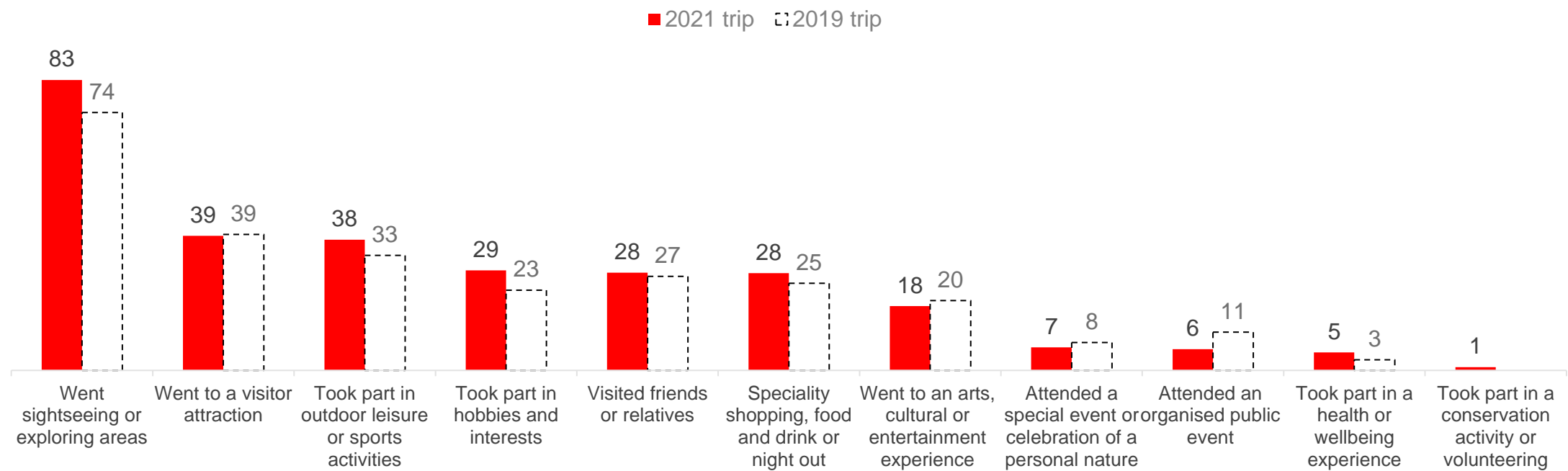
Base: Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99



Trip behaviour on Wales trip

- ‘Sightseeing or exploring areas’ was by the most popular activity for trip-takers on their 2021 trip, 83% having done this (significantly higher than the 74% did in 2019) followed by ‘went to a visitor attraction’ (at 39%, 5 percentage points higher than in 2019) and ‘took part in outdoor leisure or sports activities (at 38%). Nearly 3 in 10 (28%) visited their friends or relatives on their 2021 trip.
- Notably, only 6% attended an organised public event (compared to 11% in 2019), likely impacted by COVID-related restrictions and concerns.

Figure 33. Activities conducted on Wales trip, Percentage.

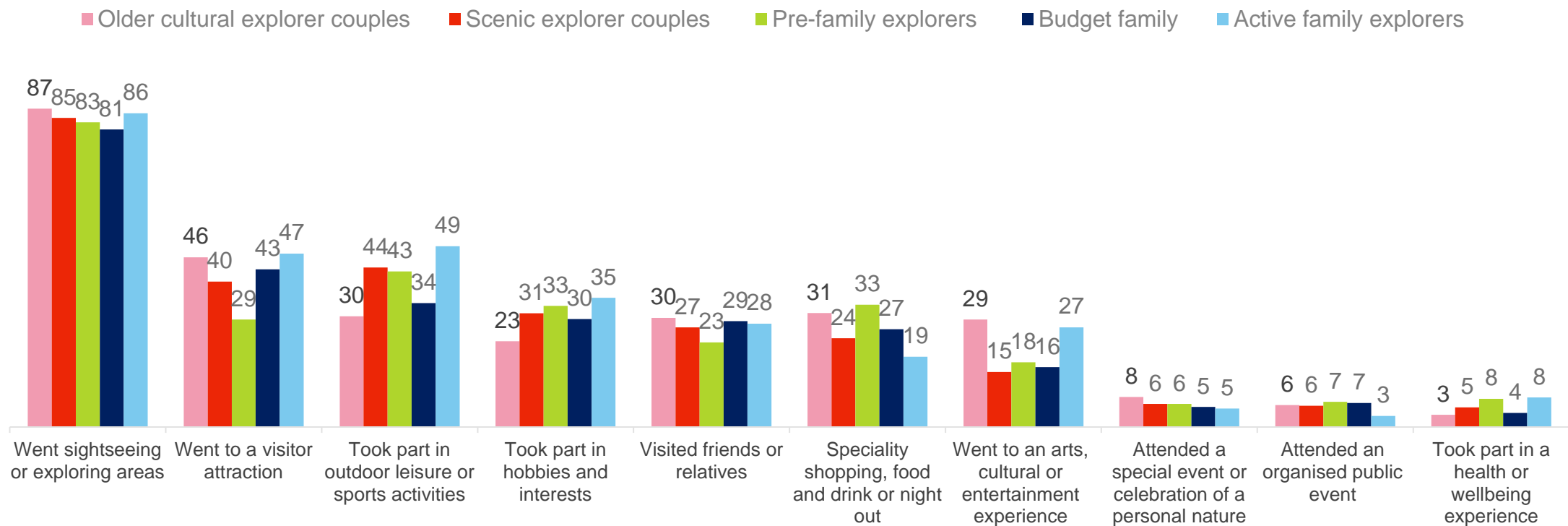


A12.Which, if any, of the following did you do on this trip in Wales in [MONTH]?
Base: All Wales trip-takers n=2,264

Trip behaviour on Wales trip by segment

- Across segments, ‘went sightseeing or exploring areas’ was the dominant activity. However, there was some variation in other activities. ‘Pre-family explorers’ were the least likely to have gone to a visitor attraction, whilst ‘active family explorers’ were the most likely to have taken part in outdoor leisure or sports activities.
- ‘Older cultural explorer couples’ showed the highest likelihood of visiting ‘arts, cultural or entertainment’ experiences.

Figure 34. Activities conducted on Wales trip, Percentage, By Visit Wales segment



A12.Which, if any, of the following did you do on this trip in Wales in [MONTH]?
Base: Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99



Rating of experience staying in Wales

- Two thirds (65%) of Wales trip-takers rated their experience of staying in Wales as ‘excellent’, a third rating it as ‘good’. The ability to stay in first choice accommodation is a strong driver of overall trip satisfaction, with only a minority of those that stayed in a different accommodation type to their first choice rating their trip as ‘excellent’.
- Compared to 2019, similar proportions provide a good/excellent rating, but there is a small drop in the proportion rating their visit as ‘excellent’

Figure 35. Rating of experience staying in Wales, Percentage.

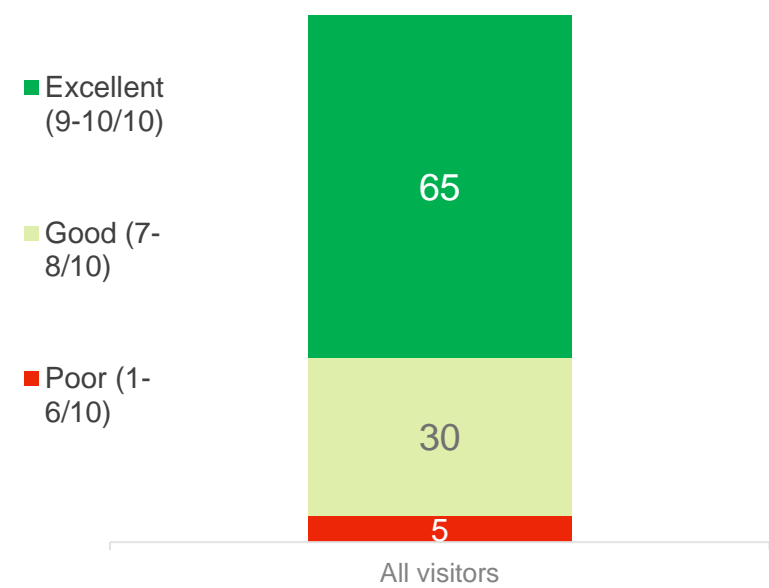
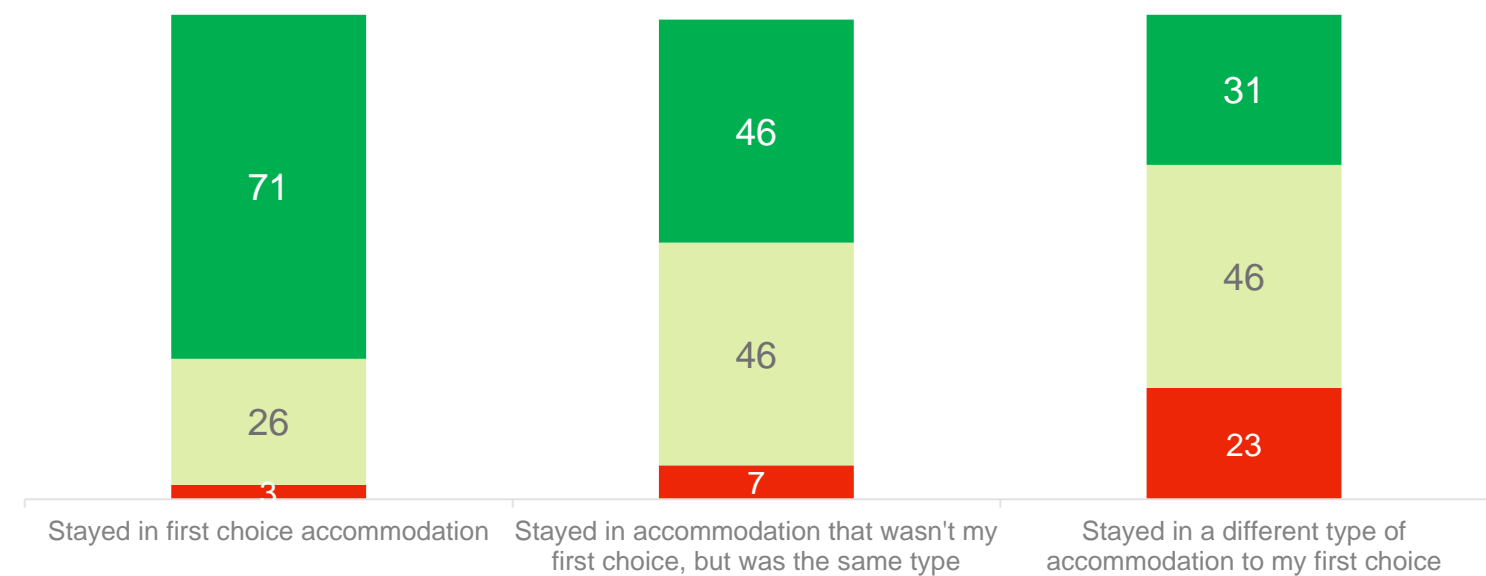


Figure 36. Rating of experience staying in Wales, Percentage, by ease of booking accommodation



A14.Now going back to your overnight trip in Wales in <INSERT MONTH>, how would you rate your experience overall?

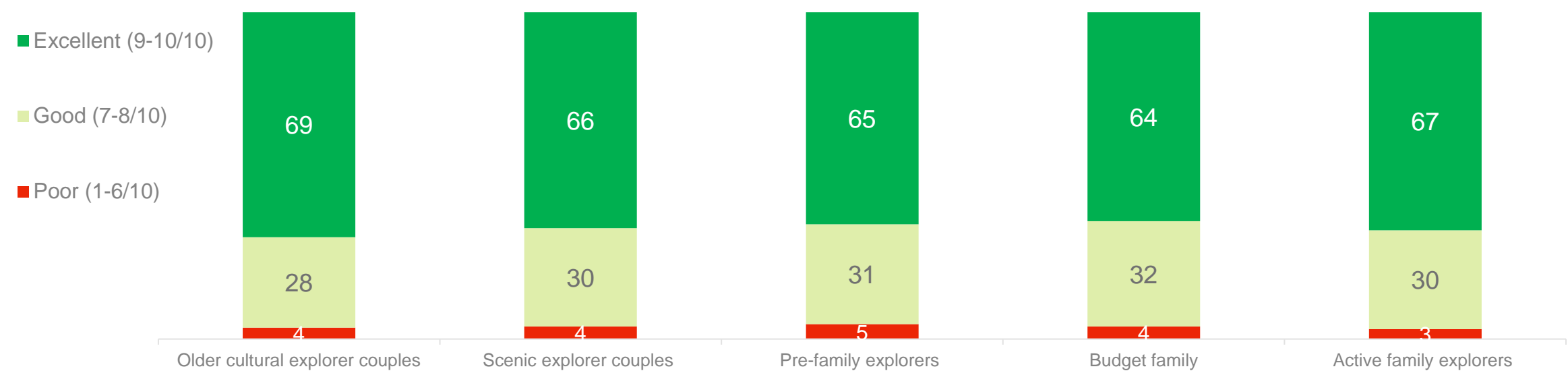
Base: All Wales trip-takers n=2,264



Rating of experience staying in Wales by segment

- Ratings of the visit experience were relatively consistent across each of Visit Wales' priority segments – around two thirds providing an 'excellent' score.

Figure 37. Rating of experience staying in Wales, Percentage, by Visit Wales segments



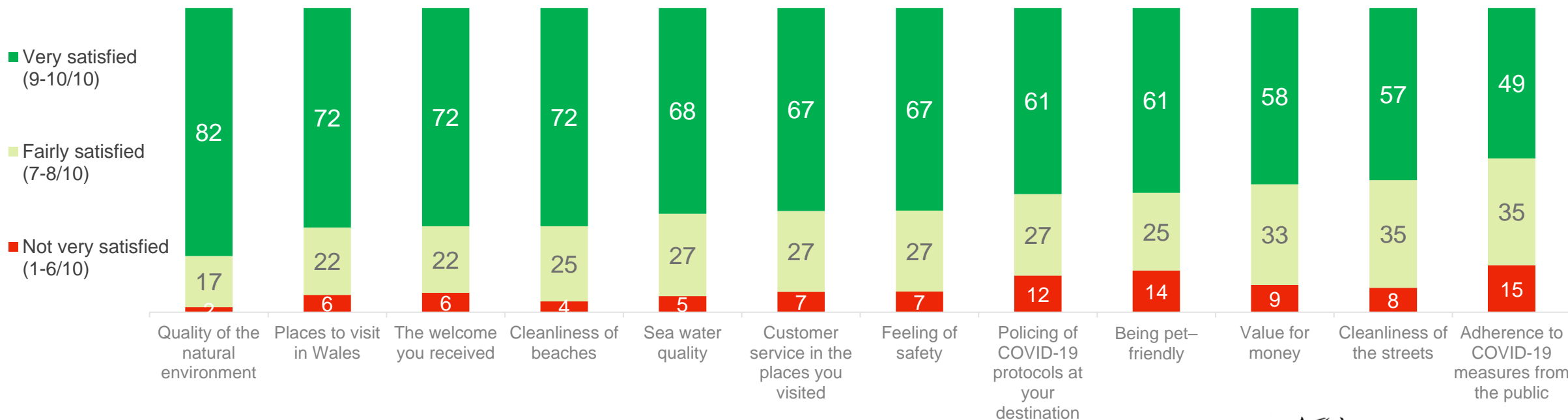
A14. Now going back to your overnight trip in Wales in <INSERT MONTH>, how would you rate your experience overall?
Base: Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99



Satisfaction with different elements of the Wales experience

- When assessing individual elements of the trip, Wales trip-takers were the most satisfied with the ‘quality of the natural environment’ in Wales (82% very satisfied), followed by ‘places to visit’ (72%), ‘the welcome received’ (72%), and ‘cleanliness of beaches’ (also 72%).
- Notably, 61% were ‘very satisfied’ with ‘policing of COVID-19 protocols’ - higher than the 49% satisfied with ‘adherence to COVID-19 measures from the public’.

Figure 38. Satisfaction with different elements of the Wales visit experience, Percentage, Top 12



A15.How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>?

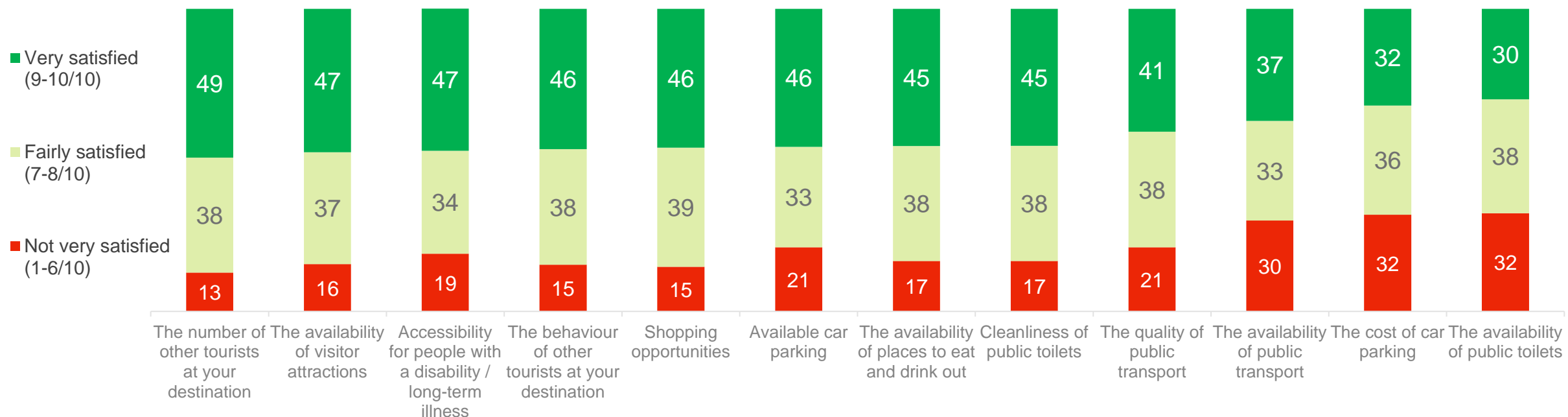
Base: All Wales trip-takers n=2,264. NA responses removed



Satisfaction with different elements of the Wales experience

- Of all the measures tested, ratings of the Wales visit experience were lowest for ‘the availability of public toilets’ (32% not very satisfied), ‘the cost of car parking’ (also 32%) and ‘the availability of public transport’ (30%).

Figure 39. Satisfaction with different elements of the Wales visit experience, Percentage, Bottom 12



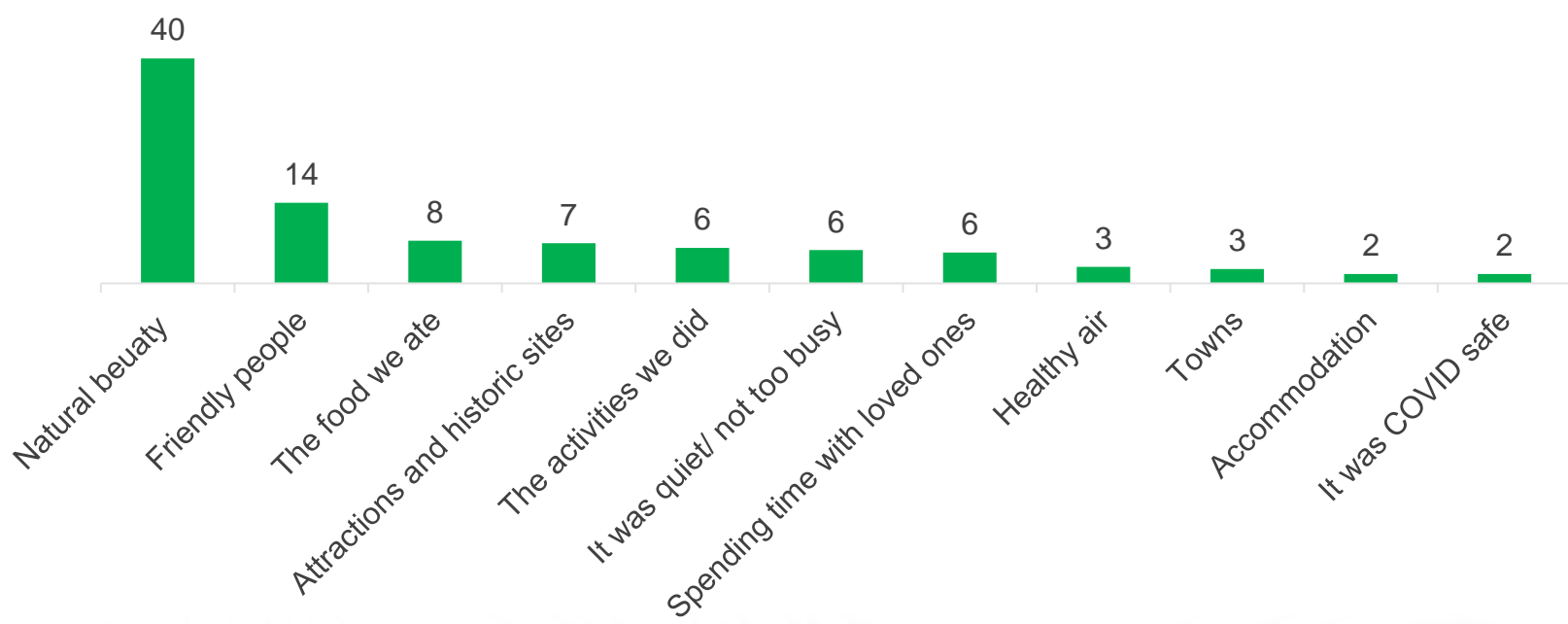
A15.How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>?
Base: All Wales trip-takers n=2,264. NA responses removed. Accessibility for people with a disability only asked of those stating they have a disability n=346



Most enjoyable element of Wales overnight trip

- Aligned with satisfaction ratings, Wales’ natural beauty received the highest number of positive mentions when enquirers were asked what they enjoyed most about their trip. ‘Friendly people’ was the next most mentioned, followed by ‘food’ and ‘attractions/historic sites’.
- A significant minority mentioned the fact that Wales was ‘not too busy’ and its ‘COVID safety’.

Figure 40. Top 10 most mentions, Percentage of all mentions.



“The wide open spaces in the Cambrian mountains with lack of other people.”

“The people - they are always most welcoming..”

“Well it is the land of plenty for a retired still fit chef, Welsh salt marsh sheep can 't be beaten, fish to die for ..”

“The amazing scenery and friendly atmosphere wherever you go. It is my go to Happy place..”

“Going to an area of coastline which was pretty much deserted and utterly beautiful..”

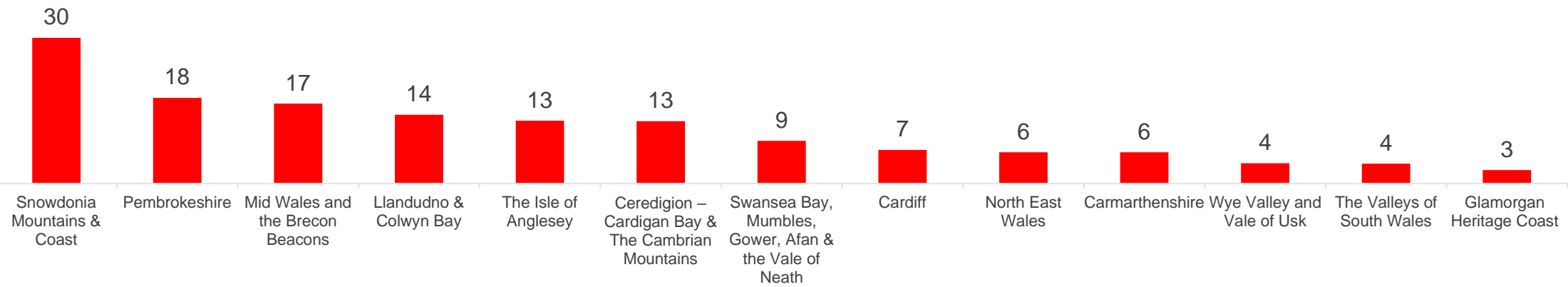
Trip characteristics by destination



Where stayed in Wales on Wales trip

- ‘Snowdonia Mountains and Coast’ was the part of Wales trip-takers were most likely to have stayed in on their 2021 trip, followed by Pembrokeshire, and ‘Mid Wales and the Brecon Beacons’. Trip-takers also stayed in a range of other destinations.

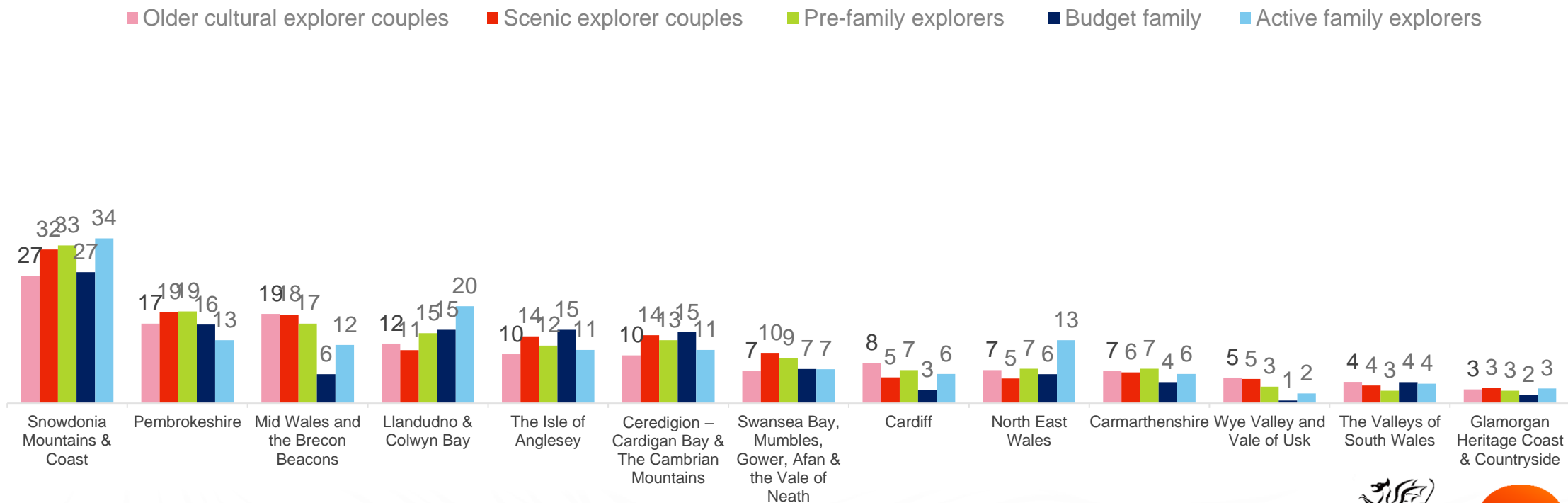
Figure 41. Destination visited when on Wales trip, Percentage.



Where stayed in Wales on Wales trip by segment

- ‘Snowdonia Mountains and Coast’ was the number one destination for each of Visit Wales’ priority segments, although there were some differences in destination preferences. ‘Budget families’ were the least likely to have stayed in ‘Mid Wales and the Brecon Beacons, while ‘active family explorers’ were the most likely to have stayed in ‘Llandudno & Colwyn Bay’ and North East Wales. However, it’s worth noting that where people stay is driven more by place of residence than segment profile.

Figure 42. Destination visited when on Wales trip, Percentage, by Visit Wales segments



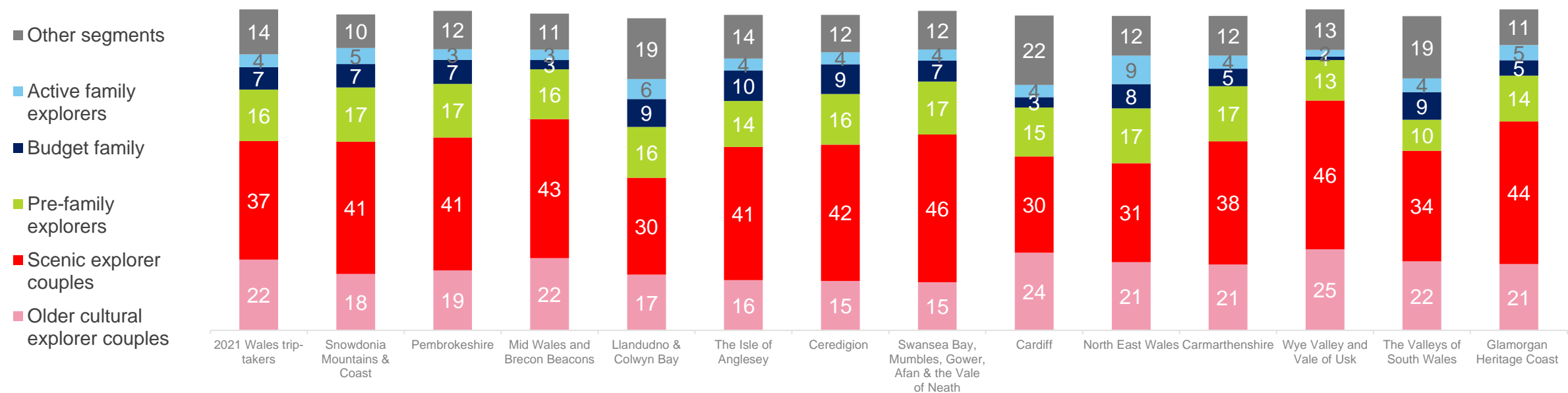
A7.Where in Wales did you stay overnight on this trip in [MONTH]?
Base: Older cultural explorers n=452; Scenic explorer couples n=877; Pre-family explorers n=350; Budget families n=183; Active family explorers n=99



Segment breakdown of Wales destination visitors

- The breakdown of Visit Wales segment broadly follows the breakdown by all enquirers. ‘Scenic explorer couples’ were the largest segment for all Wales destinations in 2021, ‘older cultural explorer couples’ and ‘pre-family explorers’ the next largest. There are limited significant differences across destination, with the exception of Cardiff which attracted a lower proportion of ‘scenic explorers couples’.

Figure 43. Visit Wales segment breakdown by Wales destination, Percentage.



Segment questions
Base: Snowdonia n=682; Pembrokeshire n=401; Mid Wales n=374; Llandudno and Colwyn Bay n=322; The Isle of Anglesey n=294; Ceredigion n=292; Swansea Bay.. n=200; Cardiff n=157; North East Wales n=146; Carmarthenshire n=146; Wye Valley n=95; The Valleys of South Wales n=93; Glamorgan Heritage Coast n=63



Region of residence of Wales destination visitors

- The region of origin of trip-takers to Wales destinations tends to reflect proximity to that destination. For example, nearly 1 in 4 visitors to 'Snowdonia Mountains and Coast' live in the North West of England, with a similar proportion of visitors to Ceredigion living in the West Midlands. Trip-takers to Wye Valley or Glamorgan Heritage Coast are more likely to live in the South East of England.

Table 5. Regional breakdown of trip-takers by Wales destination, Top 3 per destination underlined and highlighted in bold

	Snowdonia Mountains & Coast	Pembrokeshire	Mid Wales and the Brecon Beacons	Llandudno & Colwyn Bay	The Isle of Anglesey	Ceredigion – Cardigan Bay & The Cambrian Mountains	Swansea Bay, Mumbles, Gower, Afan & the Vale of Neath	Cardiff	North East Wales	Carmarthenshire	Wye Valley and Vale of Usk	The Valleys of South Wales	Glamorgan Heritage Coast & Countryside
North West	<u>23%</u>	10%	10%	<u>29%</u>	<u>39%</u>	<u>11%</u>	9%	10%	<u>29%</u>	<u>14%</u>	<u>10%</u>	9%	8%
West Midlands	<u>17%</u>	<u>17%</u>	<u>17%</u>	<u>20%</u>	<u>16%</u>	<u>23%</u>	<u>14%</u>	<u>11%</u>	<u>12%</u>	10%	<u>10%</u>	<u>14%</u>	<u>13%</u>
South East	9%	<u>18%</u>	<u>15%</u>	8%	6%	<u>14%</u>	<u>15%</u>	<u>22%</u>	<u>9%</u>	<u>17%</u>	<u>24%</u>	<u>15%</u>	<u>21%</u>
South West	7%	<u>15%</u>	<u>16%</u>	5%	5%	<u>11%</u>	<u>16%</u>	<u>15%</u>	8%	<u>14%</u>	<u>10%</u>	10%	<u>19%</u>
London	<u>10%</u>	9%	12%	<u>10%</u>	5%	7%	12%	<u>11%</u>	5%	11%	<u>11%</u>	<u>14%</u>	11%
East Midlands	9%	8%	7%	9%	<u>9%</u>	8%	5%	9%	6%	6%	6%	7%	6%
East of England	6%	7%	7%	4%	4%	8%	7%	6%	6%	6%	5%	8%	2%
Yorkshire and The Humber	9%	4%	4%	8%	8%	4%	7%	4%	7%	4%	5%	7%	6%
Wales	4%	8%	9%	3%	5%	10%	10%	5%	5%	9%	15%	8%	10%
Scotland	3%	2%	2%	3%	2%	1%	1%	3%	6%	6%	2%	3%	3%
North East	2%	1%	1%	1%	1%	2%	2%	1%	4%	1%	1%	2%	0%
Ireland/NI	1%	1%	1%	1%	1%	1%	2%	3%	4%	1%	1%	2%	0%

Demographics questions

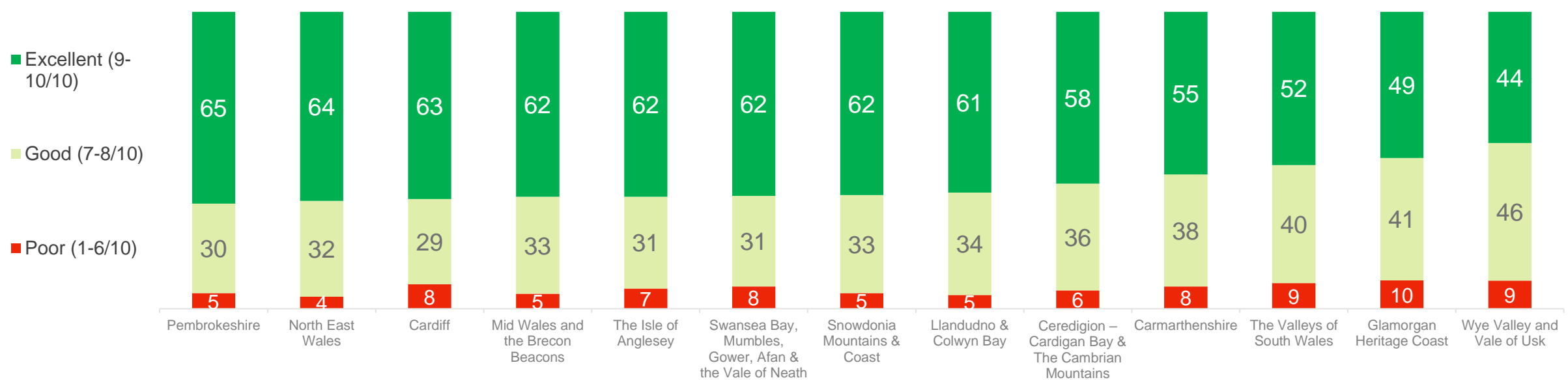
Base: Snowdonia n=682; Pembrokeshire n=401; Mid Wales n=374; Llandudno and Colwyn Bay n=322; The Isle of Anglesey n=294; Ceredigion n=292; Swansea Bay.. n=200; Cardiff n=157; North East Wales n=146; Carmarthenshire n=146; Wye Valley n=95; The Valleys of South Wales n=93; Glamorgan Heritage Coast n=63



Overall rating of experience by Wales destination

- Ratings of the Wales visit experience were highest for trip-takers who visited Pembrokeshire (65% rating it as excellent), North East Wales (64%) and Cardiff (63%). A range of other destinations also received high 'excellent' ratings.
- Although 'Wye Valley/Vale of Usk' and 'Glamorgan Heritage Coast' received the lowest ratings, the vast majority still rated these destinations as at least 'good'.

Figure 44. Rating of experience staying in Wales, Percentage, by Wales destinations visited



A14. Now going back to your overnight trip in Wales in <INSERT MONTH>, how would you rate your experience overall?

Base: Snowdonia n=682; Pembrokeshire n=401; Mid Wales n=374; Llandudno and Colwyn Bay n=322; The Isle of Anglesey n=294; Ceredigion n=292; Swansea Bay.. n=200; Cardiff n=157; North East Wales n=146; Carmarthenshire n=146; Wye Valley n=95; The Valleys of South Wales n=93; Glamorgan Heritage Coast n=63

Note: Ratings are based on the overall experience with destination ratings inferred by the destinations visited.



Satisfaction scores with elements of Wales trip by Wales destination

- Positively, all destinations within Wales achieved an average satisfaction score of at least 9 out of 10 for the natural environment. Across other measures, no destination was scored lower than 8 out of 10.

Table 6. Satisfaction with different elements of the Wales visit experience, Average out of 10, by Wales destination, Highest scores underlined, Ranked in order of overall ratings

	Snowdonia Mountains & Coast	Pembrokeshire	Mid Wales and the Brecon Beacons	Llandudno & Colwyn Bay	The Isle of Anglesey	Ceredigion – Cardigan Bay & The Cambrian Mountains	Swansea Bay, Mumbles, Gower, Afan & the Vale of Neath	Cardiff	North East Wales	Carmarthenshire	Wye Valley and Vale of Usk	The Valleys of South Wales	Glamorgan Heritage Coast & Countryside
Quality of the natural environment	9.3	<u>9.4</u>	9.2	9.2	9.2	9.3	9.2	9.1	9.2	9.1	9.1	9.1	9.1
Cleanliness of beaches	9.0	9.1	8.8	9.0	9.0	8.9	9.0	9.1	8.8	8.9	8.8	8.9	<u>9.2</u>
Places to visit in Wales	8.9	9.1	8.9	8.9	8.9	8.9	8.9	9.1	8.9	9.0	8.8	8.7	<u>9.2</u>
Sea water quality	<u>8.9</u>	<u>8.9</u>	NA	<u>8.9</u>	<u>8.9</u>	8.8	8.8	8.8	8.5	8.8	<i>Base sizes too small</i>	<i>Base sizes too small</i>	<i>Base sizes too small</i>
The welcome you received	8.8	<u>9.0</u>	8.9	8.7	8.7	8.8	8.9	<u>9.0</u>	<u>9.0</u>	8.9	8.6	8.8	8.8
Feeling of safety	8.8	8.8	8.8	8.7	8.7	8.8	8.8	8.6	8.8	8.5	8.9	8.6	<u>9.0</u>
Customer service	8.7	<u>8.8</u>	<u>8.8</u>	8.7	8.7	8.7	8.7	<u>8.8</u>	<u>8.8</u>	8.6	8.5	<u>8.8</u>	<u>8.8</u>
Value for money	<u>8.5</u>	<u>8.5</u>	<u>8.5</u>	8.4	8.4	8.4	<u>8.5</u>	<u>8.5</u>	8.5	8.3	8.3	8.4	<u>8.5</u>

A15.How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>? Base: Snowdonia n=682; Pembrokeshire n=401; Mid Wales n=374; Llandudno and Colwyn Bay n=322; The Isle of Anglesey n=294; Ceredigion n=292; Swansea Bay.. n=200; Cardiff n=157; North East Wales n=146; Carmarthenshire n=146; Wye Valley n=95; The Valleys of South Wales n=93; Glamorgan Heritage Coast n=63

Note: Ratings are based on the overall experience with destination ratings inferred by the destinations visited.

Satisfaction scores with elements of Wales trip by Wales destination

- There is limited variation in scores across other areas by destination. However, Cardiff stands out as the destination to receive the highest score for 'the availability of visitor attractions' at 8.4 out of 10.

Table 7. Satisfaction with different elements of the Wales visit experience, Average out of 10, by Wales destination, Highest scores underlined, Ranked in order of overall ratings

	Snowdonia Mountains & Coast	Pembrokeshire	Mid Wales and the Brecon Beacons	Llandudno & Colwyn Bay	The Isle of Anglesey	Ceredigion – Cardigan Bay & The Cambrian Mountains	Swansea Bay, Mumbles, Gower, Afan & the Vale of Neath	Cardiff	North East Wales	Carmarthenshire	Wye Valley and Vale of Usk	The Valleys of South Wales	Glamorgan Heritage Coast & Countryside
Cleanliness of the streets	<u>8.5</u>	<u>8.5</u>	<u>8.5</u>	<u>8.5</u>	<u>8.5</u>	8.4	8.2	8.2	8.4	8.3	8.0	7.9	8.2
Policing of COVID-19 protocols	8.5	8.4	<u>8.6</u>	8.5	8.5	8.5	<u>8.6</u>	8.2	8.3	8.1	8.3	8.2	8.5
Being pet-friendly	8.3	<u>8.6</u>	7.9	8.3	8.3	8.2	8.3	Base sizes too small	Base sizes too small	8.3	Base sizes too small	Base sizes too small	Base sizes too small
The number of other tourists	8.2	8.1	<u>8.3</u>	8.1	8.2	8.2	<u>8.3</u>	8.2	<u>8.3</u>	7.9	<u>8.3</u>	8.2	<u>8.3</u>
Adherence to COVID-19 measures from the public	8.1	8.1	8.1	8.1	8.1	8.1	<u>8.2</u>	8.0	<u>8.2</u>	8.0	7.9	8.1	8.1
Cleanliness of public toilets	8.0	<u>8.1</u>	7.9	7.9	7.9	7.9	7.7	8.0	<u>8.1</u>	7.7	7.8	7.7	Base sizes too small
The availability of visitor attractions	8.0	8.2	8.0	8.1	7.9	7.8	8.1	<u>8.4</u>	7.9	7.6	7.7	8.0	8.0
The behaviour of other tourists	8.0	8.0	8.0	7.9	8.1	8.1	8.2	8.1	8.1	7.8	7.8	7.8	7.9

A15.How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>? Base: Snowdonia n=682; Pembrokeshire n=401; Mid Wales n=374; Llandudno and Colwyn Bay n=322; The Isle of Anglesey n=294; Ceredigion n=292; Swansea Bay.. n=200; Cardiff n=157; North East Wales n=146; Carmarthenshire n=146; Wye Valley n=95; The Valleys of South Wales n=93; Glamorgan Heritage Coast n=63

Note: Ratings are based on the overall experience with destination ratings inferred by the destinations visited.



Satisfaction scores with elements of Wales trip by Wales destination

- Cardiff also received the highest scores for 'shopping opportunities', 'the availability of places to eat and drink' and the quality and availability of public transport.

Table 8. Satisfaction with different elements of the Wales visit experience, Average out of 10, by Wales destination, Highest scores underlined, Ranked in order of overall ratings

	Snowdonia Mountains & Coast	Pembrokeshire	Mid Wales and the Brecon Beacons	Llandudno & Colwyn Bay	The Isle of Anglesey	Ceredigion – Cardigan Bay & The Cambrian Mountains	Swansea Bay, Mumbles, Gower, Afan & the Vale of Neath	Cardiff	North East Wales	Carmarthenshire	Wye Valley and Vale of Usk	The Valleys of South Wales	Glamorgan Heritage Coast & Countryside
Accessibility for people with disability	7.8	7.6	<u>7.9</u>	7.8	7.8	7.8	Base sizes too small	Base sizes too small	Base sizes too small	Base sizes too small	Base sizes too small	Base sizes too small	Base sizes too small
Shopping opportunities	7.9	8.2	8.0	8.4	8.0	7.9	8.0	<u>8.8</u>	8.2	7.9	7.8	8.0	8.2
The availability of places to eat and drink	7.8	8.0	8.0	8.3	7.9	7.9	8.1	<u>8.6</u>	8.0	7.8	7.9	7.9	7.9
Available car parking	7.7	7.7	7.5	7.5	7.5	7.4	7.4	7.6	7.7	7.2	7.0	7.4	<u>7.8</u>
The quality of public transport	7.5	7.7	7.0	<u>7.9</u>	6.9	7.0	7.8	<u>7.9</u>	Base sizes too small	7.3	6.3	6.8	<u>7.9</u>
The cost of car parking	<u>7.2</u>	7.0	6.9	7.1	6.8	6.9	6.9	7.0	7.1	6.4	6.7	6.9	6.8
The availability of public toilets	<u>7.2</u>	7.1	6.9	7.1	6.6	7.1	7.0	6.9	6.6	6.5	6.5	6.9	<u>7.2</u>
The availability of public transport	7.1	7.3	6.3	7.6	6.5	6.5	7.5	<u>7.9</u>	Base sizes too small	6.4	5.5	7.0	7.8

A15.How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>? Base: Snowdonia n=682; Pembrokeshire n=401; Mid Wales n=374; Llandudno and Colwyn Bay n=322; The Isle of Anglesey n=294; Ceredigion n=292; Swansea Bay.. n=200; Cardiff n=157; North East Wales n=146; Carmarthenshire n=146; Wye Valley n=95; The Valleys of South Wales n=93; Glamorgan Heritage Coast n=63

Note: Ratings are based on the overall experience with destination ratings inferred by the destinations visited.



Reasons for not taking trips to Wales in 2021



Destination consideration amongst non-Wales visitors

- Of the enquirers that did not visit Wales in 2021, over half (53%) were considering going there. 1 in 4 (24%) were considering Wales but decided to visit somewhere else in the British Isles instead. A further 3 in 10 (28%) were considering Wales but didn't go anywhere at all. The West Country was the number one alternative destination (at 31%) with Scotland (25%) and Yorkshire (24%) close behind.
- It's worth noting that in 2021, the proportion that did not go anywhere was double that before the pandemic (in 2019)

Figure 45. Wales visiting intentions by non-Wales visitors, Percentage, non-Wales visitors

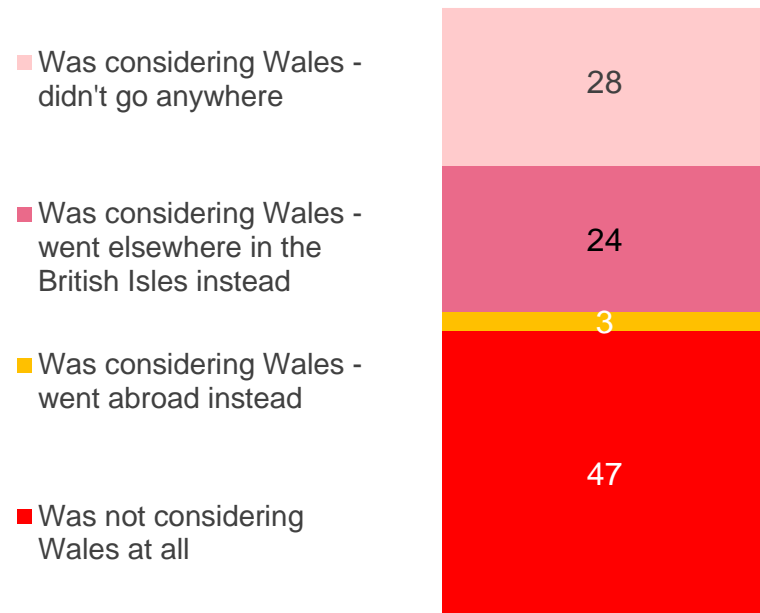
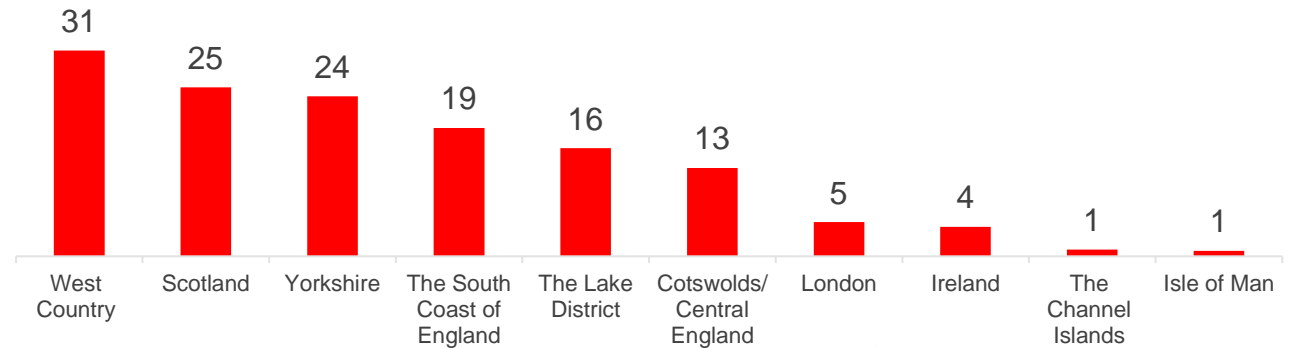


Figure 46. Destination of those that went elsewhere in the British Isles, Percentage, non-Wales visitors



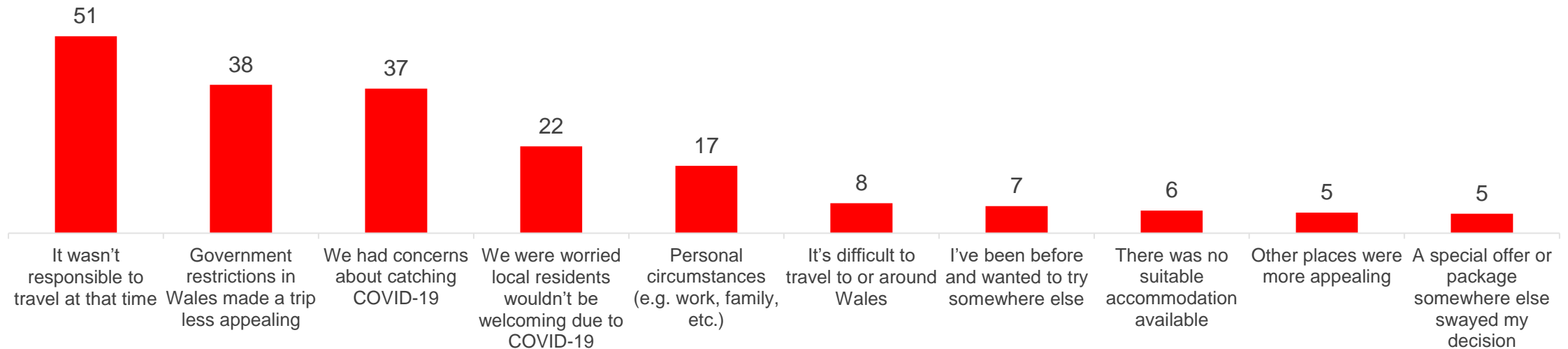
B1. You indicated that you did not go to Wales during 2021. Were you considering a trip in Wales in 2021 at any stage?

Base: All non-Wales visitors n=2,258; All that went elsewhere in British Isles n=870

Reasons for not visiting Wales in 2021

- Over half (51%) of enquirers that didn't visit Wales for a trip in 2021 stated it was because 'it wasn't responsible to travel at that time', with 2 in 5 (38%) stating 'government restrictions in Wales made a trip less appealing', and a similar proportion (37%) that they 'had concerns about catching COVID-19'.
- More than 1 in 5 (22%) of non-visitors to Wales were worried about the welcome they would receive due to COVID.

Figure 47. Reason for not visiting Wales for overnight trip in 2021, Percentage, non-Wales visitors



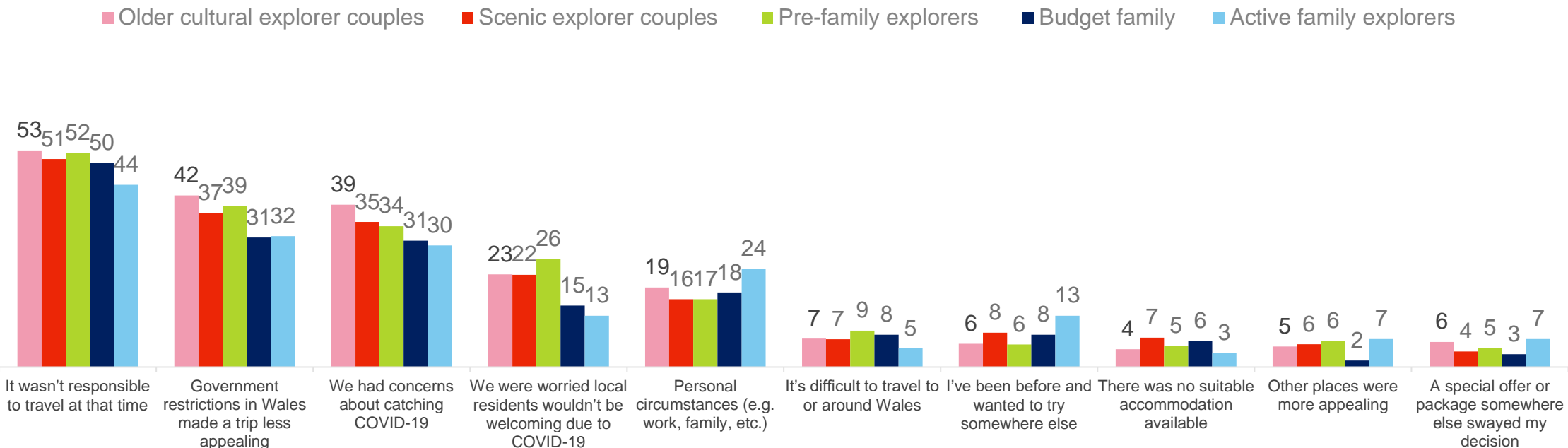
B4.What are the reasons that you didn't visit Wales for a holiday or short break in 2021?

Base: All non-Wales visitors n=2,258

Reasons for not visiting Wales in 2021 by segment

- ‘It wasn’t responsible to travel at that time’, ‘concerns around catching COVID’ and ‘government restrictions’ were most likely to be reasons for not visiting amongst ‘older cultural explorer couples’ – the segment least likely to have visited Wales in 2021. Family segments were less likely to cite these reasons, although they were prevalent for all.

Figure 48. Reason for not visiting Wales for overnight trip in 2021, Percentage, non-Wales visitors, by Visit Wales segment



B4.What are the reasons that you didn't visit Wales for a holiday or short break in 2021?
Base: Older cultural explorers n=621; Scenic explorer couples n=740; Pre-family explorers n=327; Budget families n=127; Active family explorers n=88



General trip plans for 2022



Number of UK overnight trips likely to take in next 12 months

- Visit Wales enquirers anticipate 'net more' UK overnight trips in the next 12 months compared to the previous 12 months (62% expecting to take more and 5% fewer) – consistent across all segments. Family segments are slightly less likely than other segments to take 'more trips' but this will in part be driven by their 2021 trip frequency not being as impacted by the pandemic.
- Although enquirers also anticipate taking 'net more' overseas trips in the next 12 months, this is only the case for 1 in 4, and the majority still 'don't know'. 'Active family explorers' and 'pre-family explorers' are the segments most likely to be planning 'more' overseas trips, and the least likely to state they 'don't know'.

Figure 49. Number of UK and overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, All Enquirers

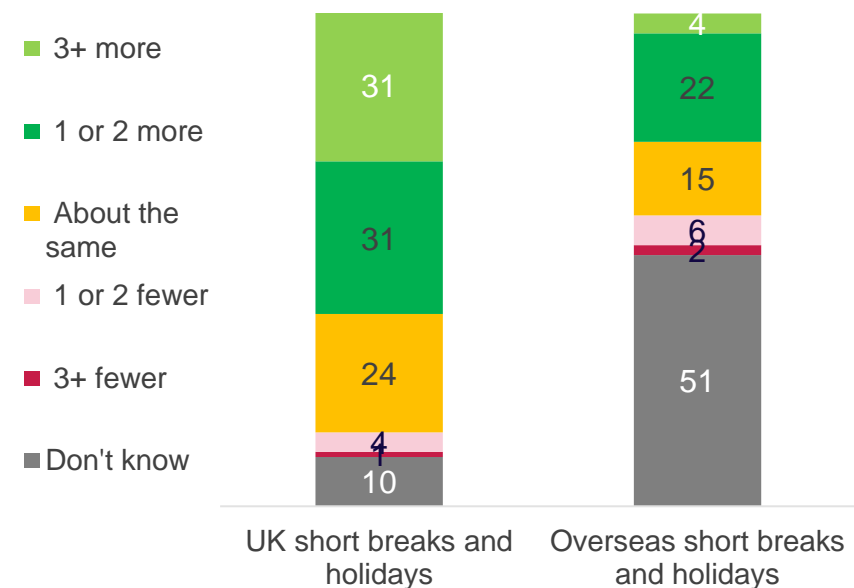
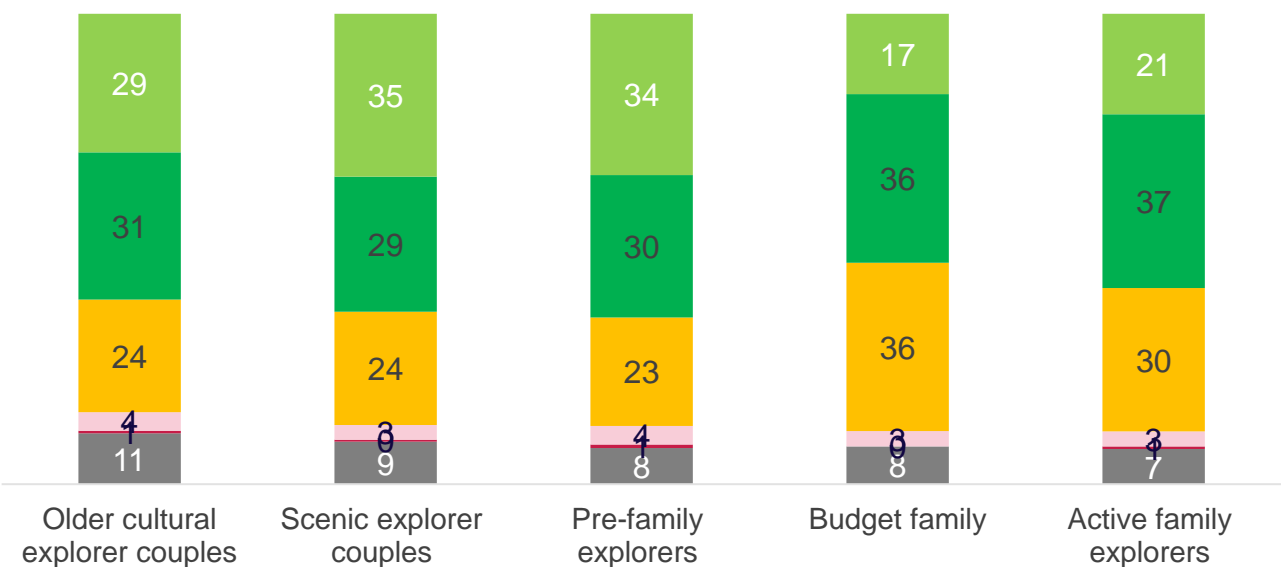


Figure 50. Number of UK overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, All Enquirers by Visit Wales segments



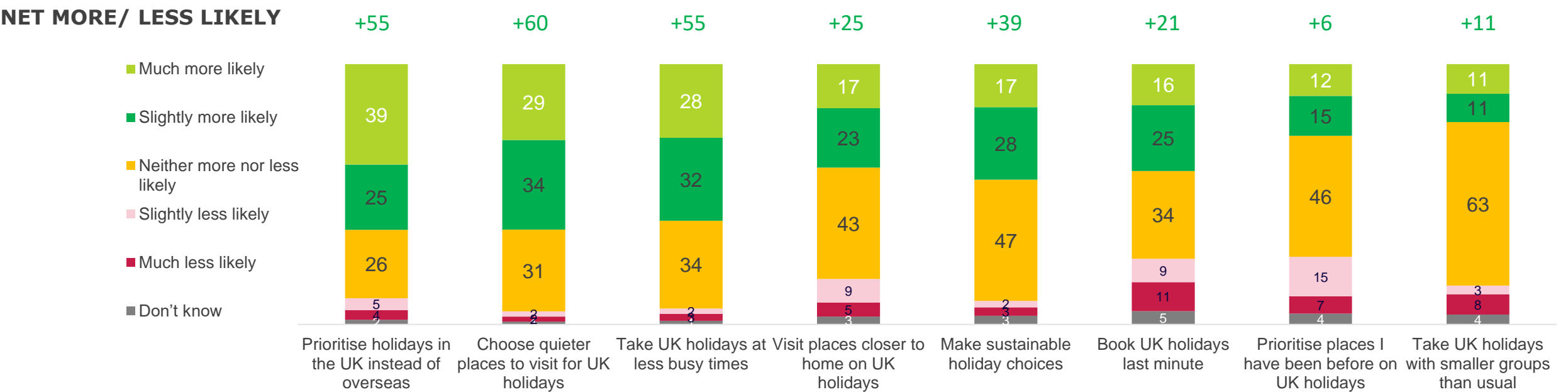
F1a.Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took in the last 12 months?
Base: All Visit Wales enquirers n=4,522; Older cultural explorers n=1,073; Scenic explorer couples n=1,617; Pre-family explorers n=677; Budget families n=310; Active family explorers n=187.



General anticipated behaviour change in 2022

- Compared to before the pandemic, Visit Wales enquirers indicate they are the most likely to ‘prioritise UK holidays instead of overseas holidays’, followed by ‘choose quieter places to visit for UK holidays’ and ‘take UK holidays at less busy times’.

Figure 51. Anticipated behaviour change in 2022, Percentage and Net more/less likely, All Enquirers

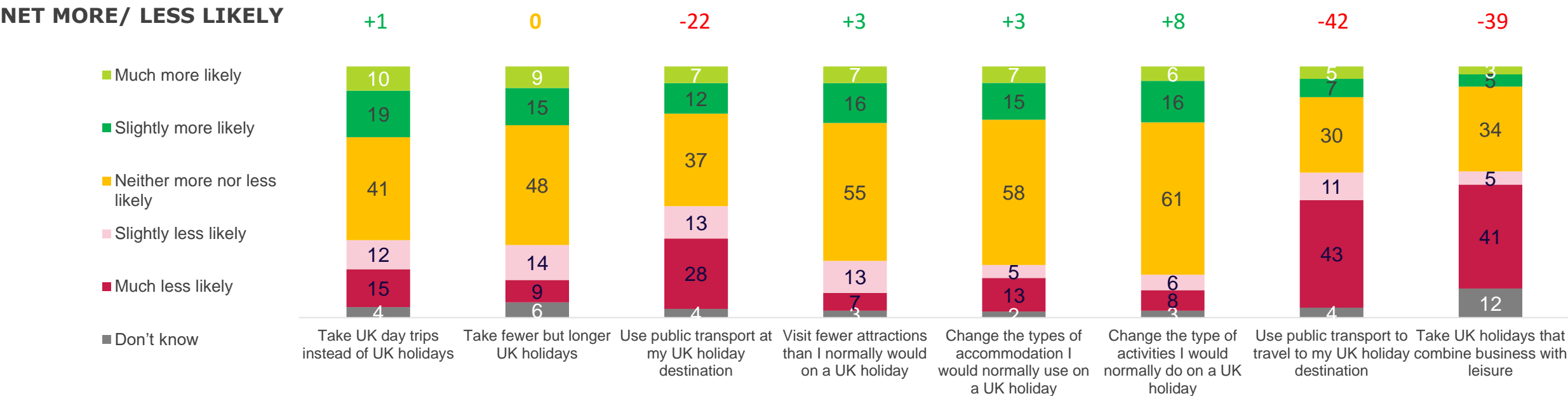


F1b. How much more or less likely are you to do the following in 2022, compared to before the pandemic?
Base: All Visit Wales enquirers n=4,522

General anticipated behaviour change in 2022

- Also compared to pre-pandemic, Visit Wales enquirers consider themselves less likely to ‘take UK holidays that combine business with leisure’, to ‘use public transport to travel to their UK holiday destination’, and to ‘use public transport at their UK holiday destination’.

Figure 52. Anticipated behaviour change in 2022, Percentage and Net more/less likely, All Enquirers



F1b. How much more or less likely are you to do the following in 2022, compared to before the pandemic?
Base: All Visit Wales enquirers n=4,522

General anticipated behaviour change in 2022 by segments

- There are some notable behaviour change differences by Visit Wales segments. All segments show a strong desire to 'choose quieter, less crowded places to visit for UK holidays'. However, non-family segments are significantly more likely to take UK holidays at less busy times. Perhaps notably, 'Active Family Explorers' are the least likely to prioritise holidays in the UK instead of travelling internationally.

Table 8. Anticipated behaviour change in 2022, Net more/less likely, Visit Wales segments

	Older cultural explorer couples	Scenic explorer couples	Pre-family explorers	Budget family	Active family explorers
Choose quieter, less crowded places to visit for UK holidays	+59	+64	+62	+51	+60
Take UK holidays at less busy times	+58	+61	+60	+33	+28
Prioritise holidays in the UK instead of travelling internationally	+54	+58	+54	+60	+47
Make sustainable/environmentally friendly UK holiday choices	+42	+40	+43	+37	+40
Visit friends or relatives on my UK holidays	+30	+23	+31	+43	+27
Visit places closer to home on UK holidays	+24	+22	+31	+34	+17
Book UK holidays last minute	+21	+19	+31	+17	+11
Take UK holidays with smaller groups than usual	+12	+11	+13	+10	+5

F1b. How much more or less likely are you to do the following in 2022, compared to before the pandemic?

Base:

General anticipated behaviour change in 2022 by segments

- There are minimal differences by segment across other measures. However, 'Active Family Explorers' are the least likely to prioritise places they have been to before on UK holidays.

Table 9. Anticipated behaviour change in 2022, Net more/less likely, Visit Wales segments

	Older cultural explorer couples	Scenic explorer couples	Pre-family explorers	Budget family	Active family explorers
Change the types of accommodation I would normally use on a UK holiday	+5	-2	+10	+5	+10
Change the type of activities I would normally do on a UK holiday	+5	+5	+15	+11	+19
Take UK day trips instead of UK holidays	+4	-5	+9	+12	+4
Prioritise places I have been before on UK holidays	+2	+6	+4	+11	-5
Visit fewer attractions than I normally would on a UK holiday	-1	5	-1	+4	-4
Take fewer but longer UK holidays	-4	0	+1	7+	+7
Use public transport at my UK holiday destination	-16	-26	-21	-31	-32
Use public transport to travel to my UK holiday destination	-36	-47	-41	-42	-43
Take UK holidays that combine business with leisure	-42	-43	-27	-27	-29

F1b. How much more or less likely are you to do the following in 2022, compared to before the pandemic?

Base:

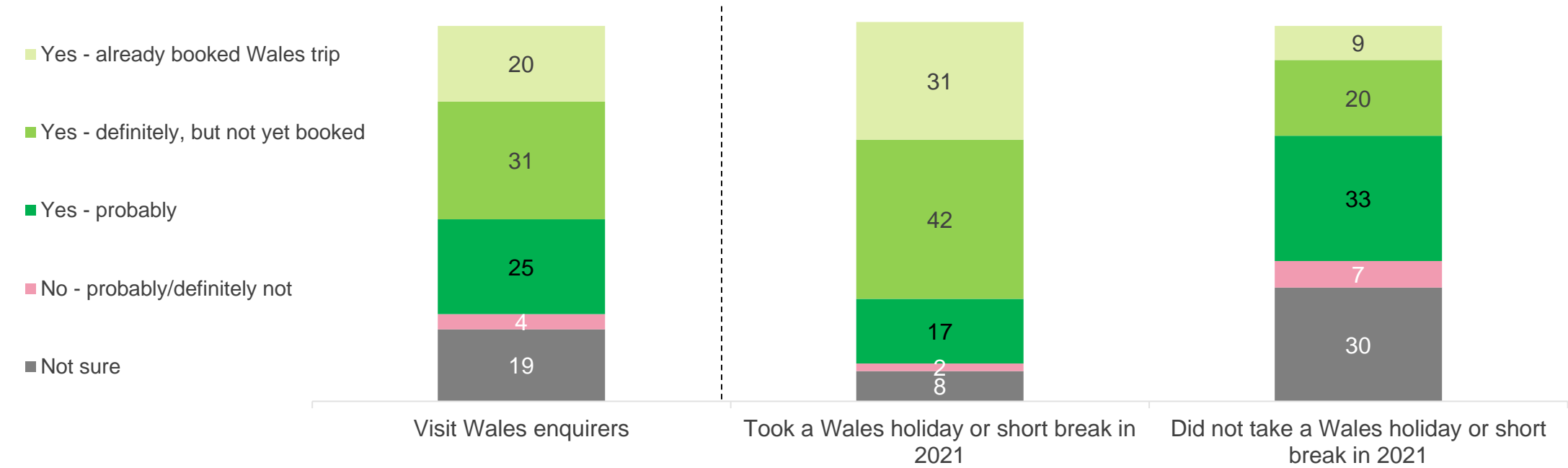
**Intention to take a
trip in Wales in
2022**



Wales overnight trip intention in 2022

- 20% of Visit Wales enquirers have *already* booked a Wales trip in 2022, with 31% ‘definitely going’ but without having yet booked. A further 25% state they will probably go, meaning 76% are open to visiting. 19% are unsure and only 4% stated they will probably/definitely not go to Wales.
- 2021 trip-takers are more likely to be intending to be taking a trip in Wales in 2022, with non-2021 trip-takers more likely to be unsure.

Figure 53. Wales visit intention in 2022, Percentage, All enquirers



F2.Are you intending to take a holiday or short break in Wales in 2022?

Base: All Visit Wales enquirers n=4,522; Took Wales holiday in 2021 n=2,264; Did not take Wales holiday in 2021 n=2,114



Wales overnight trip intention in 2022 by region of residence

- Similar to trips taken in 2021, Visit Wales enquirers living in Wales, the West Midlands and the North West of England are the most likely to be intending to take a Wales trip in 2022.
- The make-up of 2022 Wales intenders by region is almost identical to 2021 trip-takers and all enquirers.

Figure 54. Wales visit intention in 2022, Percentage, By region of residence

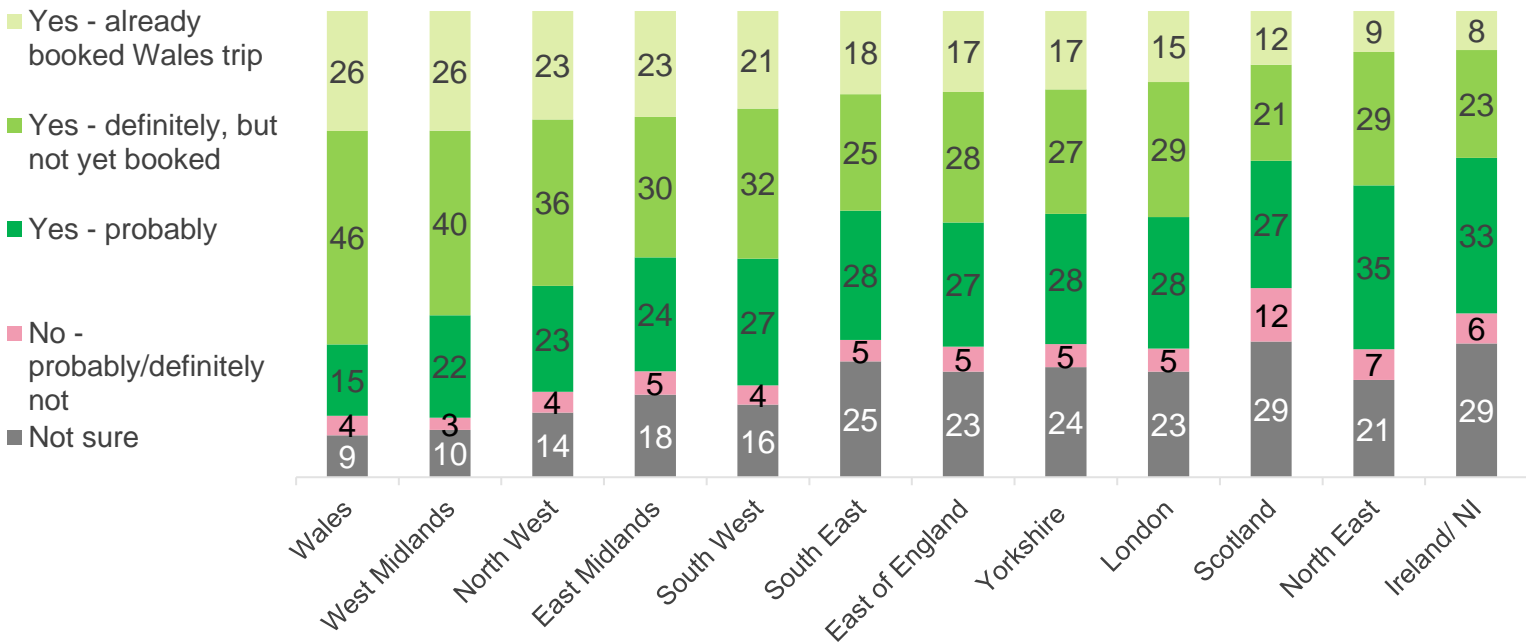
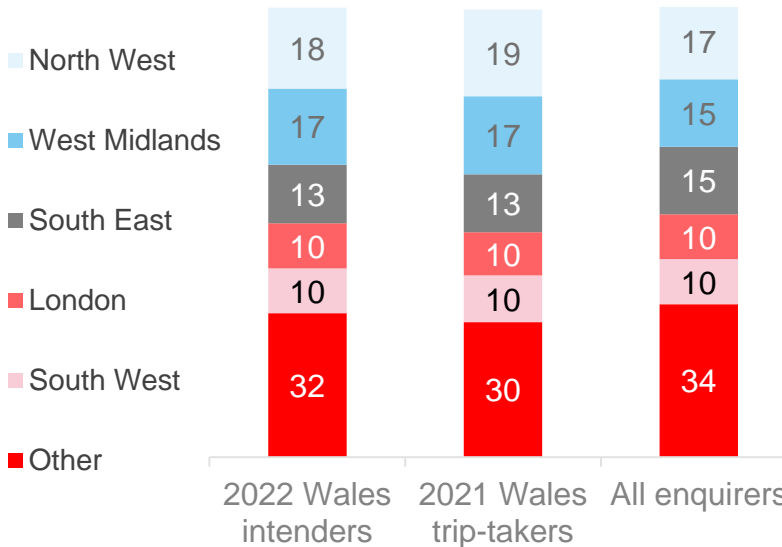


Figure 55. Breakdown of Wales 2022 intenders by region of residence, Percentage.



F2.Are you intending to take a holiday or short break in Wales in 2022?
Base: Wales n=144; West Midlands n=627; North West n=735; South West n=416; East Midlands n=339; London n=446; East of England n=300; South East n=628; Yorkshire and The Humber n=322; North East n=91; Scotland n=165; Northern Ireland/Ireland n=95. 2021 trip-takers n=2,264; All enquirers n=4,522; All Visit Wales enquirers n=4,522; 2022 intenders n=3,154; 2021 trip-takers n=2 264



Wales overnight trip intention in 2022 by segment

- Budget families are the Visit Wales priority segment the most likely to have *already booked* their Wales trip for 2022, with other segments relatively equally likely to have done so or to be intending to do so.
- Older cultural explorer couples are the segment most likely to be ‘unsure’ about whether they will take a trip to Wales in 2022, and are the only segment to index below their fallout amongst all enquirers. That said, they currently index higher among 2022 trip intenders than amongst 2021 trip-takers.

Figure 56. Wales visit intention in 2022, Percentage, By Visit Wales segments

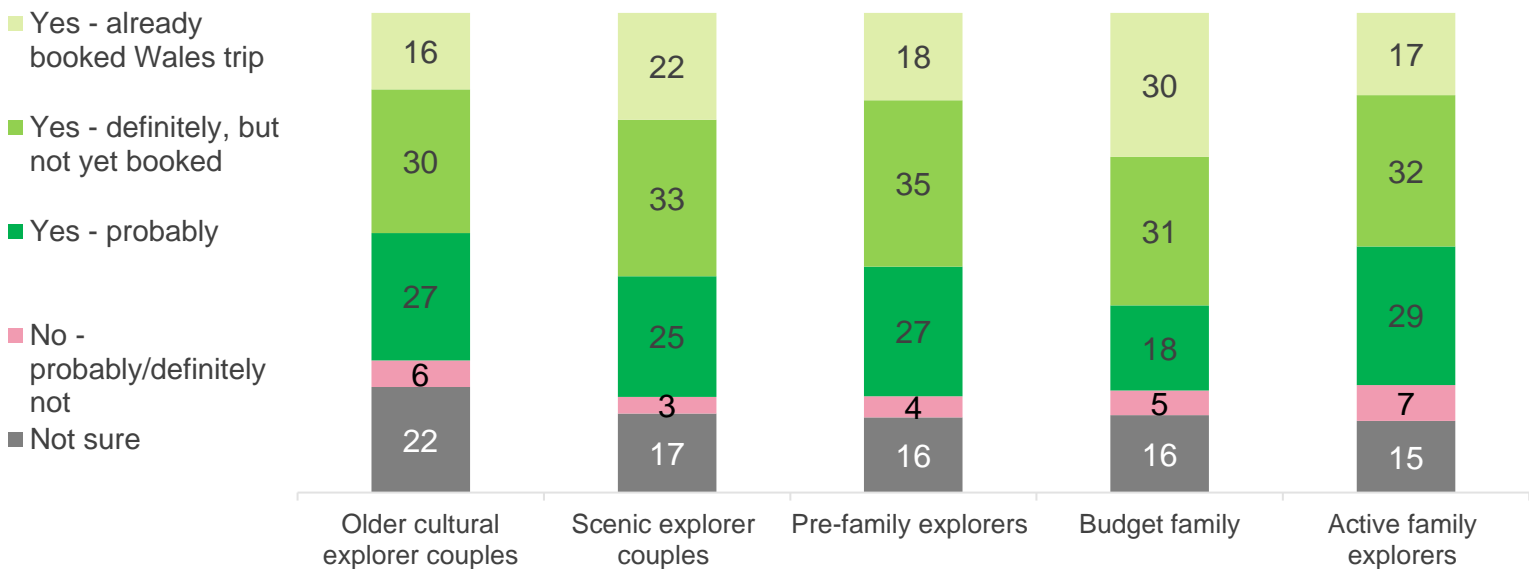
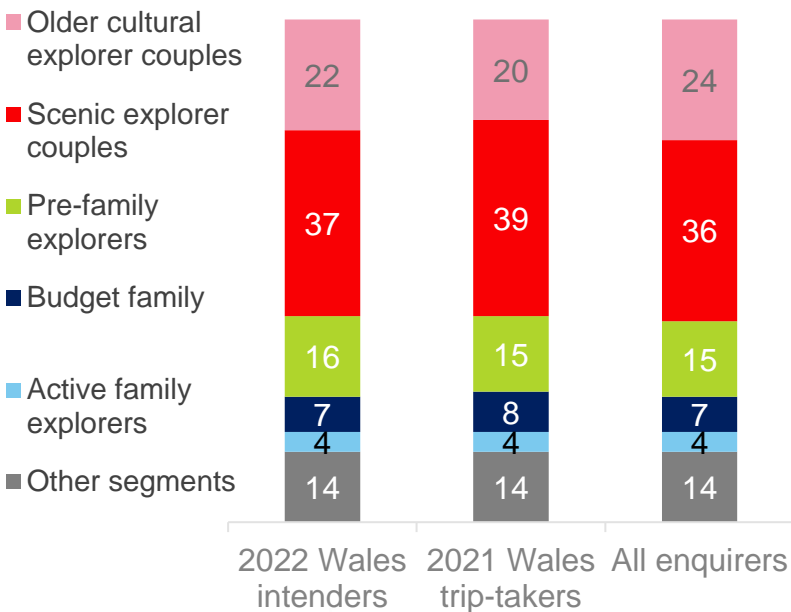


Figure 57. Breakdown of Wales 2022 intenders by Visit Wales segment, Percentage.



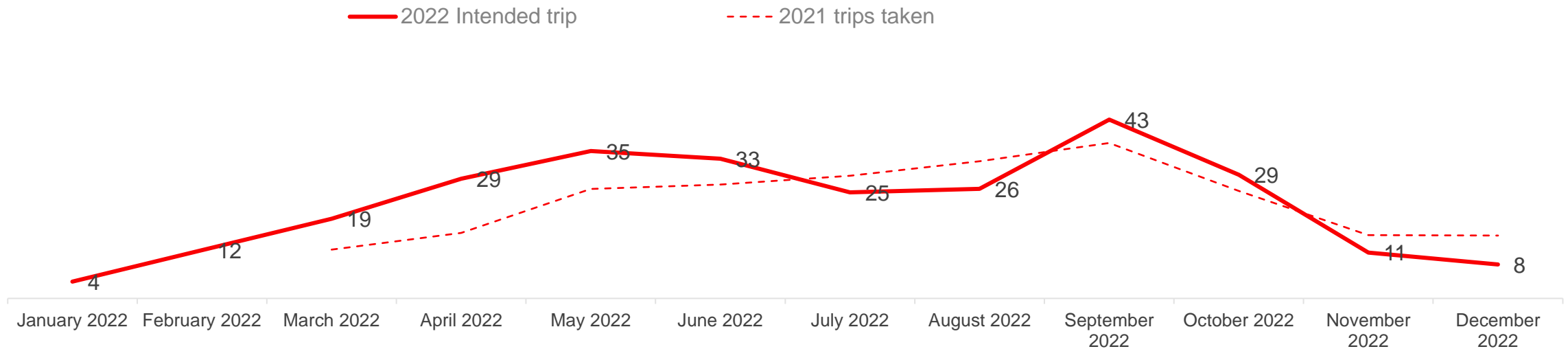
F2.Are you intending to take a holiday or short break in Wales in 2022?
Base: Older cultural explorers n=1,073; Scenic explorer couples n=1,617; Pre-family explorers n=677; Budget families n=310; Active family explorers n=187; All enquirers n=4,522; All Visit Wales enquirers n=4,522; 2022 intenders n=3,154; 2021 trip-takers n=2 264



Month of intended Wales trip in 2022 and desire to travel off-peak

- Similar to 2021, Wales 2022 enquirers are most likely to take their trip in September 2022, followed by May and June. Compared to 2021, there appears to be a higher spread across months earlier in the year, perhaps linked to concerns around the pandemic being lower in 2022.
- As with 'trips taken', the bias towards off-peak time periods is driven by the older age amongst enquirers.

Figure 58. Month of intended Wales trip in 2022, Percentage, Wales intenders



F3a. When are you planning to take a holiday or short break in Wales in 2022?
Base: All 2022 Wales trip-intenders n=3,154;

Consideration of off-peak travel to Wales

- Two thirds of Wales 2022 trip-intenders are *not* considering an off-peak trip to Wales in 2022 (defined as between January and March or October to December)
- Of those that don't intend to take an off-peak trip, nearly two thirds (65%) state they would be likely to do so at some point in the future.

Figure 59. Considering a trip to Wales in Jan-Mar or Oct-Dec 2022, Percentage, All intenders

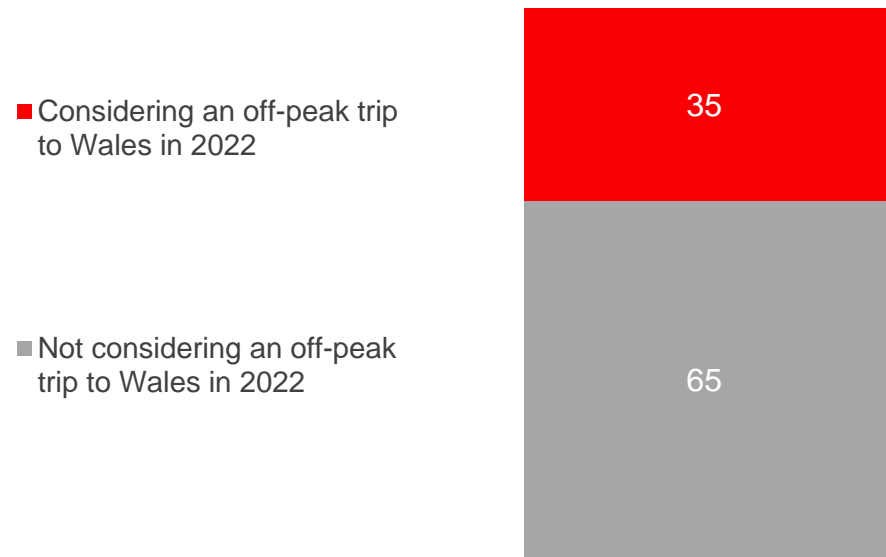
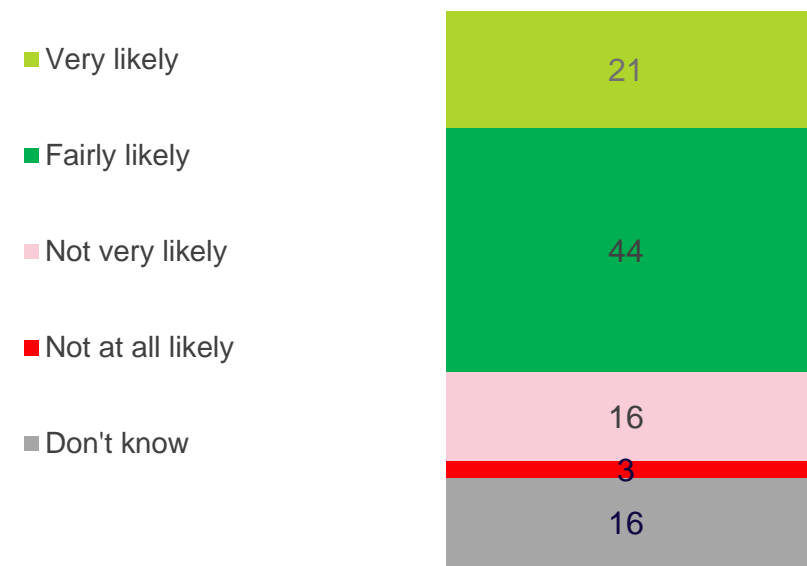


Figure 60. Likelihood of taking trip to Wales between October and March in future years, Percentage, non Oct-Mar intenders



F3a.When are you planning to take a holiday or short break in Wales in 2022? F3b.You indicated you are not planning to take a holiday or short break in Wales between October and March in 2022. How likely would you be to consider a Wales holiday or short break between October and March in future years?

Figure 54: Base: All 2022 Wales trip-intenders n=3,154; Figure 54 Base: All non off-peak intenders n=2,960

Barriers to taking off-peak trips in Wales in future years

- Amongst those not considering a trip to Wales between October and March, the weather was the most cited reason. Weather was a barrier particularly amongst those who plan on being active outdoors, suggesting this is an area communications may want to address.

Word cloud 1: barriers to off-peak trips to Wales



Selected quotes

“Unless the weather was unseasonably warm, I wouldn’t be keen as I like to do a lot of walking.”

"I prefer the longer daylight hours of the BST period. I like to be outdoors so cannot do so much after dark.."

“Because there is hardly anything to do in the Autumn and Winter plus it’s cold and wet.”

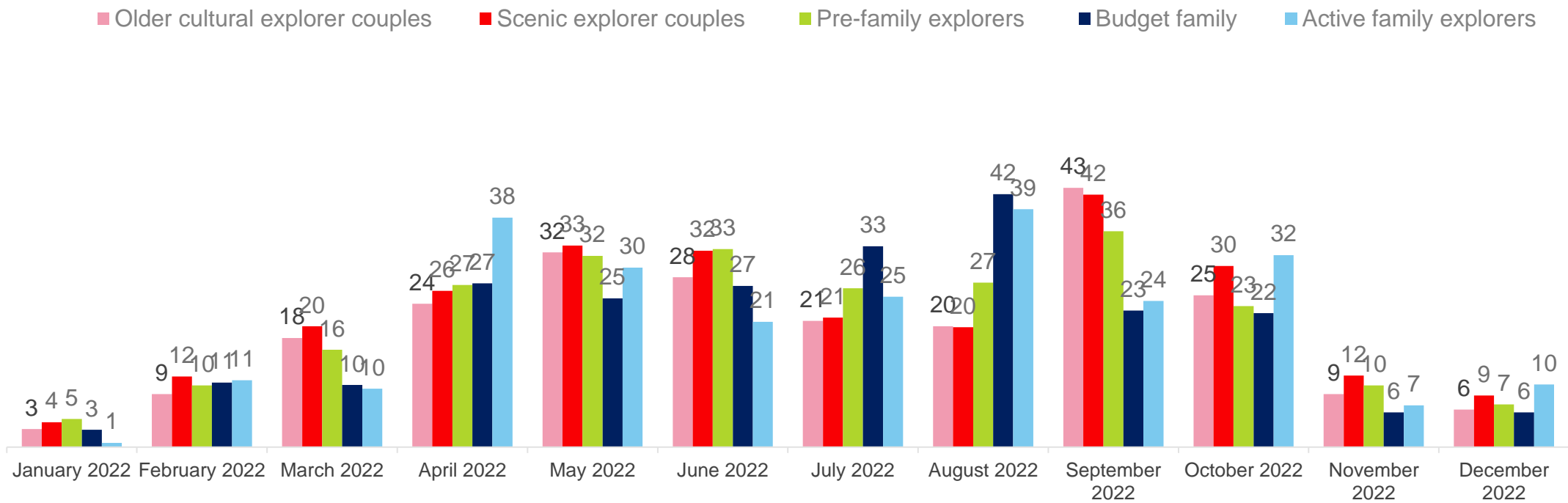
“I usually camp at the foot of Snowdon for many of my visits and camping between October and March can be damned cold..”

“Because although the weather can never be guaranteed in Wales (or indeed the UK) we like to give ourselves a fighting chance at some decent weather!.”

Month of intended Wales trip in 2022 by segment

- Consistent with trips taken in 2021, 'family segments' are most likely to take their Wales trip during the summer holidays, with non-family segments most likely to do so in September. Notably, 'active family explorers' are the most likely to take trips in April and October (likely during Easter and half-term)

Figure 61. Month of intended Wales trip in 2022, Percentage, Wales intenders



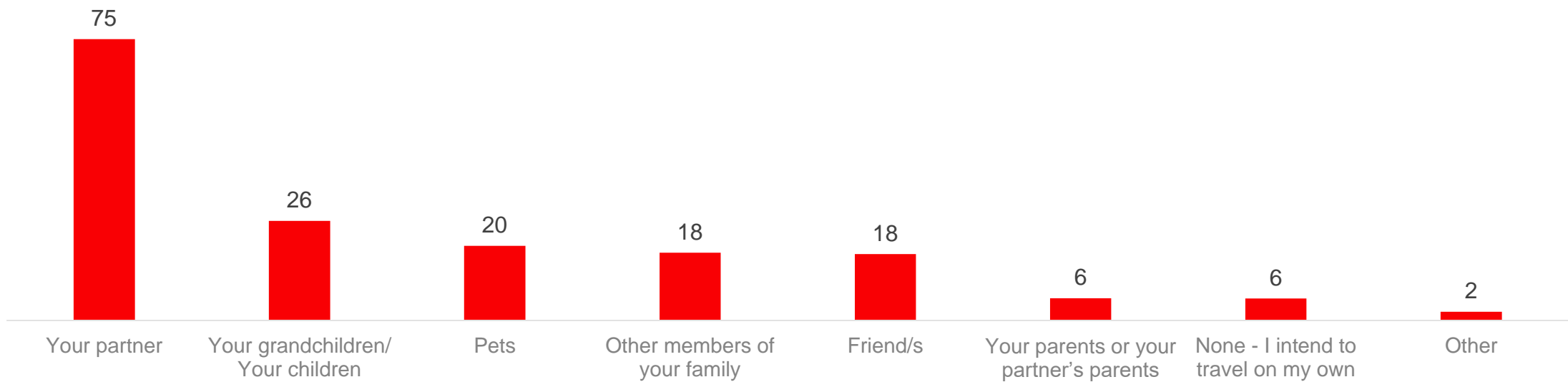
F3a. When are you planning to take a holiday or short break in Wales in 2022?
Base: Older cultural explorers n=777; Scenic explorer couples n=1294; Pre-family explorers n=541; Budget families n=244; Active family explorers n=145



Anticipated visitor party make-up for 2022 Wales trip

- The vast majority of Wales 2022 trip intenders are likely to take their trip with their partner (75%). 1 in 4 (26%) anticipate doing so with children, a further 1 in 5 (20%) with their pets.

Figure 62. Visitor party make-up for intended Wales trip in 2022, Percentage

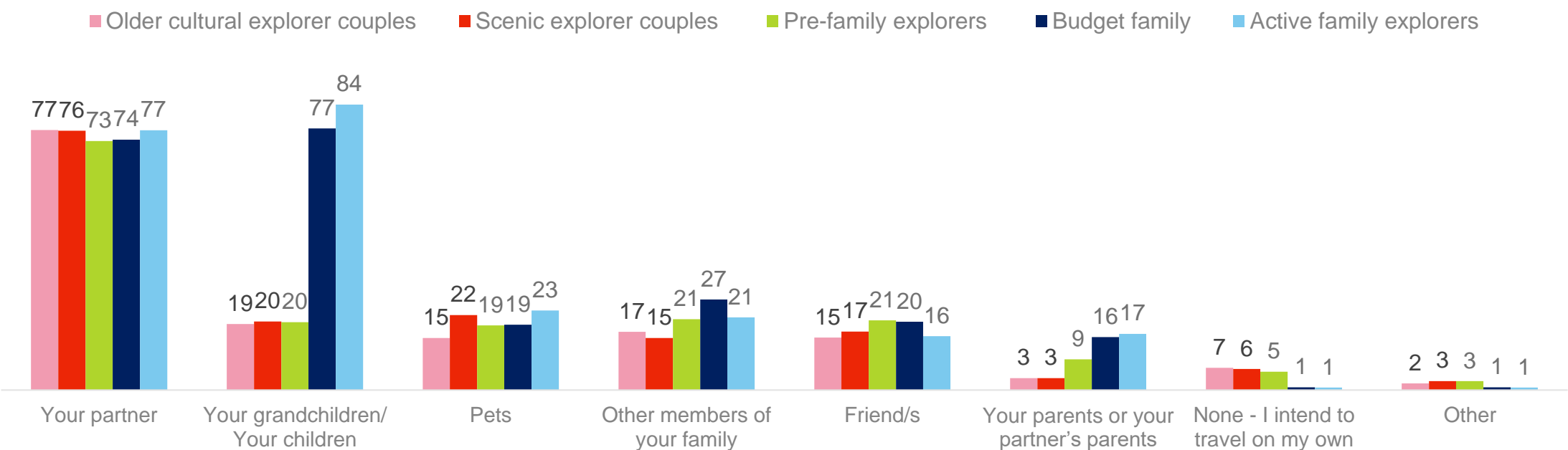


F4. Who, if anyone, is likely to accompany you on your next holiday or short break in Wales in 2022?
Base: All 2022 Wales trip-intenders n=3,154

Anticipated visitor party make-up for 2022 Wales trip by segment

- Unsurprisingly, the vast majority of trip-takers within ‘family segments’ anticipate taking a trip to Wales with ‘children/grandchildren’. They also show a higher likelihood of taking a trip with their ‘parents/partner’s parents’, implying they will take multi-generation trips.

Figure 63. Visitor party make-up for intended Wales trip in 2022, Percentage, by Visit Wales segments

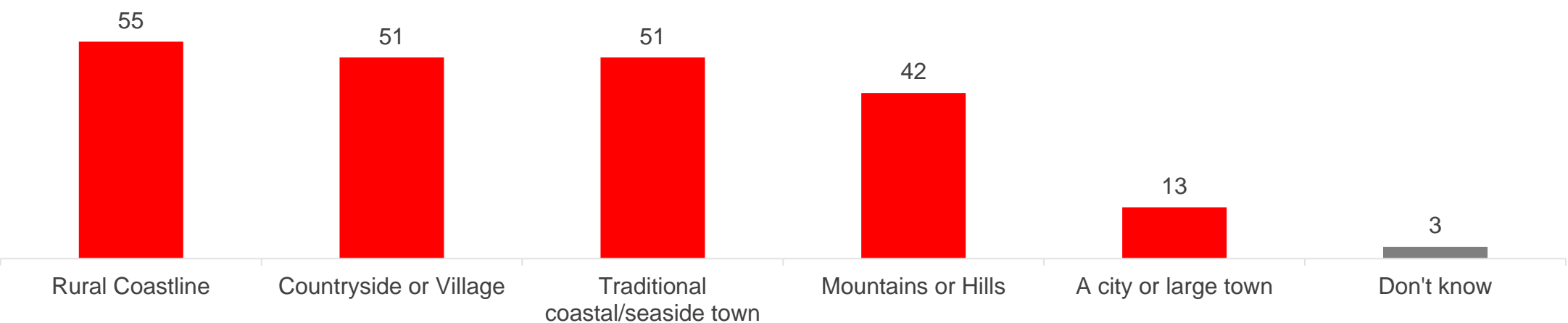


F4. Who, if anyone, is likely to accompany you on your next holiday or short break in Wales in 2022?
Base: Older cultural explorers n=777; Scenic explorer couples n=1294; Pre-family explorers n=541; Budget families n=244; Active family explorers n=145

Anticipated destination type for 2022 Wales trip

- Wales trip-intenders show a relatively equal intention to take an overnight 2022 trip to ‘rural coastline’, a ‘countryside or village’ or a ‘traditional coastal/seaside town’ – around half planning a trip to each. ‘Mountains or hills’ are also of interest to a high proportion of intenders.

Figure 64. Destination type for intended Wales trip in 2022, Percentage



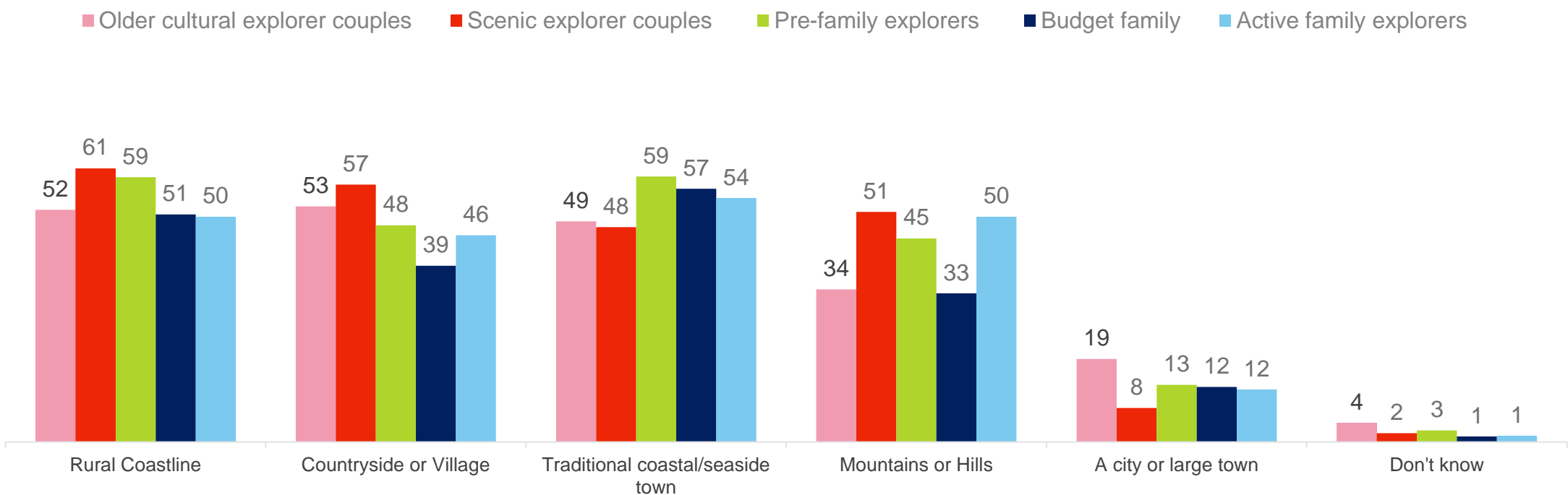
F6.Which of the following best describes the main types of destination you are likely to stay in during your next short break or holiday in Wales in 2022?

Base: All 2022 Wales trip-intenders n=3,154

Anticipated destination type for 2022 Wales trip by segment

- Across priority segments, there are some variations in intended destination type, ‘family’ and ‘pre-family’ segments the most likely to intend to visit a ‘traditional coastal/seaside town’. ‘Active family explorers’ demonstrate a higher interest than ‘budget families’ in ‘mountains or hills’, matched only by ‘scenic explorer couples’. ‘Older cultural explorer couples’ are the leading segment for city breaks.

Figure 65. Destination type for intended Wales trip in 2022, Percentage, by Visit Wales segments



F6.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 in 2022?

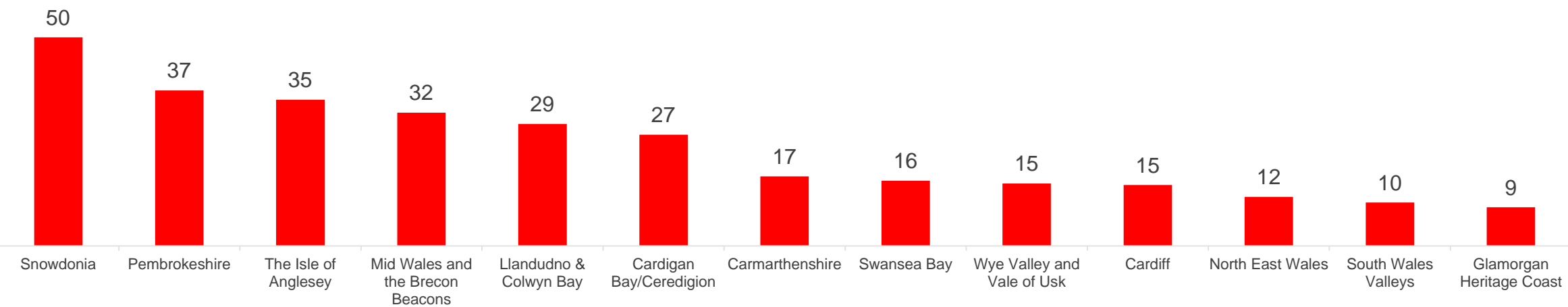
Base: Older cultural explorers n=777; Scenic explorer couples n=1294; Pre-family explorers n=541; Budget families n=244; Active family explorers n=145



Anticipated destination for 2022 Wales trip

- The most popular Wales destination for a 2022 trip is Snowdonia. Snowdonia is followed by Pembrokeshire and the Isle of Anglesey. The pattern of destination interest is broadly similar to destination visits amongst enquirers in 2021.

Figure 66. Destination for intended Wales trip in 2022, Percentage



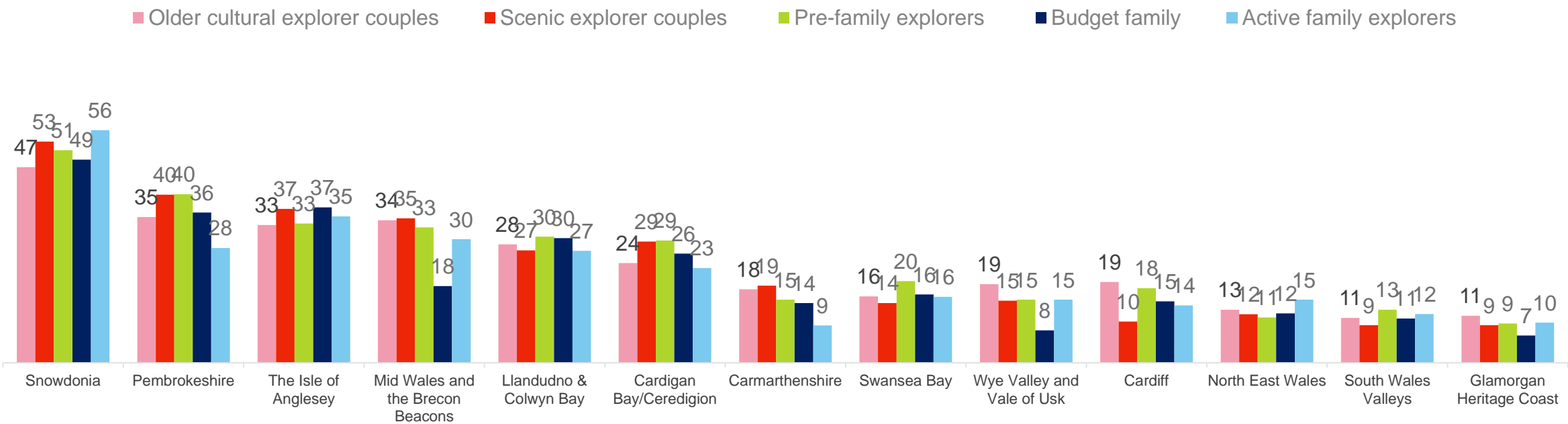
F5.Which of these areas do you plan on visiting on your next holiday or short break in Wales in 2022?
Base: All 2022 Wales trip-intenders n=3,154



Anticipated destination for 2022 Wales trip by segment

- ‘Active family explorers’ are the most likely to take a trip to Snowdonia, and the least likely to intend on going to Pembrokeshire. There is minimal variation across other segments, although it’s worth noting that ‘Budget Families’ index significantly lower on intention to take trips to ‘Mid Wales and the Brecon Beacons’ and ‘Wye Valley and the Vale of Usk’.

Figure 67. Destination for intended Wales trip in 2022, Percentage, by Visit Wales segments



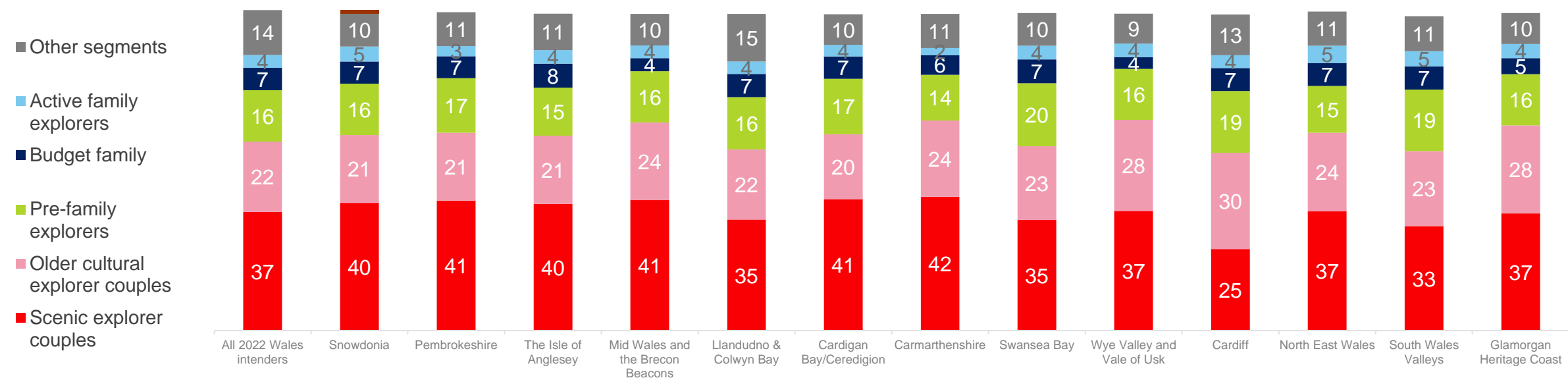
F5.Which of these areas do you plan on visiting on your next holiday or short break in Wales in 2022?
Base: Older cultural explorers n=777; Scenic explorer couples n=1294; Pre-family explorers n=541; Budget families n=244; Active family explorers n=145



Breakdown of Visit Wales segments by Wales destination

- The segment breakdown by destination is relatively consistent across destinations with the exception of Cardiff which indexes significantly lower than other destinations on 'scenic explorer couples' - perhaps unsurprisingly given this segment's preference for natural environments.

Figure 68. Breakdown of Visit Wales segments by Wales destination in 2022, Percentage.



Segment questions
Base: Snowdonia n=1,724; Pembrokeshire n=1,286; Mid Wales n=1,101; Llandudno and Colwyn Bay n=1,008; The Isle of Anglesey n=1,209; Ceredigion n=919; Swansea Bay.. n=539; Cardiff n=503; North East Wales n=405; Carmarthenshire n=575; Wye Valley n=517; The Valleys of South Wales n=359; Glamorgan Heritage Coast n=320



Breakdown of region of origin by Wales destination in 2022

- As with trips-taken, destination preference for 2022 trips tends to correlate with proximity to that area – residents of the North West of England making up the largest proportion of intenders to Snowdonia and the Isle of Anglesey; the West Midlands the largest proportion of intenders to Ceredigion; and the South East of England to most destinations in South Wales.

Table 10. Breakdown of region of origin by Wales destination in 2022, Percentage, Top 3 per region underlined

	Snowdonia	Pembrokeshire	The Isle of Anglesey	Mid Wales and the Brecon Beacons	Llandudno & Colwyn Bay	Cardigan Bay/ Ceredigion	Carmarthenshire	Swansea Bay	Wye Valley and Vale of Usk	Cardiff	North East Wales	South Wales Valleys	Glamorgan Heritage Coast
North West	<u>22%</u>	<u>13%</u>	<u>29%</u>	<u>13%</u>	<u>29%</u>	<u>14%</u>	<u>12%</u>	9%	13%	10%	<u>24%</u>	8%	<u>11%</u>
West Midlands	<u>17%</u>	<u>16%</u>	<u>16%</u>	<u>18%</u>	<u>17%</u>	<u>17%</u>	<u>12%</u>	13%	<u>15%</u>	<u>13%</u>	<u>11%</u>	<u>14%</u>	10%
South East	<u>11%</u>	<u>14%</u>	<u>9%</u>	<u>15%</u>	9%	<u>13%</u>	<u>15%</u>	<u>17%</u>	<u>15%</u>	<u>18%</u>	<u>10%</u>	<u>18%</u>	<u>16%</u>
South West	8%	<u>14%</u>	6%	12%	5%	11%	<u>14%</u>	<u>15%</u>	<u>17%</u>	<u>13%</u>	4%	<u>13%</u>	<u>14%</u>
London	9%	9%	7%	10%	6%	9%	11%	<u>15%</u>	9%	<u>13%</u>	9%	<u>13%</u>	<u>11%</u>
East Midlands	8%	8%	<u>8%</u>	7%	8%	8%	7%	8%	7%	5%	8%	8%	9%
Yorkshire and The Humber	8%	6%	9%	5%	<u>10%</u>	8%	5%	4%	5%	5%	<u>10%</u>	4%	6%
East of England	5%	7%	4%	8%	3%	6%	7%	6%	8%	8%	6%	9%	8%
Wales	4%	6%	4%	5%	3%	7%	7%	5%	5%	5%	5%	5%	4%
Scotland	3%	3%	3%	3%	3%	3%	4%	4%	4%	4%	5%	5%	5%
Ireland/ NI	2%	2%	3%	1%	3%	1%	2%	2%	2%	4%	4%	2%	4%
North East	2%	2%	3%	3%	2%	2%	4%	2%	1%	1%	4%	2%	3%

Demographics questions

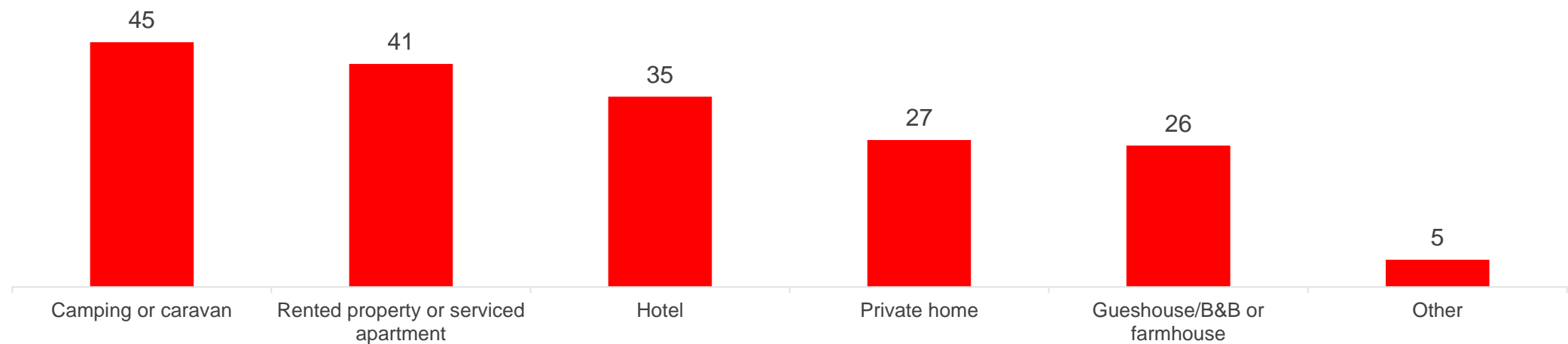
Base: Snowdonia n=1,724; Pembrokeshire n=1,286; Mid Wales n=1,101; Llandudno and Colwyn Bay n=1,008; The Isle of Anglesey n=1,209; Ceredigion n=919; Swansea Bay.. n=539; Cardiff n=503; North East Wales n=405; Carmarthenshire n=575; Wye Valley n=517; The Valleys of South Wales n=359; Glamorgan Heritage Coast n=320



Accommodation type for intended Wales trip in 2022

- Similar to trips taken in 2021, camping or caravan is the leading accommodation type for intended Wales trips in 2022 (driven by campervan/motorhome and ‘static caravan – not owned by you’), followed by ‘rented property or serviced apartment’.

Figure 69. Destination type for intended Wales trip in 2022, Percentage



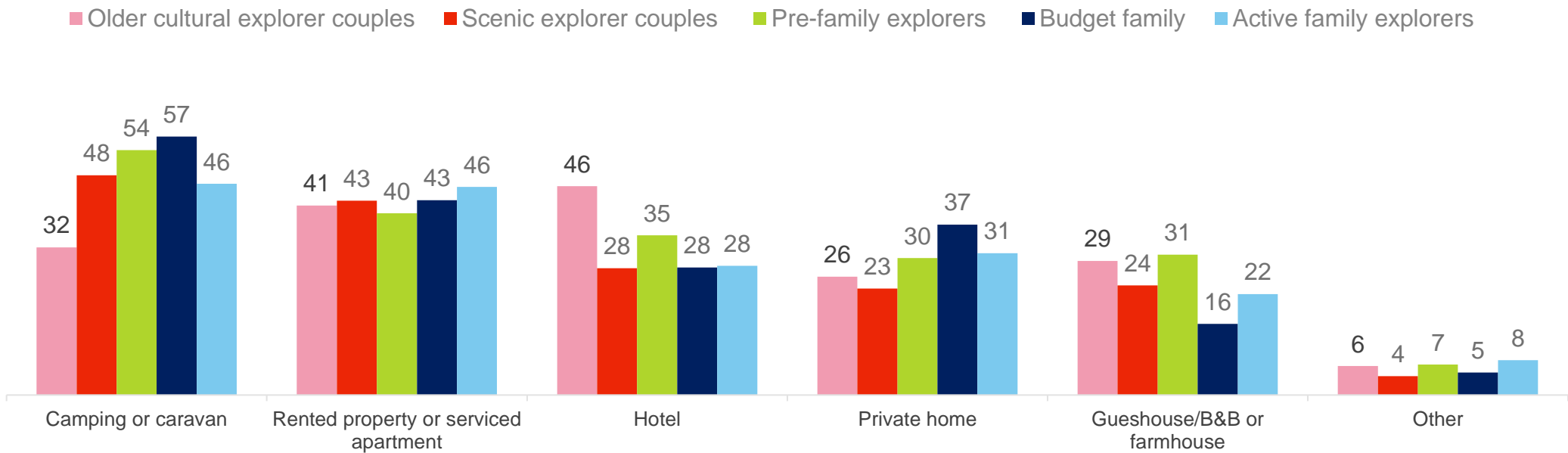
F9. What type/s of accommodation do you expect to be staying in during your next short break or holiday in Wales in 2022?

Base: All 2022 Wales trip-intenders n=3,154

Accommodation type for intended Wales trip in 2022 by segment

- Also consistent with 2021 trips taken, there is significant variation in accommodation preference by Visit Wales segment. ‘Older cultural explorer couples’ are most likely to anticipate staying in a hotel, whilst ‘budget families’, ‘pre-family explorers’ and ‘scenic explorer couples’ are most likely to choose ‘camping or caravan’. As with trips taken, ‘budget families’ high preference for ‘camping or caravan’ is driven by intention to stay in ‘a static caravan – not owned by you’ and a tent, whilst for ‘scenic explorer couples’ and ‘pre-family explorers’ it is driven by stays in a campervan/motorhome’.

Figure 70. Destination type for intended Wales trip in 2022, Percentage, By Visit Wales segments



F9. What type/s of accommodation do you expect to be staying in during your next short break or holiday in Wales in 2022?

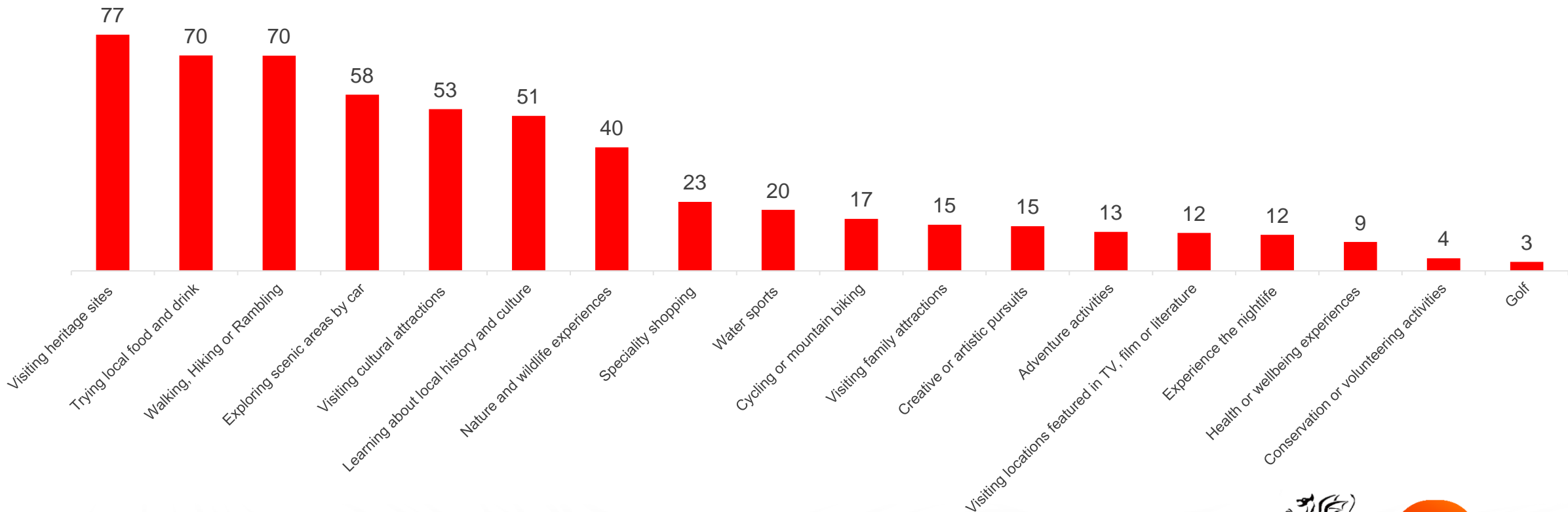
Base: Older cultural explorers n=777; Scenic explorer couples n=1294; Pre-family explorers n=541; Budget families n=244; Active family explorers n=145



Anticipated activities for intended Wales trip in 2022

- ‘Visiting heritage sites’, ‘trying local food and drink’ and ‘walking, hiking or rambling’ are the three activities Wales 2022 intenders are most likely to do on their Wales trip. There is also interest in a range of other activities, in particular ‘exploring scenic areas by car’, ‘visiting cultural attractions’, ‘learning about local history and culture’ and ‘nature and wildlife experiences’.

Figure 71. Anticipated activities for intended Wales trip in 2022, Percentage



F7.Which, if any, of these activities would you seriously consider doing on your next short break or holiday in Wales in 2022?

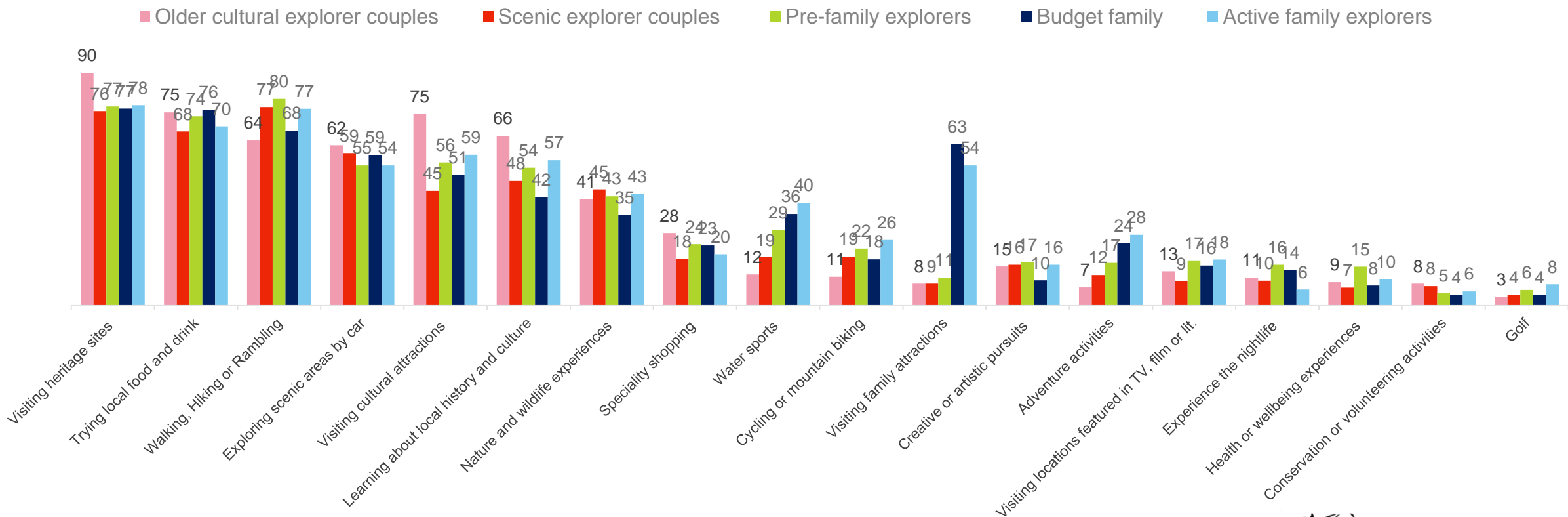
Base: All 2022 Wales trip-intenders n=3,154



Anticipated activities for intended Wales trip in 2022 by segment

- Unsurprisingly, there is significant variation in anticipated activities on Wales trip by segment – ‘older cultural explorer couples’ most likely to visit heritage sites/cultural attractions and to learn about local history and culture; family segments most likely to visit family attractions; ‘scenic explorer couples’, ‘pre-family explorers’ and ‘active family explorers’ indexing high on ‘walking, hiking or rambling’.

Figure 72. Anticipated activities for intended Wales trip in 2022, Percentage, By Visit Wales segments



F7. Which, if any, of these activities would you seriously consider doing on your next short break or holiday in Wales in 2022?

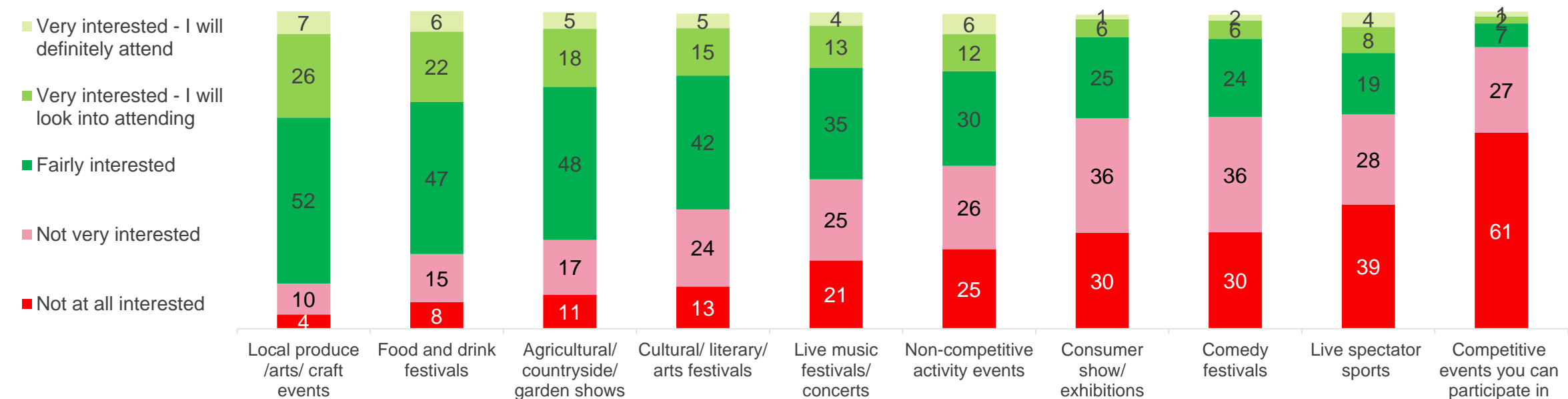
Base: Older cultural explorers n=777; Scenic explorer couples n=1294; Pre-family explorers n=541; Budget families n=244; Active family explorers n=145



Interest in attending festivals on Wales 2022 trip

- Of the types of festivals and events tested, ‘local produce/arts/craft’, ‘food and drink’ and ‘agricultural/countryside/garden’ events generated the most interest from Visit Wales enquirers. ‘Competitive events’ and ‘live spectator sport’ generated the lowest interest.

Figure 73. Interest in attending festivals and events on Wales 2022 trip, Percentage.



F8. How, if at all, interested would you be in attending the below types of festivals or events on your short break or holiday in Wales in 2022?

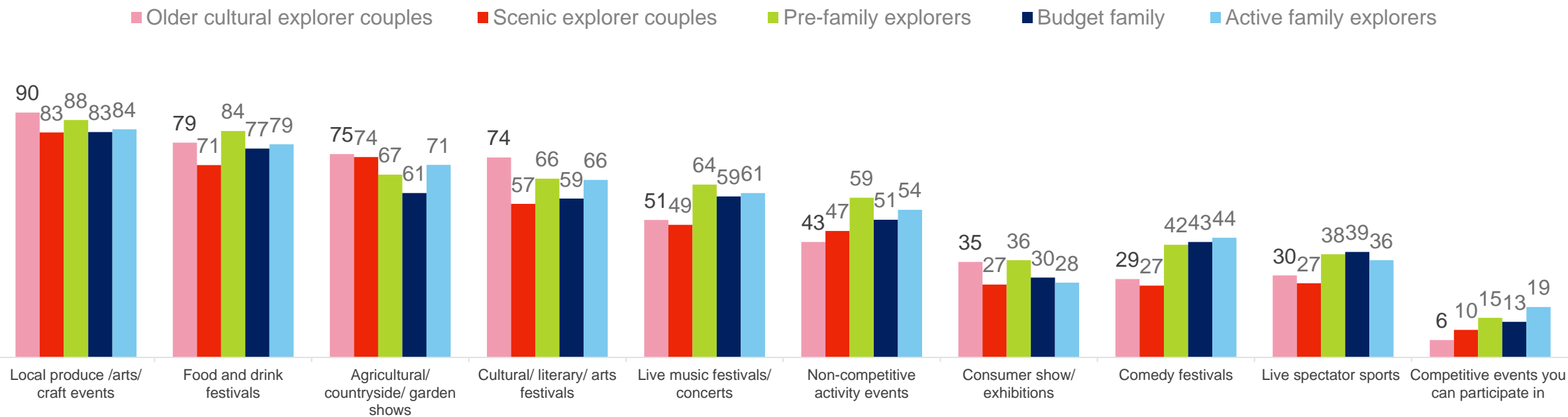
Base: All 2022 Wales trip-intenders n=3,154



Interest in attending festivals on Wales 2022 trip by segment

- Events interest is relatively consistent across segments, with some notable differences. Most notably, ‘older cultural explorer couples’ and ‘scenic explorer couples’ are significantly less likely than other segments to be interested in events that involve live music, comedy, activities or sports.

Figure 74. Interest in attending festivals on Wales 2022 trip, Net percentage very interested.



F8. How, if at all, interested would you be in attending the below types of festivals or events on your short break or holiday in Wales in 2022?

Base: Older cultural explorers n=777; Scenic explorer couples n=1294; Pre-family explorers n=541; Budget families n=244; Active family explorers n=145



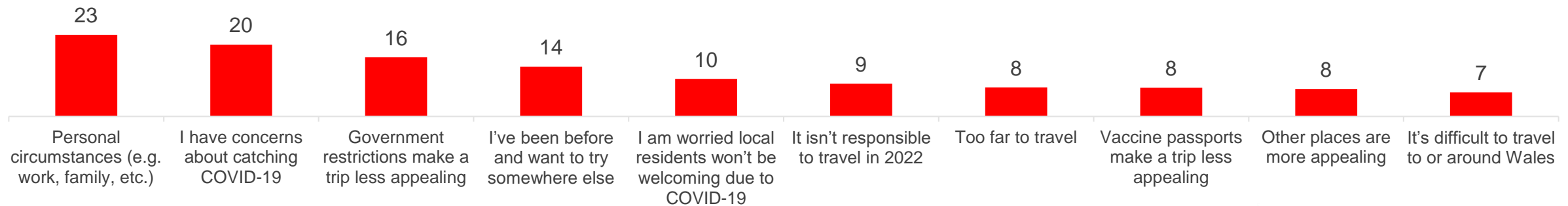
Barriers to visiting Wales in 2022



Reason for not intending to visit Wales in 2022

- There is no stand-out reason that non-Wales intenders are not considering Wales for a trip in 2022. However, it is worth noting that, beyond personal reasons, concerns around catching COVID-19 remain a barrier, as do potential government restrictions. For 1 in 7, the fact they have been before and want to try somewhere else is a barrier.

Figure 75. Reason for not intending to visit Wales for an overnight trip in 2022, Percentage.



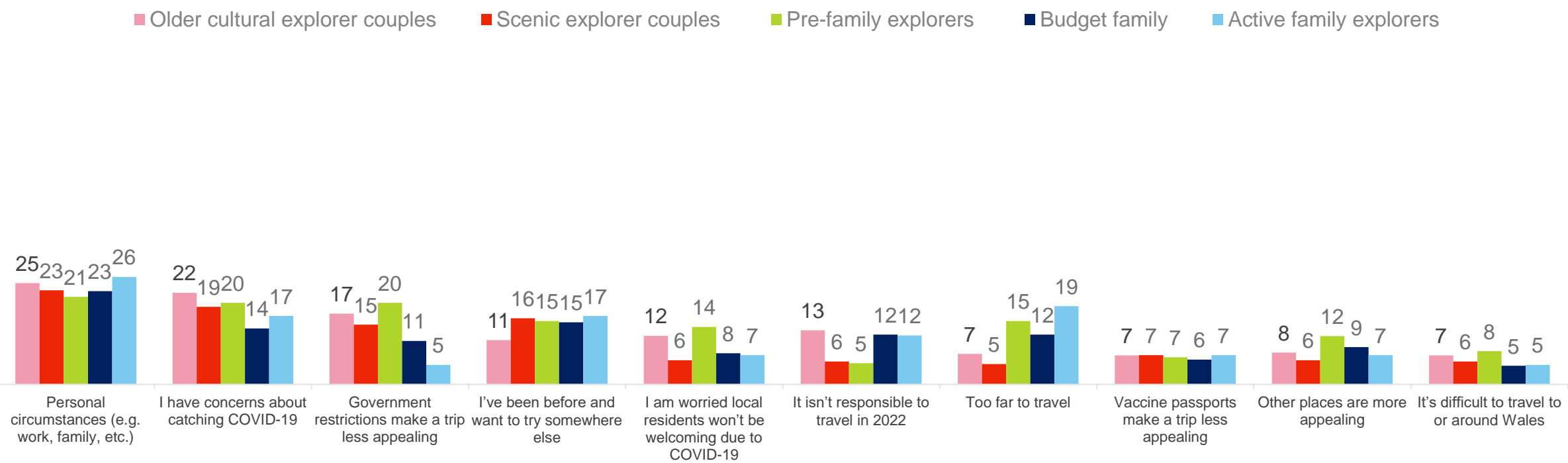
F10.What are the reasons that you are not planning to visit Wales for a holiday or short break in 2022?

Base: Non 2022 trip intenders n=1,063

Reason for not intending to visit Wales in 2022 by segment

- Concerns around COVID and government restrictions are strongest as a barrier for ‘non-family’ segments.

Figure 76. Reason for not intending to visit Wales for an overnight trip in 2022, Percentage, by Visit Wales segments



F10.What are the reasons that you are not planning to visit Wales for a holiday or short break in 2022?
Base: Older cultural explorers n=296; Scenic explorer couples n=323; Pre-family explorers n=136; Budget families n=66; Active family explorers n=42



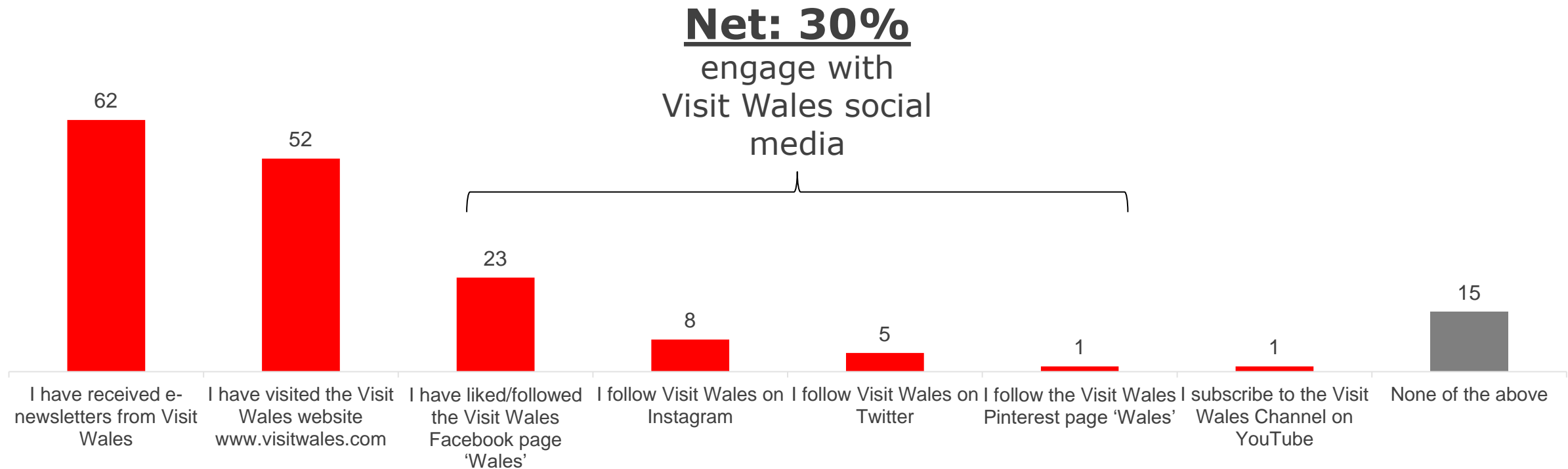
Marketing evaluation



Engagement with Visit Wales marketing and communications

- Perhaps unsurprisingly given the method of recruitment for this research, Visit Wales e-newsletters was the channel of communication enquirers were most likely to have engaged with in 2021, followed by the Visit Wales website. 3 in 10 enquirers had engaged with Visit Wales social media, driven by likes/follows of their Facebook page

Figure 77. Engagement with Visit Wales marketing and communications, Percentage.



E1a. Thinking about all the contact you had with Visit Wales in 2021, which of the following apply to you?

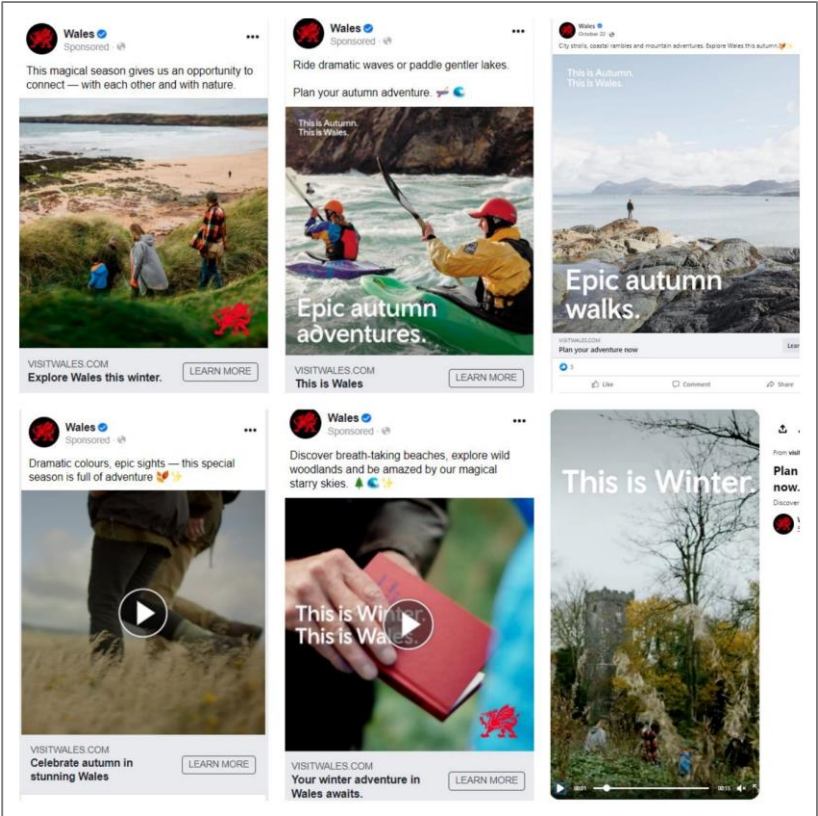
Base: All Visit Wales enquirers n=4,522

Summary of marketing tested

Films tested



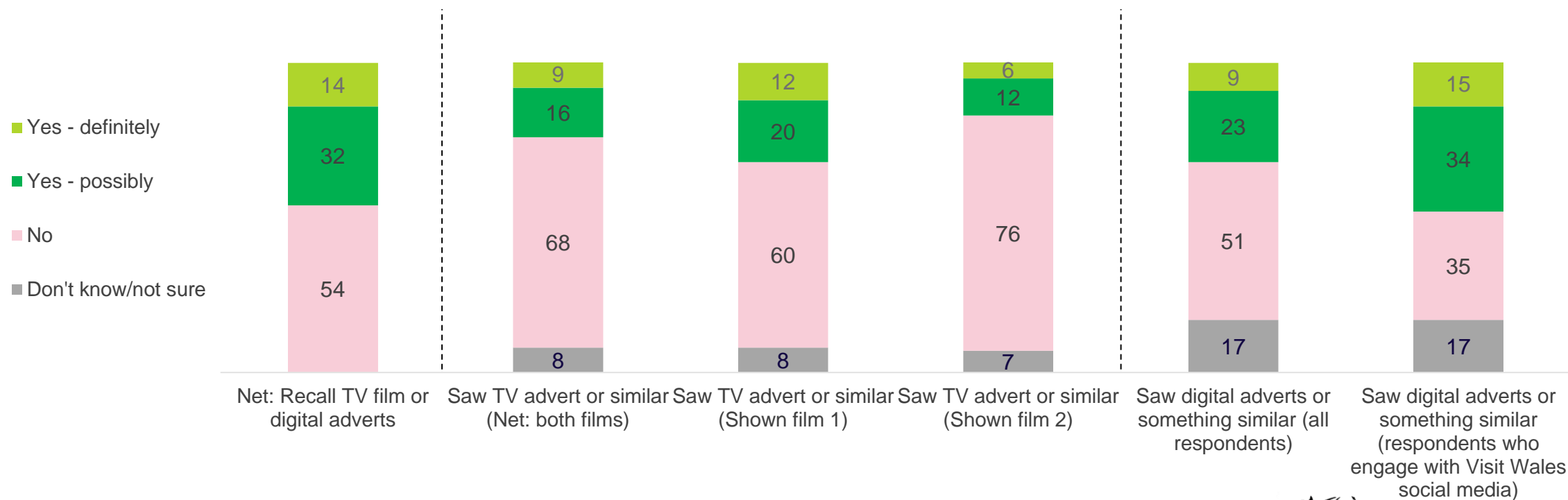
Digital marketing tested



Recall of Visit Wales marketing

- In total, 1 in 7 (14%) of Visit Wales enquirers had *definitely* seen either a TV advert or digital advert in the previous 3 months, rising to nearly half (46%) *definitely or possibly* seeing it.
- Recall was highest for the Visit Wales TV advert – particularly ‘Film 1’ (see previous page) – 32% having definitely/possibly seen it, compared to 18% definitely/possibly seeing ‘Film 2’.
- Around 3 in 10 (31%) recall definitely/possibly seeing a digital advert, rising to nearly half (49%) of enquirers that engage with Visit Wales social media

Figure 78. Recall of Visit Wales marketing, Percentage, By all enquirers,



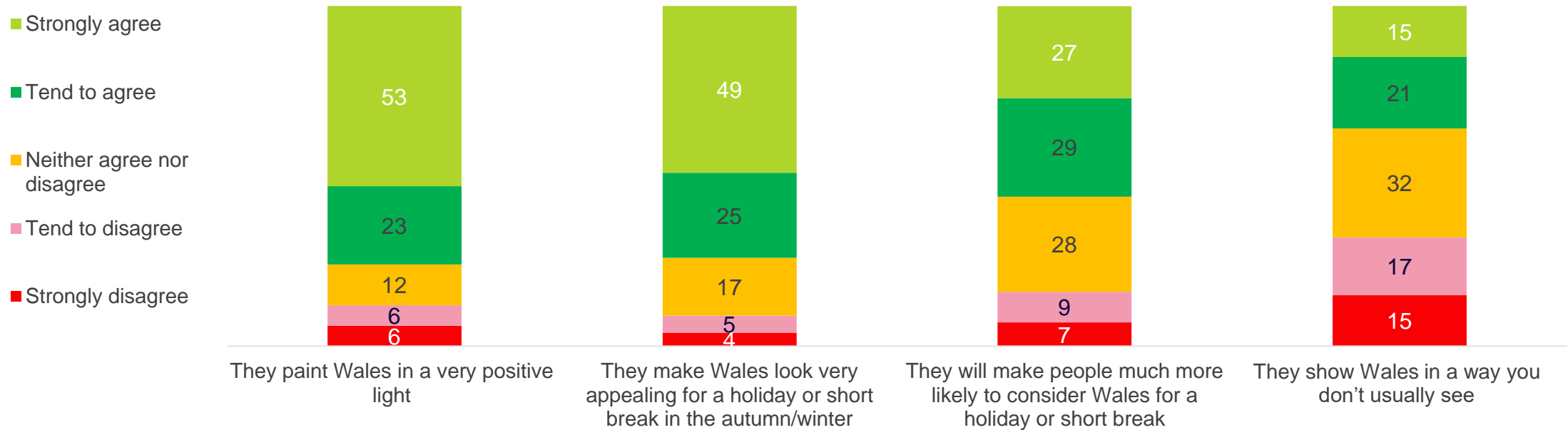
E2. Do you recall seeing this TV advert or something very similar in the last few months? E3. Have you seen these digital adverts or something very similar in the last few months?
Base: All Visit Wales enquirers n=4,522; Shown film 1 n=c.2,250; Shown Film 2 n=c.2,250; engage with Visit Wales social media n=1,379



Perceptions of Visit Wales marketing

- A strong majority of Visit Wales enquirers agree that the Visit Wales 'off-peak' marketing 'paints Wales in a very positive light' (76% strongly/tend to agree) and 'make Wales look very appealing for holiday or short break in the autumn/winter' (74%). A majority also agree 'it will make people more likely to consider Wales for a holiday or short break' (56%), although 1 in 6 (16%) disagree with this. Opinion was split on whether the adverts show Wales 'in a way you don't usually see'.

Figure 79. Perceptions of Visit Wales marketing , Percentage, By all enquirers



E4. Now thinking of the films and adverts we have just shown you as one whole marketing campaign, how would you describe them?

Base: All Visit Wales enquirers n=4,522

Implicit impact of Visit Wales marketing

- At an implicit level, there are signs that off-peak marketing may have had an influence on intention – those that *definitely* recall seeing it, more likely to consider Wales for an off-peak trip, and marginally less likely to cite ‘Wales weather’ as a barrier to visiting in 2022 (although the latter difference is not statistically significant).

Figure 80. Likelihood of taking an off-peak trip to Wales in future years, by recall of Visit Wales marketing

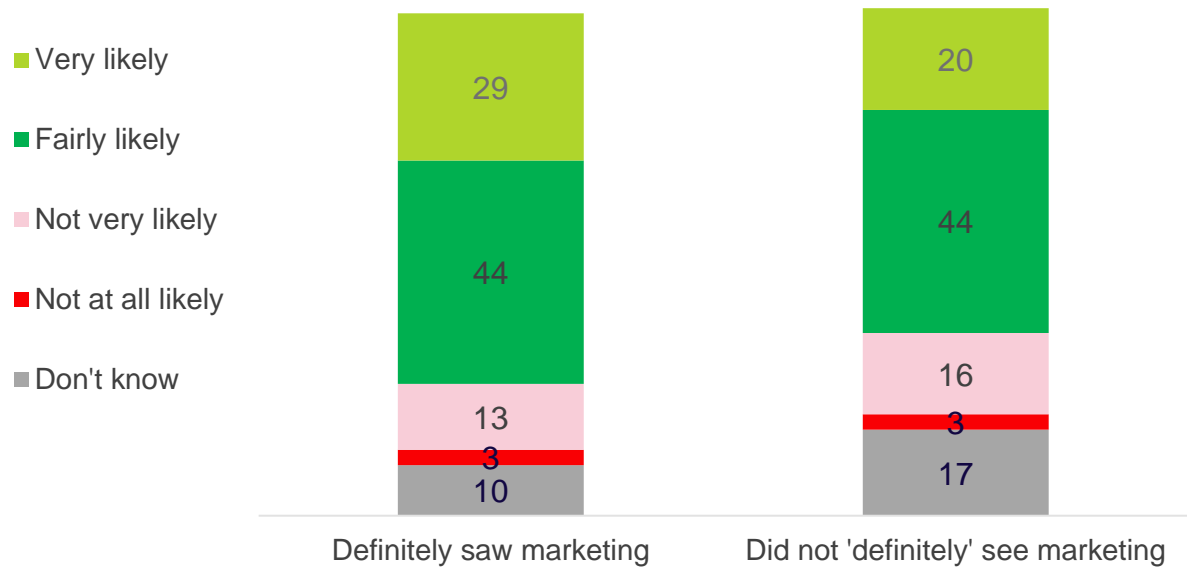


Figure 81. Proportion that cite Weather conditions as a barrier to visiting Wales, by recall of Visit Wales marketing



F3b.You indicated you are not planning to take a holiday or short break in Wales between October and March in 2022.

How likely would you be to consider a Wales holiday or short break between October and March in future years?

F10.What are the reasons that you are not planning to visit Wales for a holiday or short break in 2022?

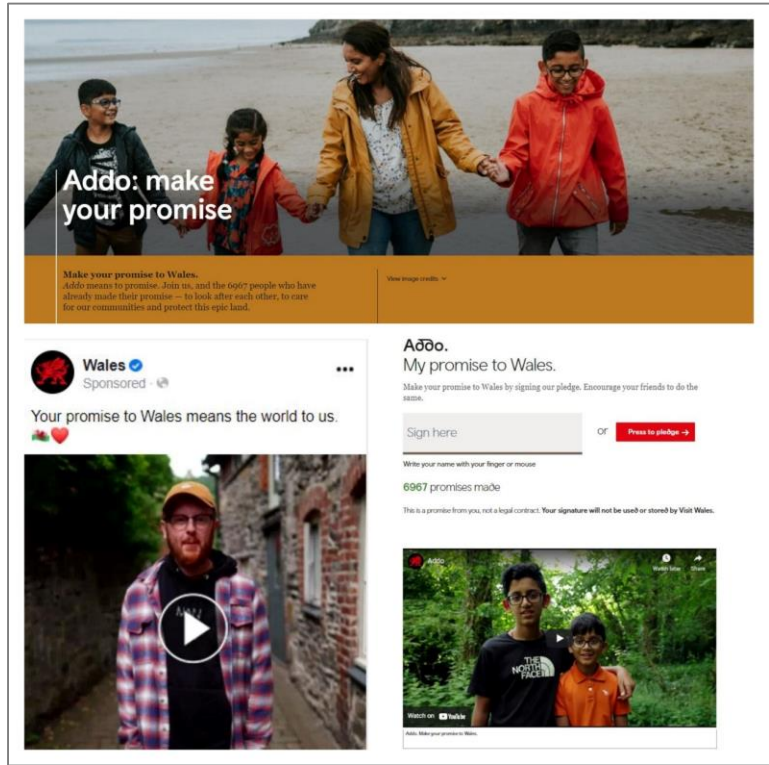
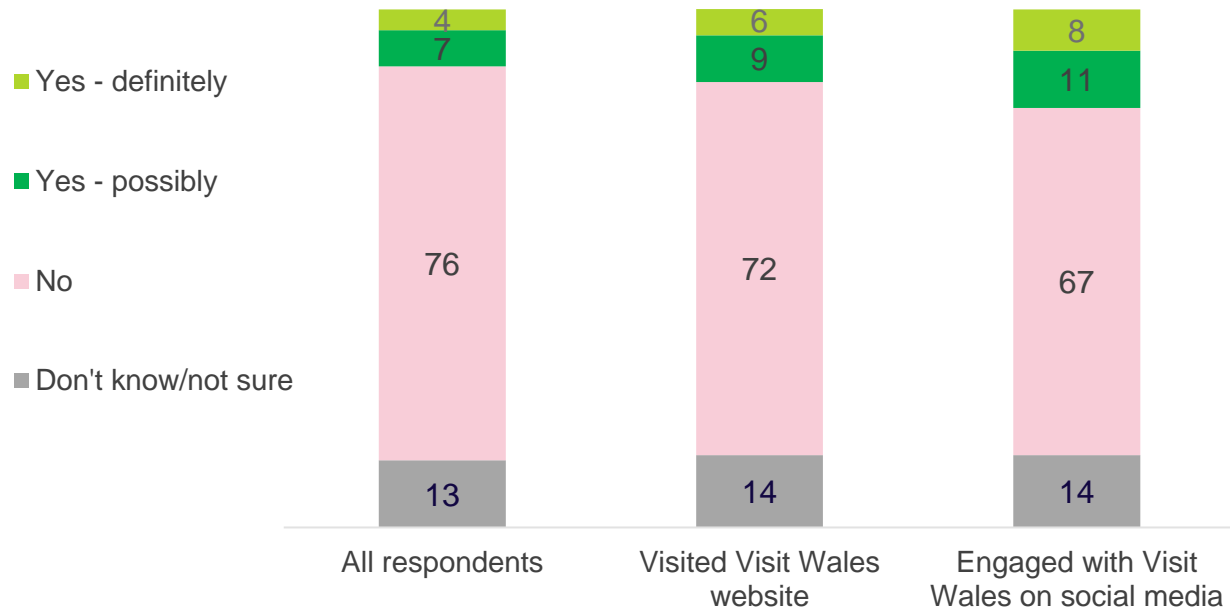
Base: Figure 74: Definitely saw marketing n=353; Not definitely saw marketing 2,607; Figure 75: Definitely saw

marketing n=85; Not definitely saw marketing 978:

Recall of Visit Wales ‘Addo’ promise

- Around 1 in 9 (11%) Visit Wales enquirers remember seeing the Visit Wales ‘Addo’ promise in the previous 12 months, rising amongst those that went to the Visit Wales website and who engage with Visit Wales social media

Figure 82. Recall of ADDO promise, Percentage, By all enquirers and engagement with Visit Wales information



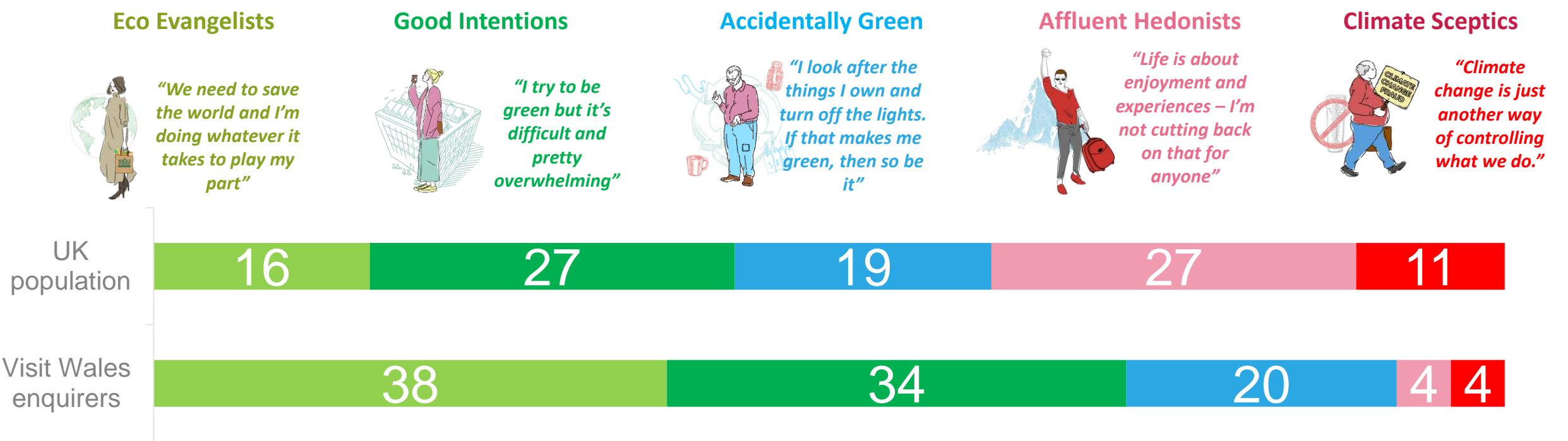
Understanding Attitudes to Sustainability



Breakdown of BVA BDRC sustainability segments

- Compared to the UK population, Visit Wales enquirers index significantly higher on BVA BDRC's 'Eco Evangelists' and 'Good Intentions' segments. They also index significantly lower on 'Affluent Hedonists' and 'Climate Sceptics'. Generally this suggests that Visit Wales enquirers assign a high level of importance to sustainability.

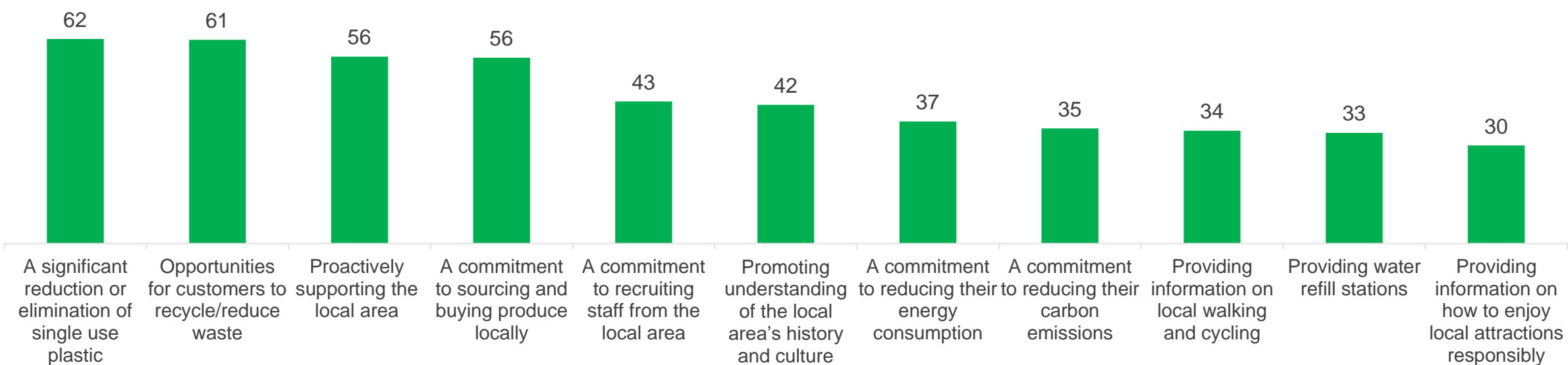
Figure 83. Breakdown of Visit Wales enquirers by BVA BDRC sustainability segments



Sustainable actions tourism businesses should prioritise

- Of the range of options proposed, Visit Wales enquirers are most likely to state that tourism businesses should prioritise ‘a significant reduction in single use plastic’ and ‘opportunities for customers to recycle/reduce waste’.
- Local activity was also prominent - ‘proactively supporting the local area’, ‘a commitment to sourcing and buying produce locally’, ‘a commitment to recruiting staff from the local area’, and ‘promoting understanding of the local area’s history and culture’ making up the remainder of the top six most important actions.

Figure 84. Sustainable actions tourism businesses should prioritise, Percentage, Top 11



G7.Which, 3-4 of the following actions do you believe are most important for tourism businesses to take to become more sustainable? G8.And which 3-4 of these actions do you believe are most important for tourism businesses to take to become more sustainable?

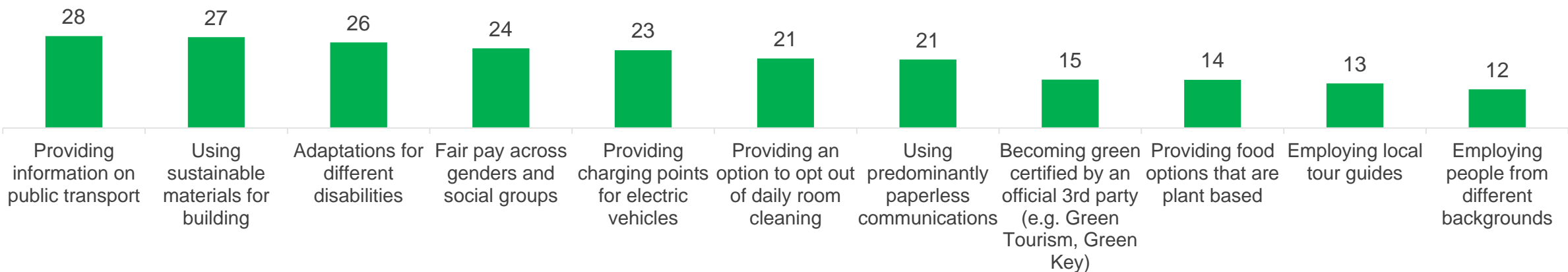
Base: All Visit Wales enquirers n=4,522



Sustainable actions tourism businesses should prioritise

- ‘Employing people from different backgrounds’ and ‘employing local tour guides’ were the sustainable actions enquirers think are least important to prioritise.

Figure 85. Sustainable actions tourism businesses should prioritise, Percentage, Bottom 11



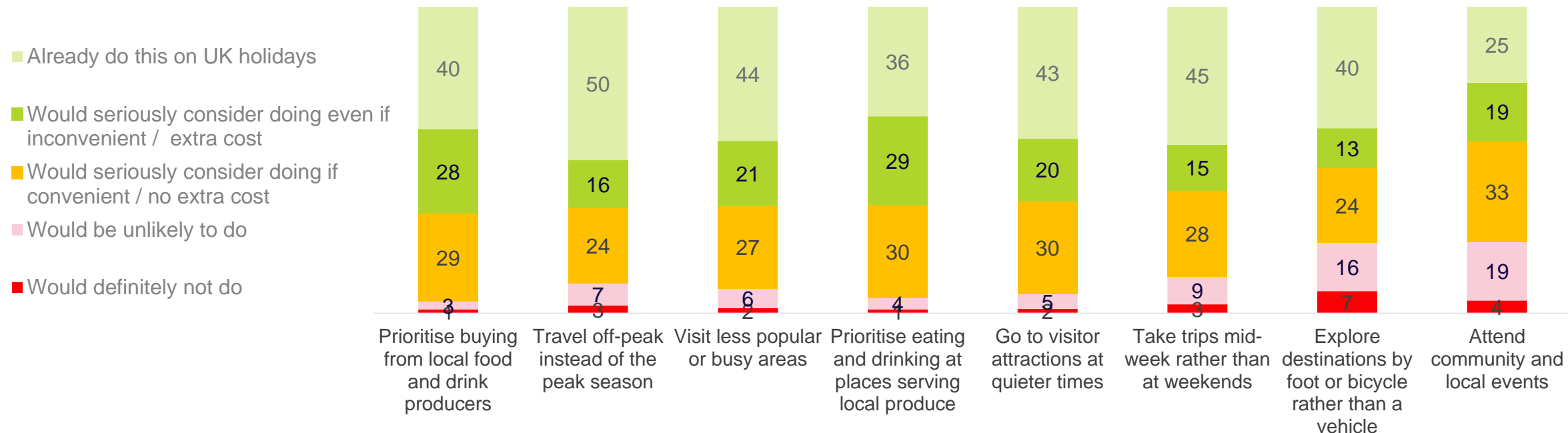
G7.Which, 3-4 of the following actions do you believe are most important for tourism businesses to take to become more sustainable? G8.And which 3-4 of these actions do you believe are most important for tourism businesses to take to become more sustainable?

Base: All Visit Wales enquirers n=4,522

Attitudes to individual sustainable actions on domestic trips

- In terms of sustainable actions for the individual, Visit Wales enquirers are most likely to ‘already do/would seriously consider if no extra cost’ ‘prioritising buying food from local producers’, ‘travelling off-peak instead of the peak season’ and ‘visiting less popular or less busy areas’. The openness to travelling off-peak is linked to the low proportion of families within the sample.

Figure 86. Attitude to individual sustainable actions, Percentage, By all enquirers, Top 8



G9a.How likely would you be to do the following ‘sustainable behaviours’ on your UK short breaks and holidays in the next few years?

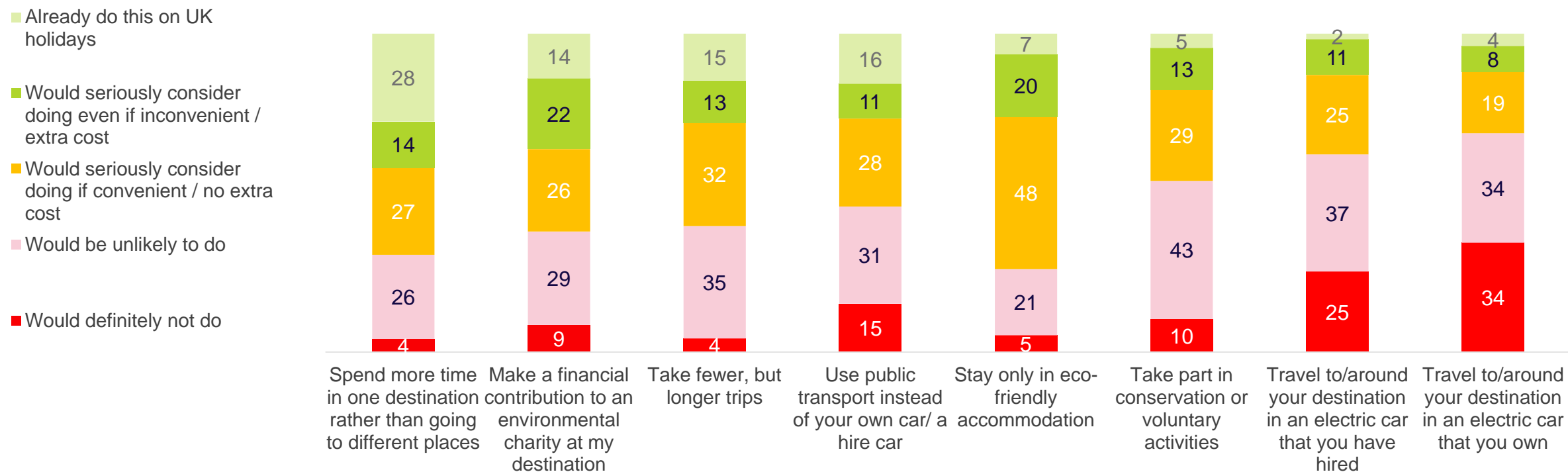
Base: All Visit Wales enquirers n=4,522



Attitudes to individual sustainable actions on domestic trips

- Visit Wales enquirers are least likely to be willing to ‘travel to/around their destination in an electric car’.. There is also a low willingness to ‘take part in conservation/voluntary activities’ and to ‘stay only in eco-friendly accommodation’ if inconvenient/extra cost.

Figure 87. Attitude to individual sustainable actions, Percentage, By all enquirers, Bottom 8



G9a.How likely would you be to do the following ‘sustainable behaviours’ on your UK short breaks and holidays in the next few years?

Base: All Visit Wales enquirers n=4,522



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 (4,522)	+/- 0.6%	+/- 1.2%	+/- 1.5%
Wales visitors in 2021 (2,264)	+/- 0.9%	+/- 1.6%	+/- 2.1%
Wales visitors in 2021 from Older Cultural Explorer Couples segment (452)	+/- 2.0%	+/- 3.7%	+/- 4.6%
Wales visitors in 2021 to Cardiff (157)	+/- 3.4%	+/- 6.3%	+/- 7.8%
Wales visitors in 2021 to Glamorgan Heritage Coast and Countryside (63)	+/- 5.4%	+/- 9.9%	+/- 12.3%