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Visit Wales Tourism Market Demand Report – Ireland June 2022

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This document is also available in Welsh.

Full Research Report: Visit Wales Market Demand Report – Ireland June 2022
Cardiff: Welsh Government, GSR report number 56/2022

Available at: WG website <https://gov.wales/tourism-market-demand-reports-june-2022>

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

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Background and Methodology



Background

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

- The factors influencing holiday and short break choice
- Types of destination and experiences favoured on holidays and short breaks
- Awareness and perceptions of destinations within the UK for a holiday or short break
- Perceptions of Wales as a holiday or short break destination and awareness of destinations within Wales
- Perceptions of Wales as an 'out of season' holiday destination
- Engagement with Visit Wales information channels and marketing
- Attitudes to sustainability at tourism destinations
- Profiling and demographics

Methodology

Residents of the Republic of Ireland were contacted through an online panel which could be completed via desktop or mobile device. To qualify for the survey, participants had to fulfil criteria that makes them a potential overnight trip-taker to the UK. They must:

- Live in the Republic of Ireland
- Be a holiday or short break decision-maker – making most overnight trip decisions themselves, or making them with someone else
- Be very/fairly likely to take a holiday or short break in the UK in the next few years

Fieldwork took place from 22nd June to 29th June 2022.

There were 604 completed surveys. The data was then weighted to be representative of Irish residents likely to take a UK trip in the next few years, ensuring comparability to previous studies. Data was weighted by gender, age, social grade and region of residence.

The survey took 25 minutes to complete on average and the research achieved an incidence rate of 70%, compared to 75% in 2020. This in itself suggests that the size of the Irish market for UK travel has shrunk since 2020.

Where possible, comparisons are made to the last survey of this type, conducted before the pandemic in January 2020. Please note, some differences may be driven by seasonal changes in attitudes. Although other differences may relate to concerns around the pandemic or the cost of living crisis.

Definitions used in this report/1

In this report we look at the profiles and attitudes of a number of separate audiences:

Definitions used include:

- **UK trip intenders:** The total survey sample. Residents of the Republic of Ireland who are very or fairly likely to take a UK holiday or short break in the next few years
- **Wales trip intenders:** Residents of the Republic of Ireland who are definitely or probably intending to take a holiday or short break in Wales in the next 12 months
- **Wales out of season trip intenders:** Residents of the Republic of Ireland who are very or fairly open to taking a holiday/short break in Wales outside of the main summer season – that is between September and April

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

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

Definitions used in this report/2

This report also includes reference to VisitBritain's global audience segments. These are based on research across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. There are five segments in total, defined as below:

- **Buzzseekers:** Free spirited and spontaneous, they like holidays full of action and excitement)
- **Explorers:** They enjoy outdoors, must see sites, and embracing local cultures at a more relaxed pace
- **Adventurers:** They live to go off the beaten track, spending time outdoors and trying out new experiences
- **Sightseers:** They prefer staying within comfort zone, preferring cities to countryside, planning in advance
- **Culture Buffs:** Image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations

Key findings



Key findings (1)

UK Trip Intentions

1. 70% of residents of the Republic of Ireland say they are likely to take a holiday or short break in the UK in the next few years.
2. Of these, nearly 3 in 5 (57%) are *very* likely to do so, slightly lower than the 62% that stated this in 2020.
3. Around half (52%) of this audience plan on taking their UK short break/holiday this year, with a further 31% planning on doing so next year (also lower than 2020). The lower short-term trip intention in 2022 will largely be due to research timing (this report being based on data collected in June compared to the 2020 report based on data collected in January). However, other data suggests the drop in intention may also be driven by circumstantial factors, such as ongoing concerns around COVID and the cost-of-living crisis.

UK Trip preferences

1. As in 2020, UK trip intenders are most likely to take a UK holiday/short break in a city or town, followed by a 'historic or heritage town' and 'scenic coastline or harbours'. With the exception of 'traditional seaside resorts', intention to take trips to most leading holiday types in the UK has dropped – potentially driven by a combination of seasonal factors, continued travel caution and growing financial concerns.
2. Destination influences have also changed since 2020 – most notably, 'great value for money' has risen by 19 percentage points and is now the second most important influence, and 'is easy to travel to and get around' is the number one most important. The dominance of these practical influences mark a change from 2020 when 'product-based' reasons (such as 'famous landmarks and visitor attractions' and 'a destination rich in history and heritage') were most dominant.
3. 'Trying local food and drink' is the leading anticipated experience on a UK holiday/short break, followed by 'visiting friends or family' and 'visiting outdoor attractions'. Consistent with previous findings in this report, 'attractions' and 'heritage and culture' are less appealing to UK trip intenders than in 2020.

Key findings (2)

Destination relationships and associations

1. Consistent with 2020, almost half (47%) of UK trip intenders have previously been on a short break or holiday in Wales, the lowest of each of the UK nations – England highest at 88%, followed by Northern Ireland (74%) and Scotland (57%). Positively however, there is latent demand for a Wales trip – 34% of UK trip intenders having never been but interested in doing so.
2. Familiarity with UK destinations correlates with previous visits – Wales being the UK nation with the lowest familiarity, slightly behind Scotland, and significantly behind Northern Ireland and England. Within Wales, familiarity is highest with Cardiff – Snowdonia, significantly behind.
3. England is the number one most recommended destination for a UK holiday/short break within the UK, with Wales a ‘distant 4th’ – 9% stating Wales, compared to 39% England, 25% Scotland and 25% Northern Ireland. Destination recommendation levels demonstrate that the appeal of a destination does not necessarily correlate with familiarity. For example, Wales and Scotland have relatively similar familiarity levels, but Scotland consistently scores significantly higher on recommendation and other brand associations.
4. In terms of destination types, Wales is most likely to be associated with ‘scenic countryside and villages’, ‘mountain adventure’, ‘a touring holiday’ and ‘scenic coastline and harbours’.
5. Wales has lower associations with ‘cities and large towns and relatively low association with historic and heritage towns – two ‘high preference destination types’.
6. With regards destination *influences*, Wales is most associated with ‘incredible scenery and landscapes’, followed by having ‘great places to explore off the beaten track’ and ‘quiet places without crowds of people’ – each of which have relatively high importance amongst UK trip intenders.
7. Wales has lower associations for a number of lower priority influences however – in particular for ‘is easy to travel to and get around’, ‘high quality accommodation’, ‘great value for money’, ‘places renowned for their food and drink’ and a ‘thriving culture and entertainment scene’.
8. In relation to experiences, Wales has the highest associations with ‘walking, hiking or rambling’, ‘exploring scenic areas by car’ and ‘learning about local history and culture’ – each of which are ‘high importance experiences’.
9. Wales has lower associations with a range of experiences that are of mid-level interest on holiday including ‘speciality shopping’, ‘attending live music/festivals’, ‘experiencing nightlife’ ‘health and wellbeing experiences’ and ‘visiting locations featured in TV, film or literature’.
10. In terms of ‘feelings’, Wales is most likely to be associated with relaxation, discovery and adventure – least likely to be associated with romance, excitement and surprise.

Key findings (3)

Future visits to Wales in the next 12 months

1. 1 in 9 (11%) UK trip intenders state they are definitely intending to take a Wales trip in the next 12 months, with a further 1 in 5 (21%) stating they will probably visit.
2. Pre-nesters and families are the life stages most likely to be 'definitely intending' to take a Wales holiday/short break in the next 12 months – about 1 in 6 intending to do so
3. Wales trip intenders are most likely to be planning their Wales trip in September, with July to August the most preferred time period more generally.
4. Aligned with 'great value for money' rising in importance as a destination influence, financial factors are a leading reason for half of UK intenders not visiting Wales for a holiday or short break in the next 12 months– 'the cost of fuel' and the 'rising costs of holidays/leisure', the leading two reasons, with 'personal finances' the fourth.
5. COVID-19 also remains a barrier, 18% nervous about travelling due to the virus and 15% concerned about catching or spreading it – amounting to 28% at a net level.

Visiting Wales out of season

1. Almost half (45%) of UK trip intenders state they are 'very open' to the idea of a holiday/short break in Wales outside of the summer season (between September and April). Interest is strongest in the Spring and Autumn months, and lowest in January and February – although this broadly replicates known trip-taking patterns.
2. The top three reasons for the appeal of an out of season Wales trip are 'accommodation is cheaper' (66%), 'prefer the peace and quiet' (53%) and 'fewer people at destinations' (51%).
3. Those who are *not* open to visiting Wales out of season are most likely to be put off by the weather at that time of year – almost half stating this, followed by 'shorter days and nights'. A third of families cite 'fewer school holidays' as a barrier.
4. 'Scenic countryside and villages' is the destination type UK trip intenders would be most interested in visiting in Wales out of season, followed by 'cities and large towns' and 'historic and heritage towns'.
5. The experiences that are regarded as most interesting on a Wales out of season holiday/short break are relatively consistent with 'general experience preferences' on a UK holiday/short break – 'trying local food and drink', 'visiting heritage sites or cultural attractions', 'learning about local history and culture' and 'exploring scenic areas by car' the highest preference.

Key findings (4)

6. There is a high level of interest in attending festivals on a Wales out of season trip – ‘food and drink festivals’ the most appealing followed by ‘live spectator sports’ and ‘live music festivals or concerts’
7. Out of season trips are most likely to be spent with a partner, staying in a hotel and visiting Cardiff. Trips are more likely to be short breaks, rising to longer breaks of 4+ nights for retirees. There is interest in long weekends as well as mid week breaks.

Understanding Attitudes to Sustainability

1. UK intenders planning a trip to Wales index above average on ‘Affluent Hedonists’ – a segment that signals interest in green issues, but prioritises experiences (43% compared to 25% on average).
2. There are a wide range of sustainable actions that UK trip intenders believe tourism businesses and visitors should prioritise. ‘Opportunities for recycling or reducing waste’, ‘proactively supporting the local area’, a ‘reduction of single use plastic and a ‘commitment to sourcing or buying local produce’ are the top priorities the.
3. The sustainable actions that UK trip intenders are most likely to ‘already do’ or ‘would seriously consider doing are ‘travelling off-peak instead of the peak season’, ‘using public transport’ and ‘prioritising buying from local food and drink producers’

Demographics of UK trip intenders



Gender and life stage of UK trip intenders

- The gender split of UK trip intenders is relatively balanced, with 'families' the largest life stage, followed by 'older independents'.
- 'Pre-nesters' (18%) and 'retirees' (17%) are the smallest life-stages amongst UK trip intenders.

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

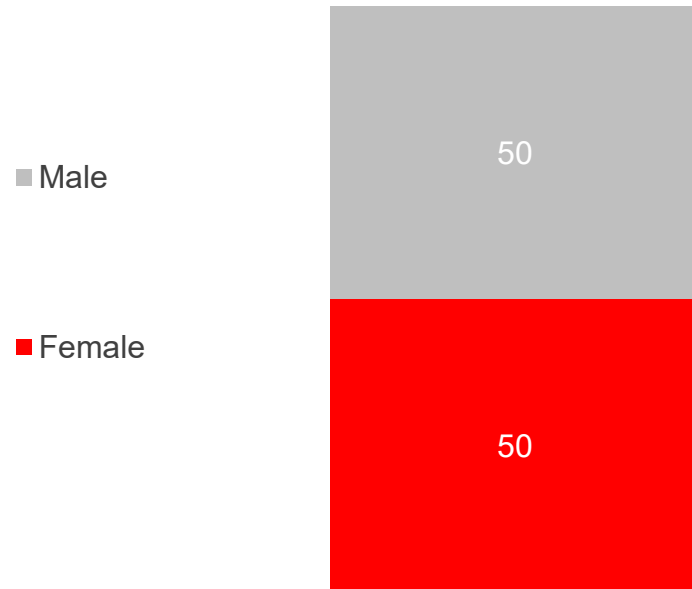
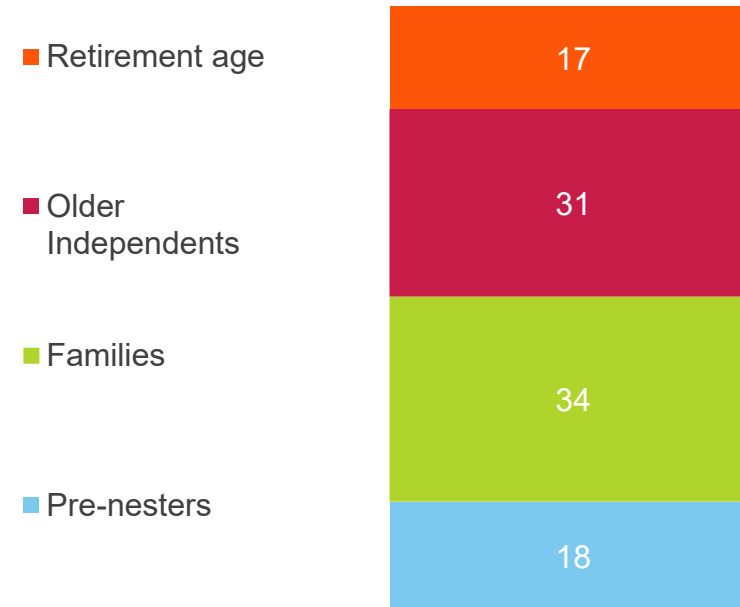


Figure 2. Life stage of respondents, Percentage, All respondents



Employment status and social grade of UK trip intenders

- Half of UK trip intenders are in full-time employment, with a further 17% employed part-time, and 16% retired. The majority (62%) fall into social grades ABC1.
- Compared to 2020, UK trip intenders are more likely to be in full-time employment and belong to higher social grades.

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

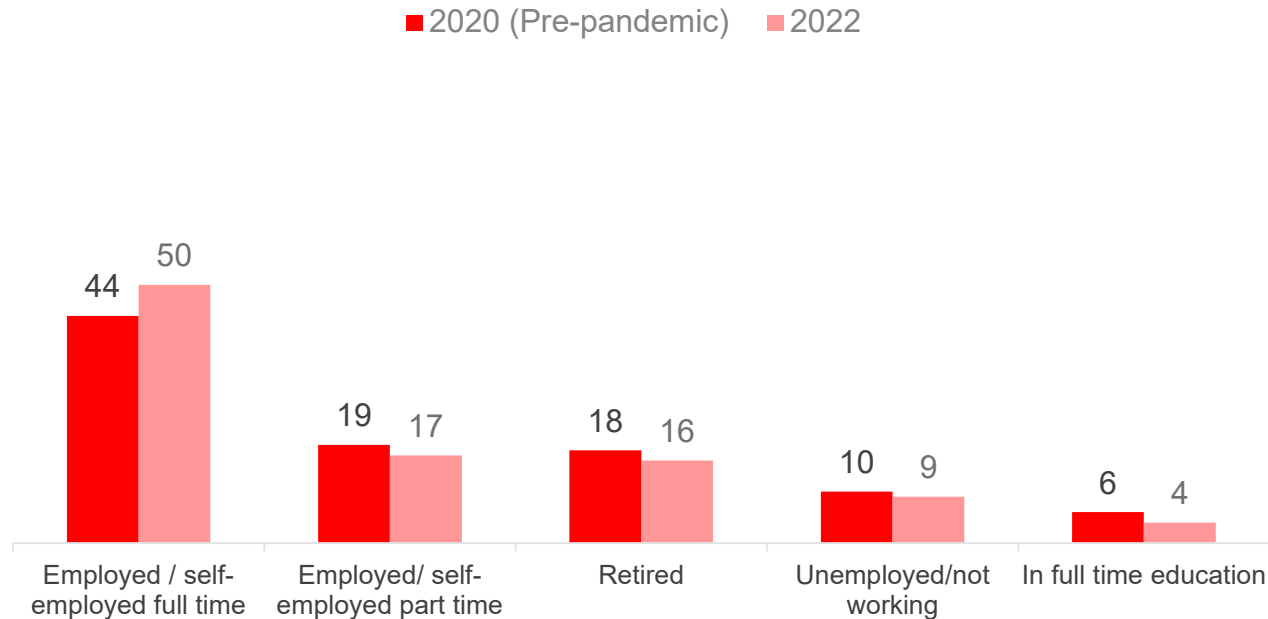
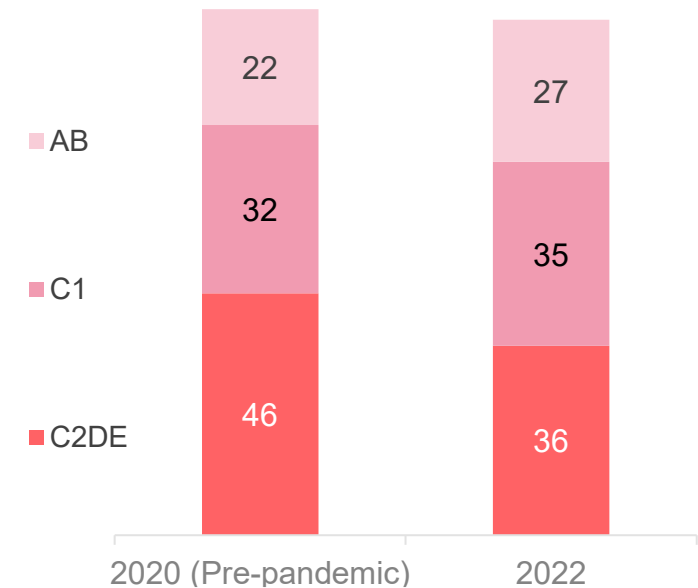


Figure 4. Social grade of respondents (weighted), Percentage, All respondents



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

Base: All respondents n=604

Attitude to ‘cost of living crisis’ and fall-out of Visit Wales segments

- Three quarters (75%) of UK trip intenders have either been ‘hit hard’ by the cost of living crisis so far, or ‘are ok but have to be careful’ (driven predominantly by the latter), reflecting caution about personal finances and a potential impact on trip-taking behaviour.
- UK trip intenders are more likely to belong to the ‘buzzseeker’ segment and less likely to be ‘sightseers’ than in 2020. ‘Adventurers’ and ‘Explorers’ also make up a substantial proportion of potential UK visitors.

Figure 5. Impact of cost of living crisis so far, Percentage, All respondents

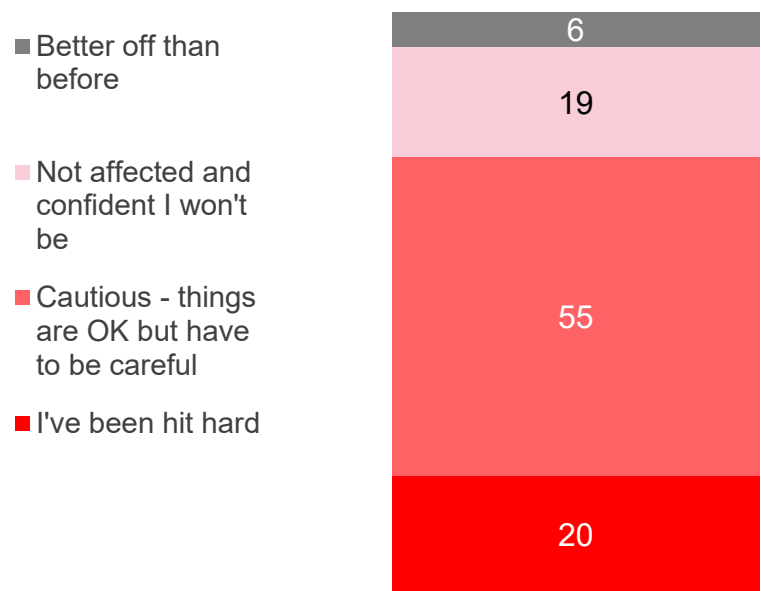
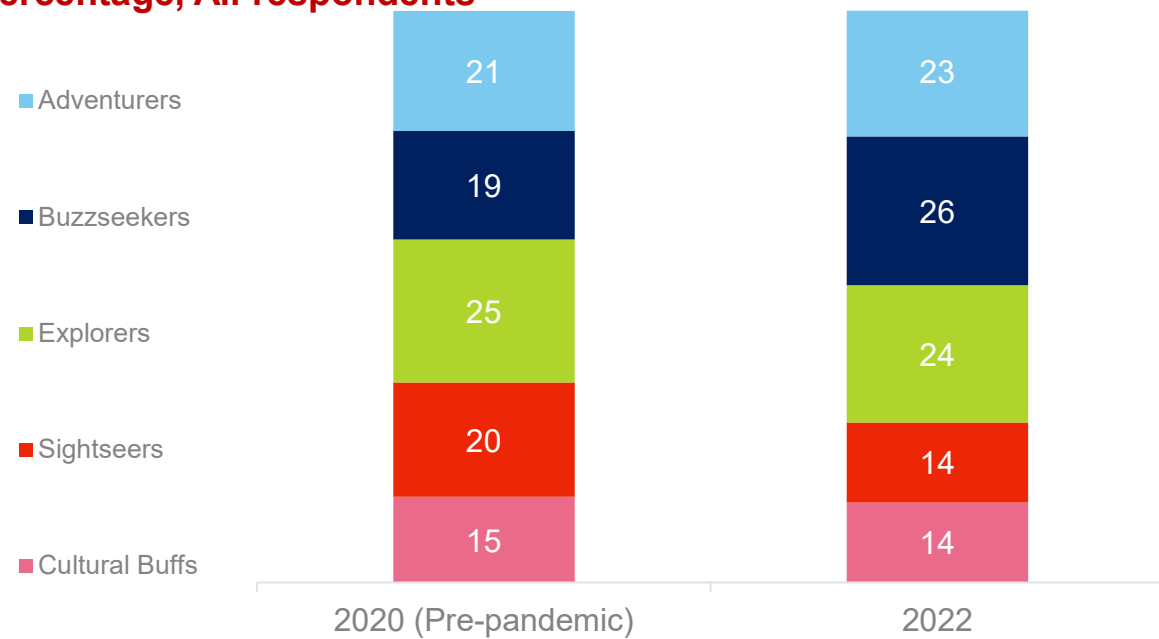


Figure 6. Visit Wales Segment of respondents, Percentage, All respondents



X4c. There has been a lot of talk about how the ‘cost of living crisis’ has affected people’s financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents n=604



Region of residence and relationship with Wales

- In terms of region of residence, UK trip intenders are split along population lines, with around 3 in 10 living in each of Dublin, Leinster and Munster, and nearly 1 in 5 living in Connaught-Ulster
- 16% of UK trip intenders have ties to Wales of some sort, 'having family and friends who live there', the most dominant with 9% falling into this category.

Figure 7. Region of origin of respondents (weighted), Net Percentage, All respondents

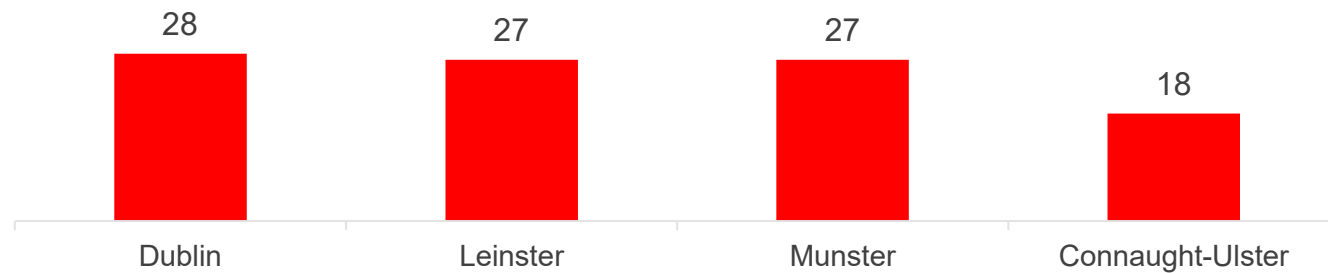
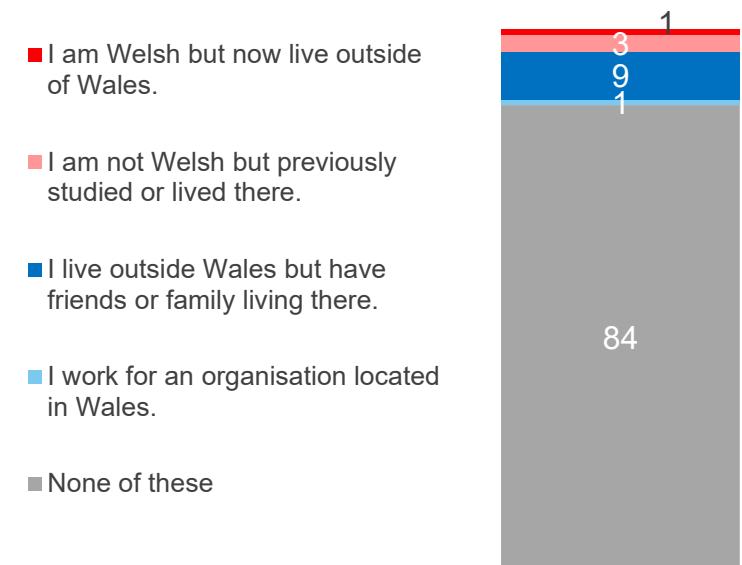


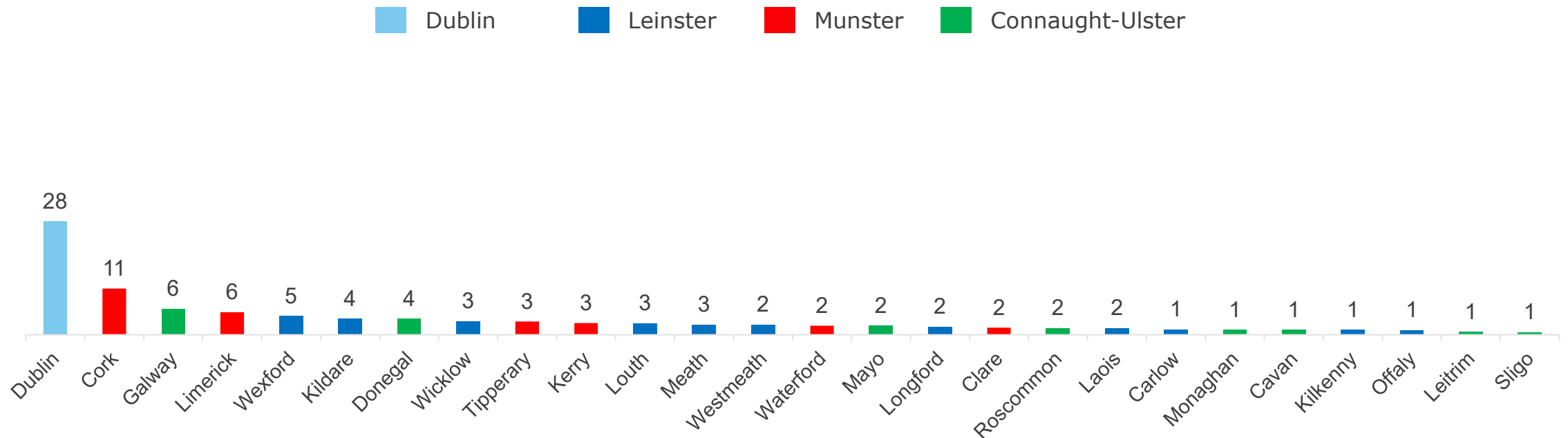
Figure 8. Relationship with Wales, Percentage, All respondents



Region of residence – FULL LIST

- On a more granular level, Dublin, Cork, Galway and Limerick are the four parts of Ireland with the highest proportion of UK trip intenders – making up over half between them.

Figure 9. Region of origin of respondents (weighted), Net Percentage FULL LIST, All respondents



Demographics questions. X9. Which, if any, of the following apply to you?

Base: All respondents n=604

Trip preferences



UK holiday/short break intention in the next few years

- Around 3 in 5 (57%) UK trip intenders are 'very likely' to take a UK holiday/short break in the next few years – slightly below the 2020 figure.
- Around half (52%) of this audience plan on taking their UK short break/holiday this year, significantly lower than 2020 when the research was conducted in January. Whilst a drop in near-term intention will be driven by research timing, other factors (such as cost of living and ongoing COVID caution) are also likely to be playing a role. Positively, however, with a third (34%) not yet having booked their trip this year, and a further 3 in 10 planning to visit the UK next year, there is strong latent demand.

Figure 10. Likelihood of taking a UK short break in the next few years, Percentage, All respondents

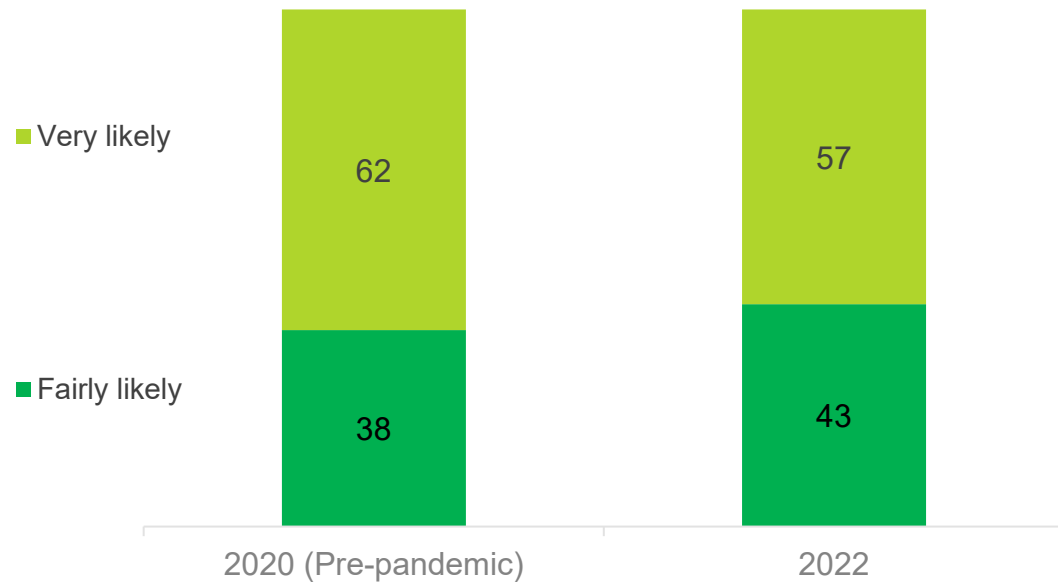
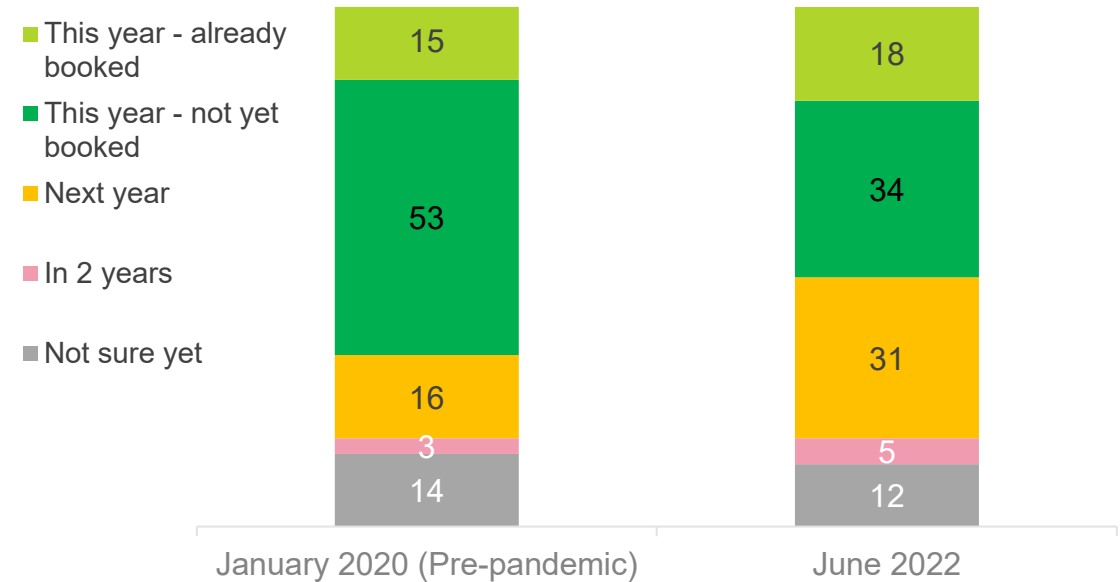


Figure 11. Next UK short break/holiday, Percentage, All respondents



IRE-S7. How likely or unlikely are you to take a holiday or short break in the UK in the next few years?

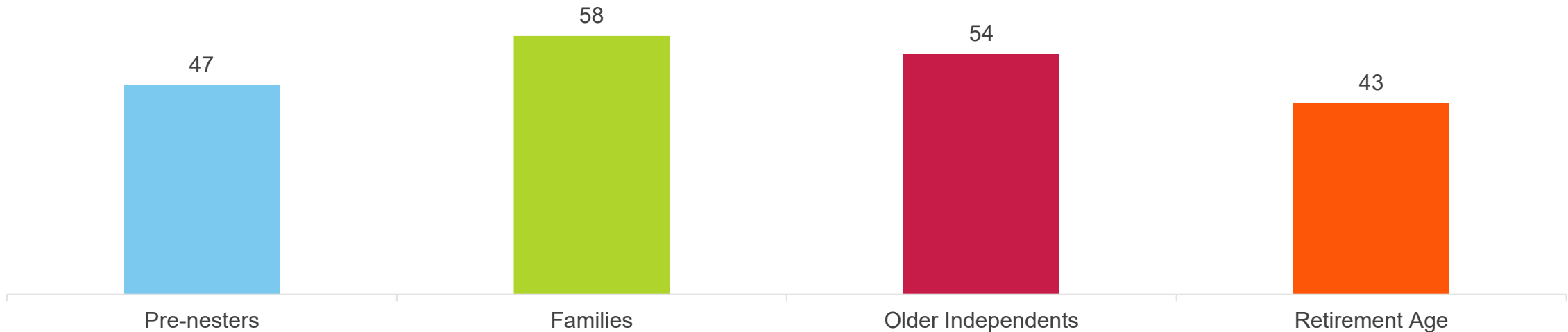
IRE-S8. In which year are you likely to take your next holiday or short break in the UK?

Base: All respondents n=604

Next UK short break/holiday – by life stage

- Families show the highest likelihood of taking a UK holiday or short break this year, followed closely by older independents. Retirees are the least likely.

Figure 12. Next UK short break/holiday this year by life stage, Percentage, All respondents



IRE-S8. In which year are you likely to take your next holiday or short break in the UK?
Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104

Trips intended to UK in next 12 months – by segment and region

- UK trip intenders living in Connaught-Ulster and Munster exhibit the highest likelihood of a UK holiday or short break this year.
- Adventurers and Buzzseekers are the segments most likely to take a UK trip – Explorers and Sightseers the least likely to.

Figure 13. Next UK short break/holiday this year by region of residence, Percentage, All respondents

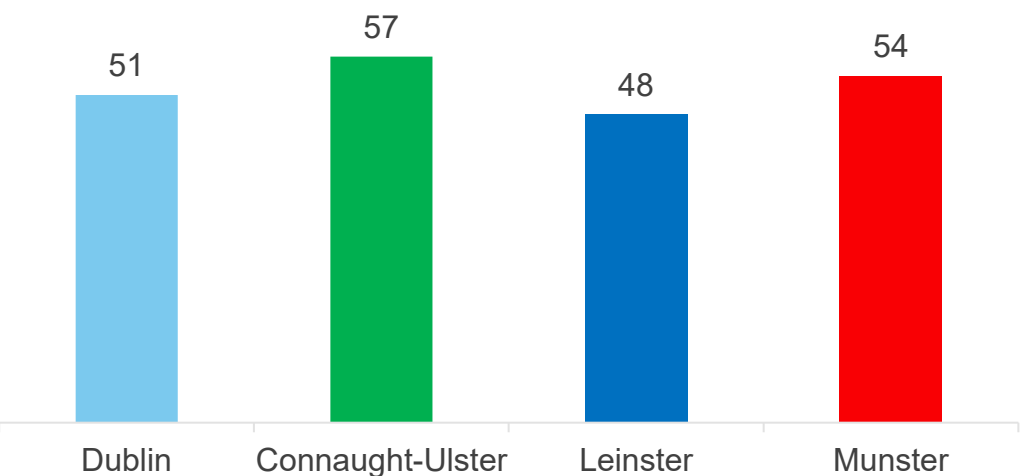
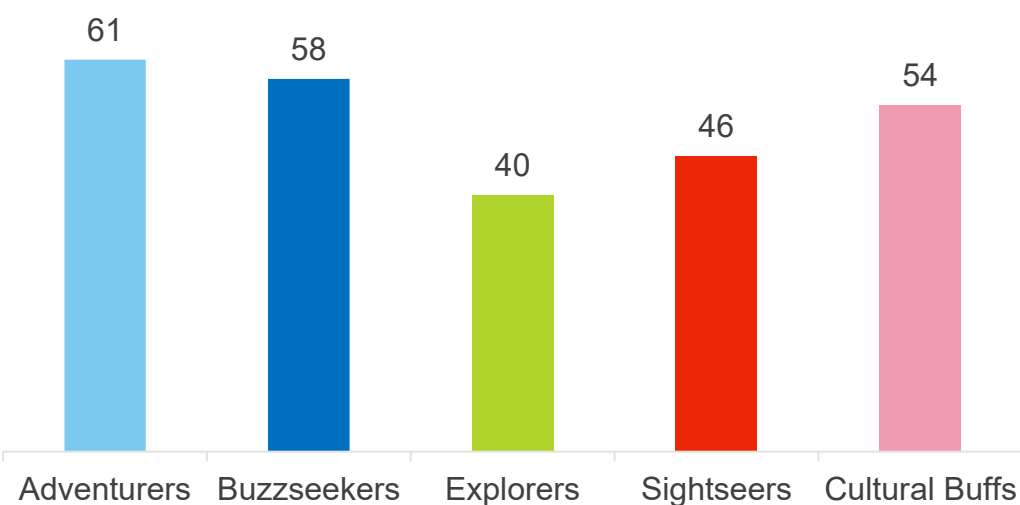


Figure 14. Next UK short break/holiday this year by segment, Percentage, All respondents

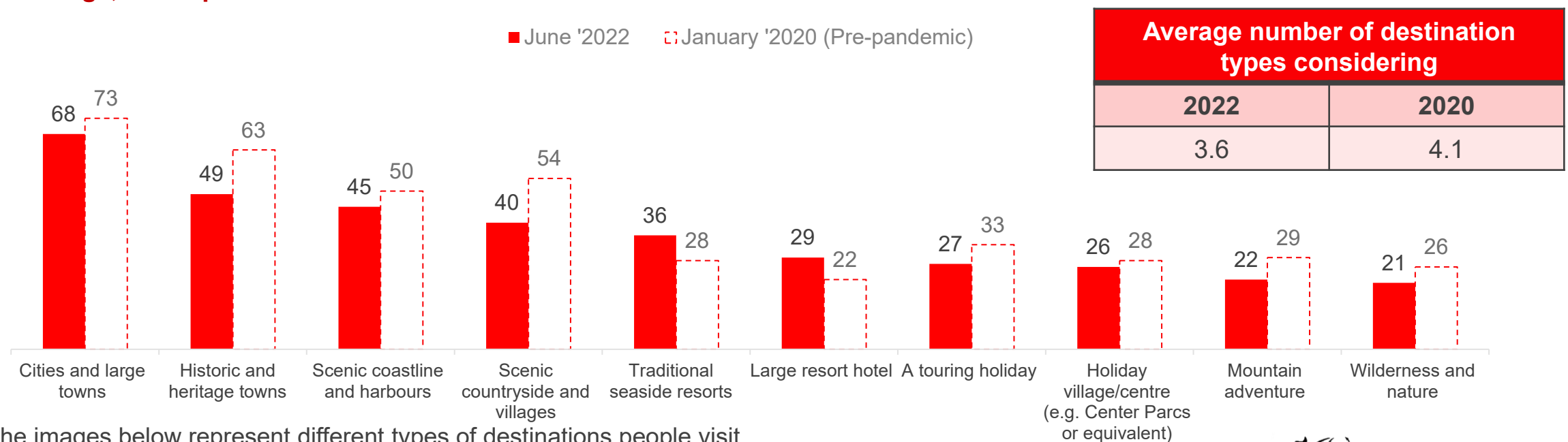


IRE-S8. In which year are you likely to take your next holiday or short break in the UK?
Base: Dublin n=168; Connaught-Ulster n=105; Leinster n=163; Munster n=168; Adventurers n=136; Buzzseekers n=155; Explorers n=143; Sightseers n=85; Cultural Buffs n=85

Destination types seriously considering for a UK overnight trip*

- Similar to 2020, 'cities and large towns' are the most popular type of holidays/shorts breaks in the UK with over 2 in 3 (68%) selecting them as one of the destinations they would seriously consider in the next few years. 'Historic and heritage towns', 'scenic coastlines and harbours' and 'scenic countryside and villages' are the next most popular destination types, although each with lower preference than in 2020. UK trip intenders are seriously considering nearly four destination types on average.
- Differences with 2020 may be driven by seasonal factors, lower interest in a UK trip or other factors such as travel caution due to COVID and growing 'financial concerns'.

Figure 15. Destination types seriously considering a UK holiday/short break in next few years, Percentage, All respondents



B1. The images below represent different types of destinations people visit.

To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years?

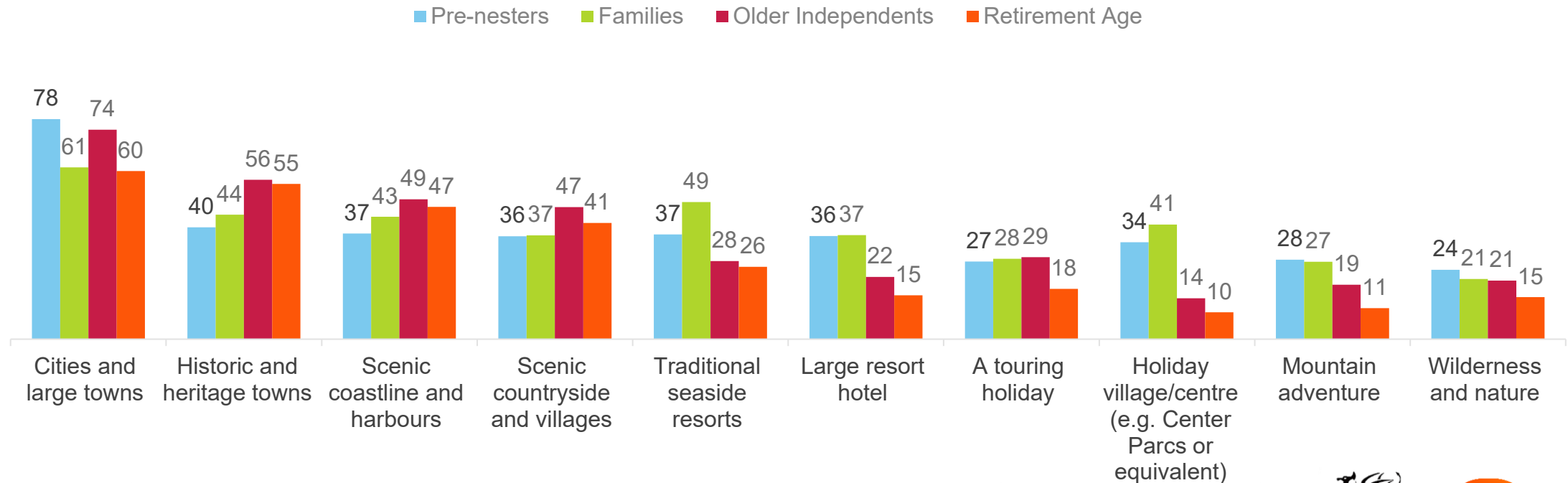
Base: All respondents n=604

*Note: Differences with 2020 may be seasonal with summer destination types being more front of mind in the later 2022 research

Destination types seriously considering – by life stage

- There is some variation in UK destination type preference by life stage. 'Cities and large towns' is the leading destination type for all life stages, although more so for 'pre-nesters' and 'older independents'. Families index highest for 'traditional seaside resorts' and 'holiday villages/centres', whilst 'older life stages' such as 'older independents' and 'retirees' index higher for 'historic and heritage towns', 'scenic coastline and harbours' and 'scenic countryside and villages'.

Figure 16. Destination types seriously considering a UK holiday/short break in next few years, Percentage, All respondents



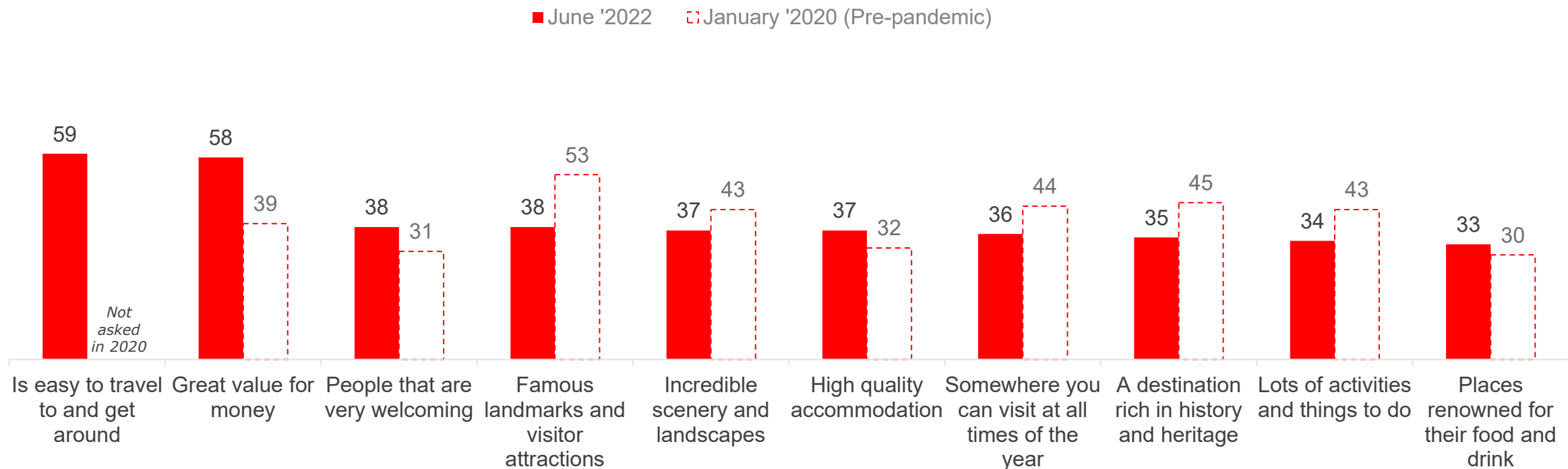
B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next few years?

Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104

Destination influences for a UK overnight trip*

- 'Is easy to travel and get around' is the leading destination influence for a UK holiday/short break, followed by 'great value for money' – the latter having increased significantly in importance since 2020. 'People that are very welcoming' is the third most important influence, and has also increased since 2020. Notably, 'high quality accommodation' has also increased as an influence.
- Influences relating to visitor attractions, heritage and history have all declined significantly since 2020.

Figure 17. Destination influences for a UK holiday/short break, Percentage, Top 10, All respondents



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

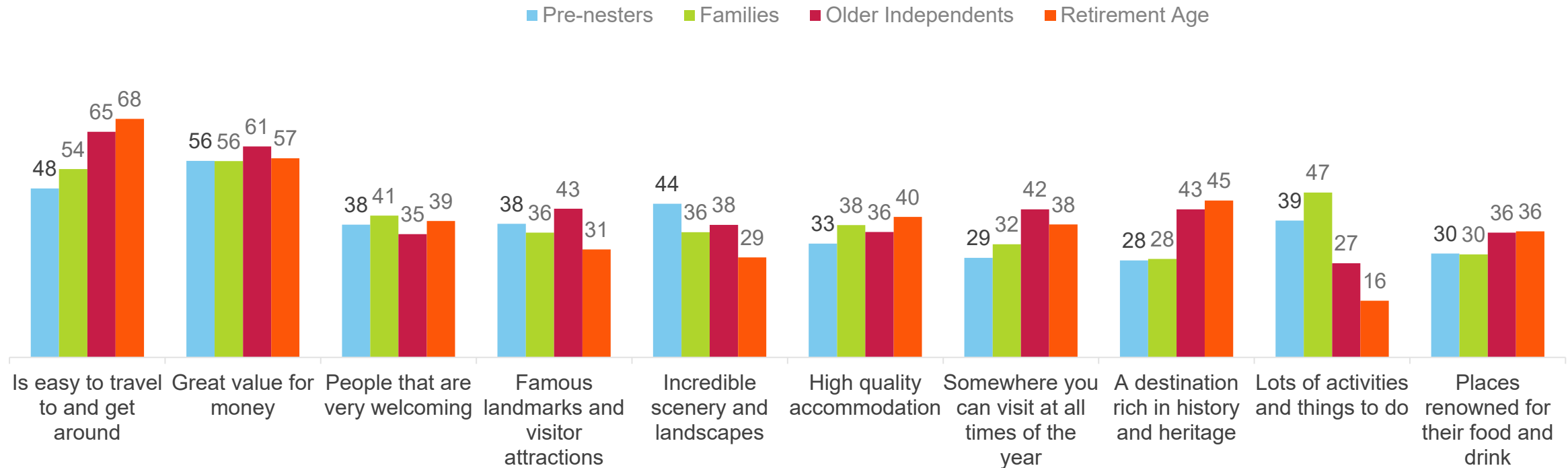
Base: All respondents n=604

*Differences with 2020 may in part be driven by the increasing number of options available on the question

Destination influences for a UK overnight trip – by life stage

- 'Great value for money' is an important destination influence for all life stages, but other influences differ. Older life stages are most likely to prioritise 'ease of travel to the destination', history and heritage, and food and drink, with families and younger life stages indexing higher on 'things to do'.

Figure 18. Destination influences for a UK holiday/short break by life stage, Percentage, Top 10, All respondents



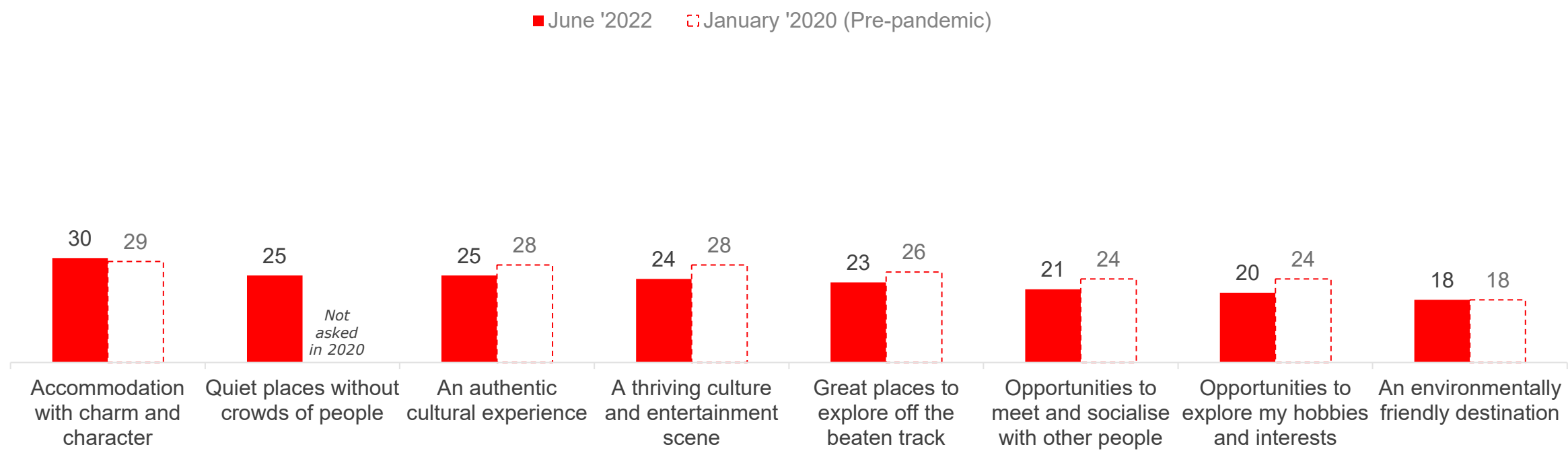
B2. Below are a list of influences people have given for choosing their holidays and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104

Destination influences for a UK overnight trip

- A range of other destination influences are important, although ‘opportunities to explore my hobbies and interests’ and ‘an environmentally friendly destination’ are bottom of the list.

Figure 19. Destination influences for a UK holiday/short break, Percentage, Bottom 8, All respondents



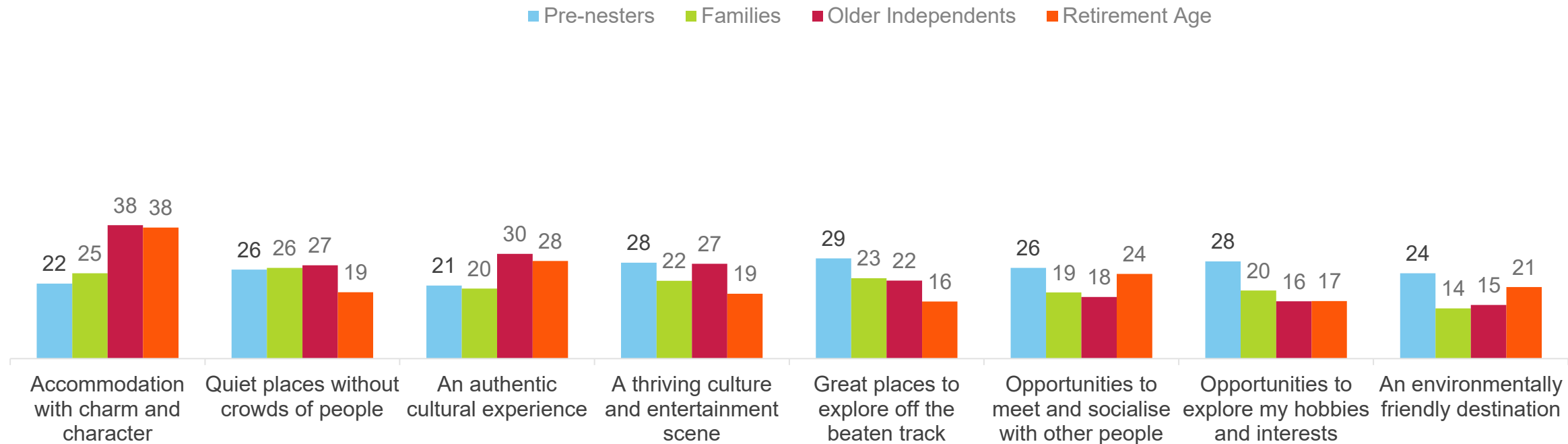
B2. Below are a list of influences people have given for choosing their holidays and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?
Base: All respondents n=604



Destination influences for a UK overnight trip – by life stage

- ‘Accommodation with charm and character’ and ‘an authentic cultural experience’ are two other destination influences that index higher amongst older independents and retirees, with ‘pre-nesters’ most likely to favour ‘a thriving culture and entertainment scene’, ‘great places to explore off the beaten track’, ‘opportunities to socialise’, ‘opportunities to explore hobbies’ and ‘an environmentally friendly destination’.

Figure 20. Destination influences for a UK holiday/short break, Percentage, Bottom 8, All respondents



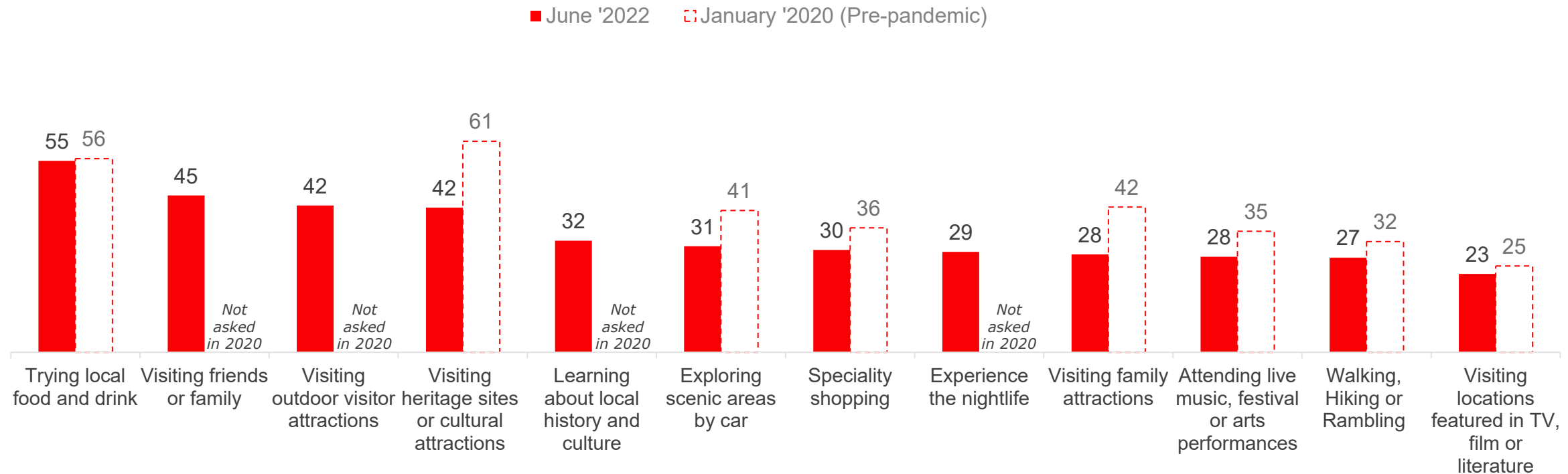
B2. Below are a list of influences people have given for choosing their holidays and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104

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

- In terms of experiences, 'trying local food and drink' is what UK intenders would most like to do (interest very similar to 2020), followed by 'visiting friends and family' and 'visiting outdoor visitor attractions'.
- Consistent with previous findings in this report, 'attractions', 'heritage and culture' and 'exploring scenic areas by car' appear to be less appealing to UK intenders than in 2020.

Figure 21. Experiences would most like to do on a UK holiday/short break, Percentage, Top 12, All respondents



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

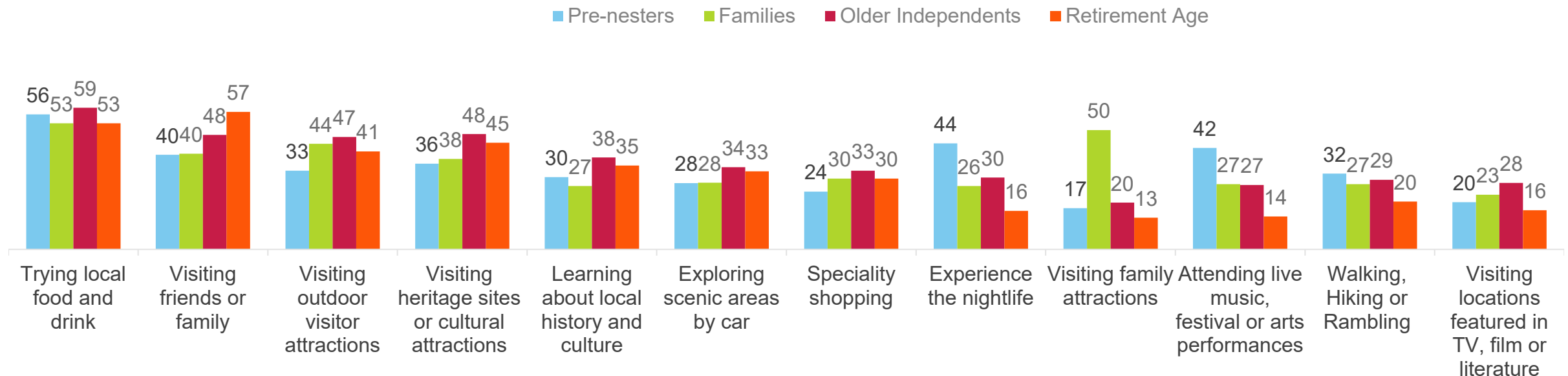
Base: All respondents n=604

*Note: Differences with 2020 may be seasonal with summer activities being more front of mind in the later 2022 research. Differences may also be driven by the longer list in 2022 – artificially deflating responses

Experiences would most like to do – by life stage

- There are some differences in the leading preferred experiences by life stage. Retirees index highest on visiting friends or family, with older life stages generally indexing higher for culture and heritage experiences.
- Unsurprisingly, families are the most likely to be interested in ‘visiting family attractions’. Pre-nesters are the most likely to be interested in ‘experiencing nightlife’ and ‘attending music, festivals or arts performances’

Figure 22. Experiences would most like to do on a UK holiday/short break by life stage, Percentage, Top 12, All respondents



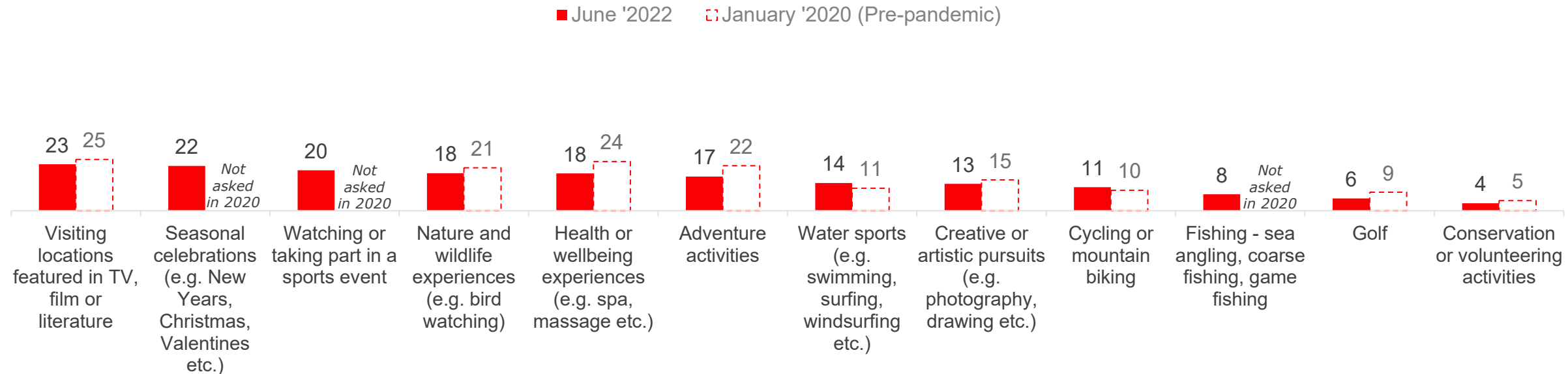
B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next few years?

Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104

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

- Activities such as 'visiting locations featured in TV, film or literature' and 'seasonal celebrations' are appealing for around 1 in 4 UK trip intenders. 'Watching a sports event' is appealing for 1 in 5. Specific outdoor experience like 'adventure activities', 'water sports', 'cycling', 'fishing' and 'golf' are likely to be undertaken by a minority of UK intenders.
- 'Conservation or volunteering activities' is what UK trip intenders would *least* like to do on their UK trip.

Figure 23. Experiences would most like to do on a UK holiday/short break, Percentage, Bottom 11, All respondents



And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years?

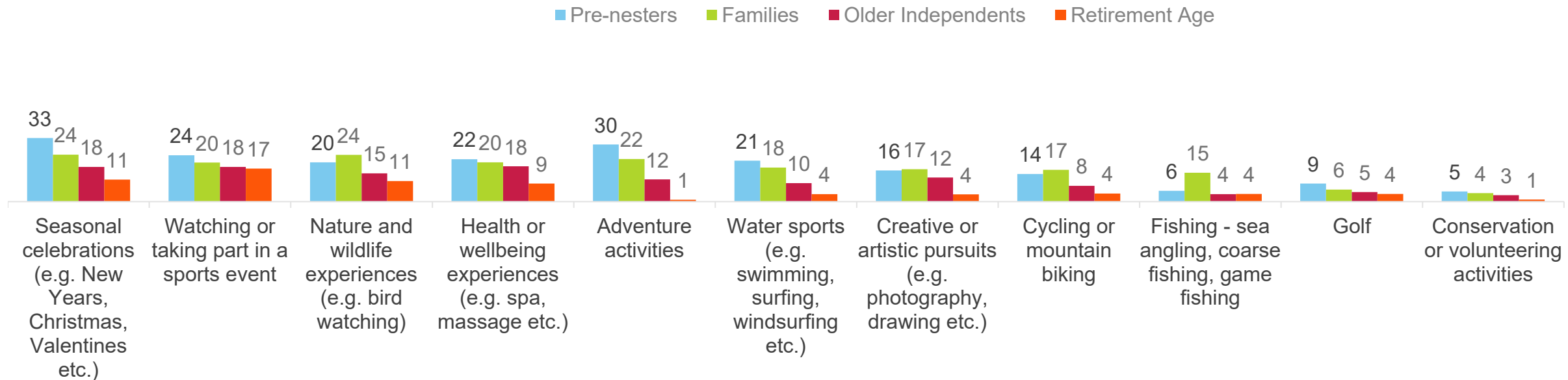
Base: All respondents n=604

*Note: Differences with 2020 may be seasonal with summer activities being more front of mind in the later 2022 research. Differences may also be driven by the longer list in 2022 – artificially deflating responses

Experiences would most like to do – by life stage

- Pre-nesters are the most likely to be interested in 'seasonal celebrations', 'watching/taking part in sports events', 'adventure activities', and 'water sports'. Families also show an interest in most of these experiences, and index highest for 'nature and wildlife experiences', 'creative or artistic pursuits', 'cycling or mountain biking' and 'fishing'.

Figure 24. Experiences would most like to do on a UK holiday/short break by life stage, Percentage, Top 12, All respondents



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

Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104

Destination relationships and previous visits

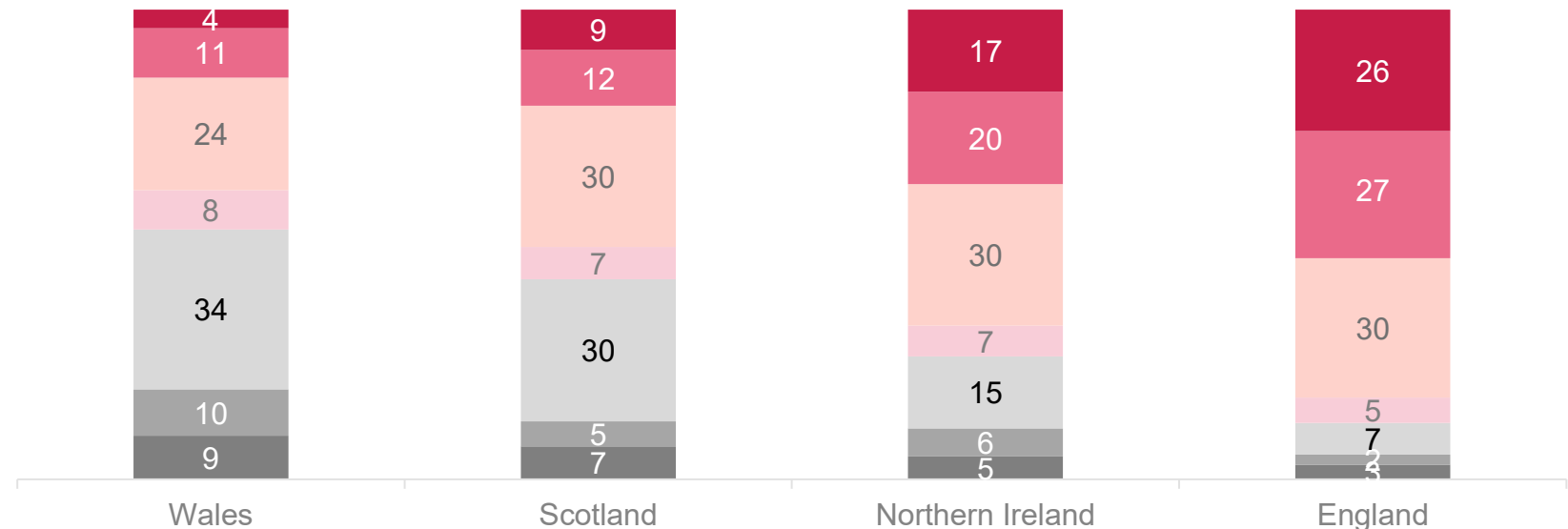


Destination relationships

- Consistent with 2020, almost half (47%) of UK trip intenders have been on a short break or holiday in Wales, the lowest of each of the UK nations – England highest at 88%, followed by Northern Ireland (74%) and Scotland (57%).
- Positively, 34% of UK trip intenders have never been to Wales for a holiday/short break but would like to – higher than any other nation.

Figure 25. Relationship with each destination, Percentage, All respondents

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



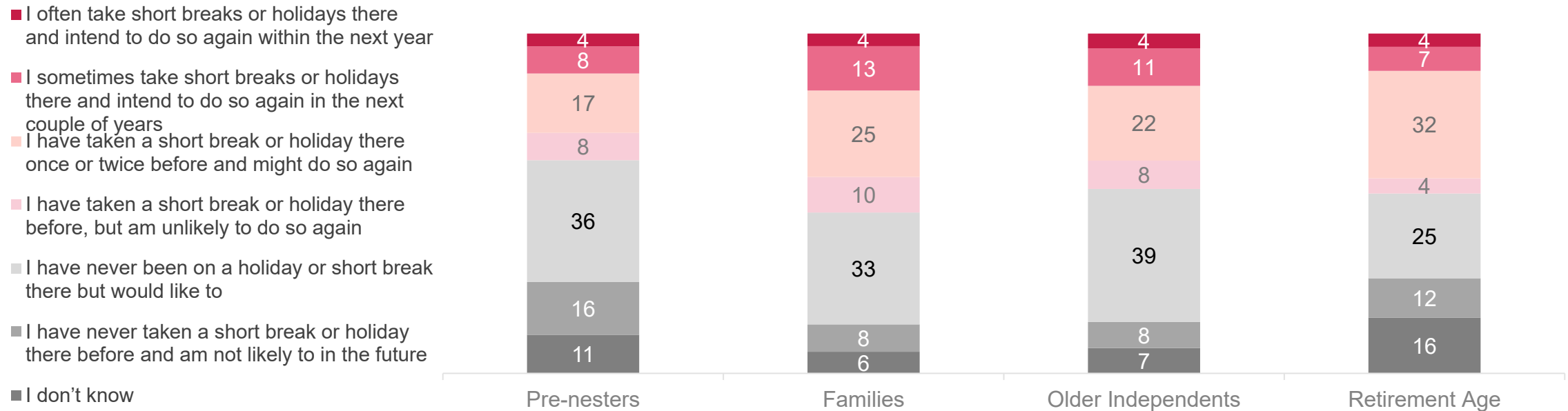
C3. And which of the following statements best applies to you when it comes to visiting these destinations?

Base: All respondents n=604

Loyalty with Wales by life stage

- Families report the strongest relationship with Wales as a holiday or short break destination – over half having taken a holiday or short break there, and 42% having taken a trip there and intending to do so again.
- Just under a half of retirees and older independents have taken a holiday or break in Wales and most of these would consider doing so again.
- Pre-nesters exhibit the weakest 'loyalty' with Wales, although over a third have never been and would like to, suggesting strong potential to convert to visits.

Figure 26. Relationship with Wales by life stage, Percentage, All respondents



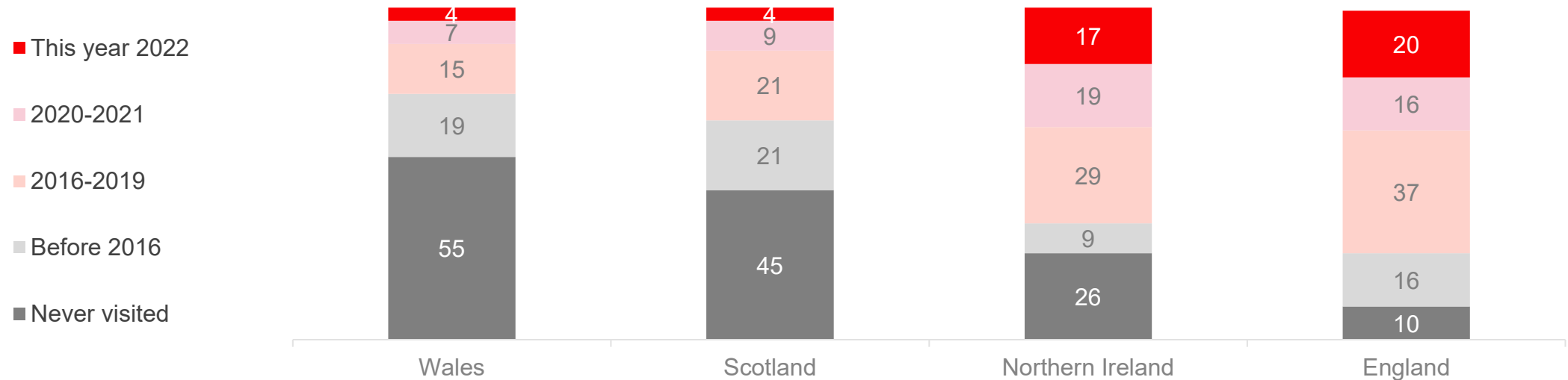
C3. And which of the following statements best applies to you when it comes to visiting these destinations?

Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104

Previous visits to each destination

- Consistent with 'destination loyalty', Wales has the lowest proportion of 'recent trips' (since 2020) from UK trip intenders – England and Northern Ireland with the most.
- There are some notable – if unsurprising – differences to 2020, likely driven by COVID-related travel restrictions and concerns. In 2020, England had attracted visits from 45% of UK intenders in the previous 2 years (compared to 36% in this survey), significantly ahead of Northern Ireland (which now sits at the same level for recent visits). Pandemic-related travel restrictions also mean that 'recent visits' to mainland Great Britain are lower than in 2020. Whilst these findings are to be expected, they do suggest a change in trip patterns and lower familiarity with Wales, Scotland and England compared to before the pandemic.

Figure 27. Previous visits to each destination, Percentage, All respondents



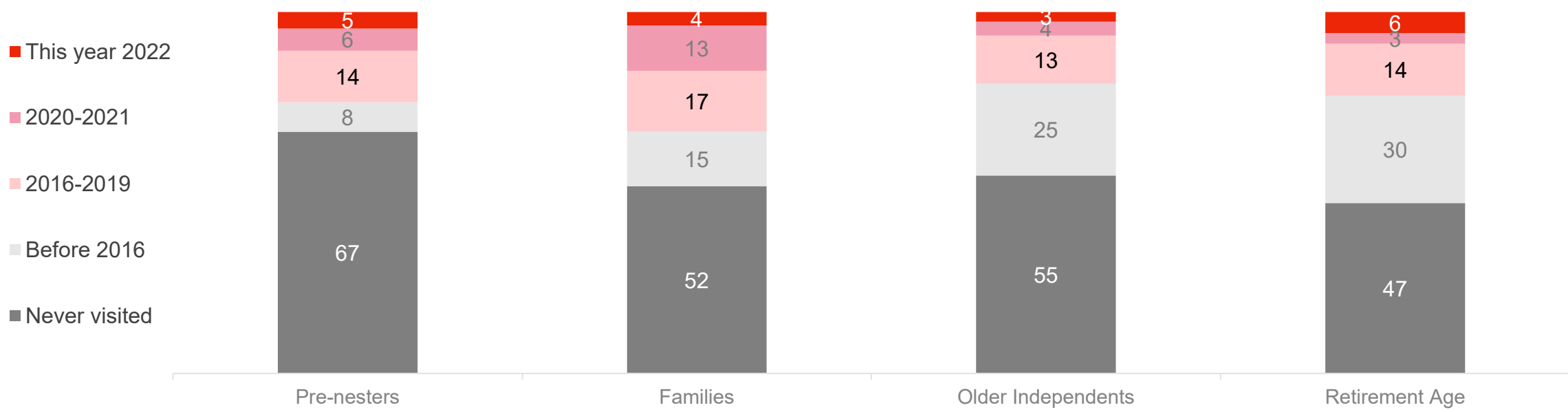
C4. When did you last visit these places for a holiday or short break?

Base: All respondents n=604

Previous visits to Wales by life stage

- Aligned with general loyalty to Wales as a destination, families are the life stage most likely to have taken a trip in Wales since 2020, 17% having done so. Retirees show a higher level of visitation overall, driven by higher proportions of visits before 2016 and likewise older independents are more likely to have last visited prior to 2016.

Figure 28. Previous visits to WALES by LIFE STAGE, Percentage, All respondents



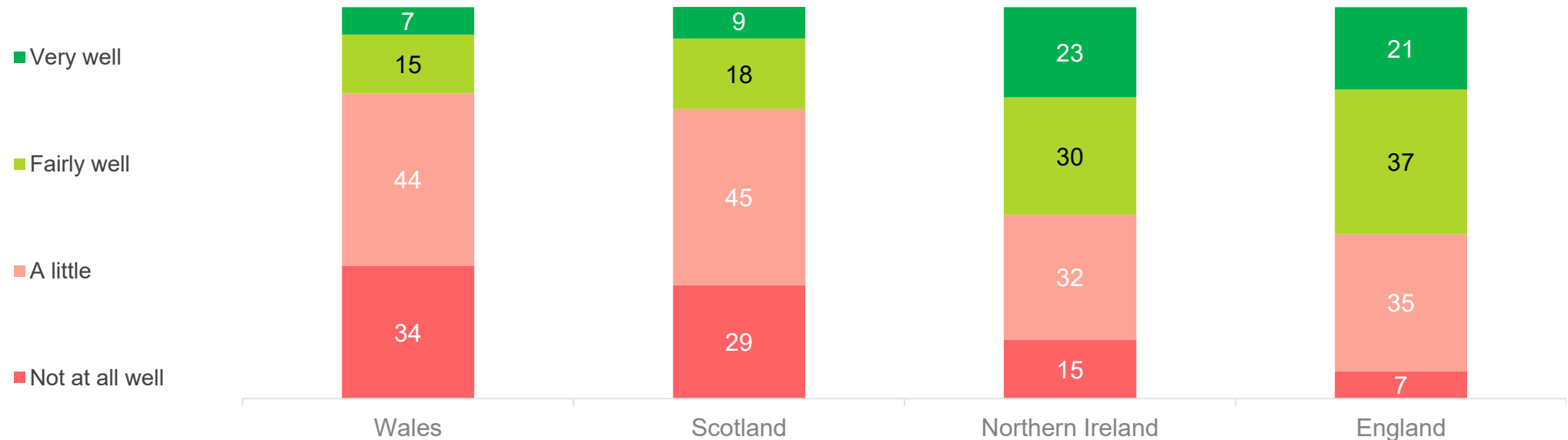
C3. And which of the following statements best applies to you when it comes to visiting these destinations?
C4. When did you last visit these places for a holiday or short break?
Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104



Level of familiarity with destinations

- England generates the highest levels of familiarity as a destination – 58% knowing it ‘very or fairly well’ – followed closely by Northern Ireland (53%).
- Consistent with 2020, familiarity with Wales is the lowest of each nation, only 22% knowing it very or fairly well (compared to 21% in 2020), with a third (34%) not knowing it at all well.

Figure 29. Level of familiarity with destinations, Percentage, All respondents



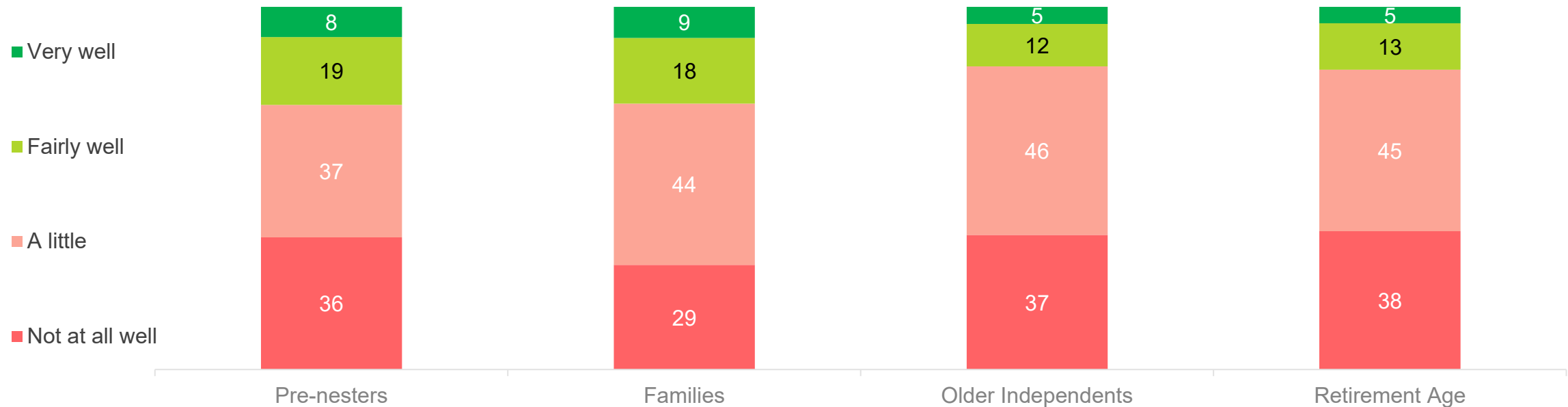
C1c . How well, if at all, do you know each of these parts of the UK?

Base: All respondents n=604

Destination familiarity with Wales by life stage

- Pre-nesters and families claim to know Wales the most well, although a large majority of each life stage state they only know Wales 'a little' or 'not at all well'.
- The level of knowledge of Wales by older independents and retirees is relatively low with fewer than 1 in 5 knowing Wales fairly or very well. This may reflect lower levels of recent visits by these groups.

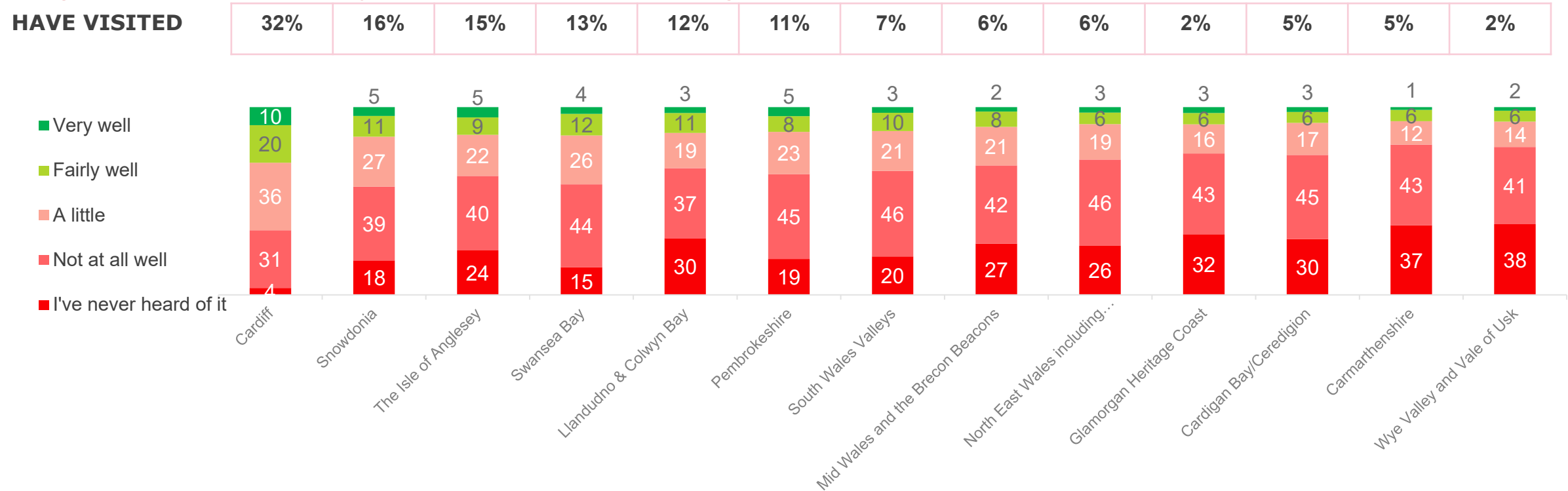
Figure 30. Level of familiarity with WALES by life stage, Percentage, All respondents



Level of familiarity with areas of Wales

- Cardiff generates the highest prompted familiarity of areas within Wales, followed by Snowdonia, and The Isle of Anglesey. Familiarity generally correlates with previous visits.
- Whilst around 1 in 3 have visited Cardiff previously, this is much lower for every other destination in Wales.

Figure 31. Level of familiarity with areas of Wales, Percentage, All respondents

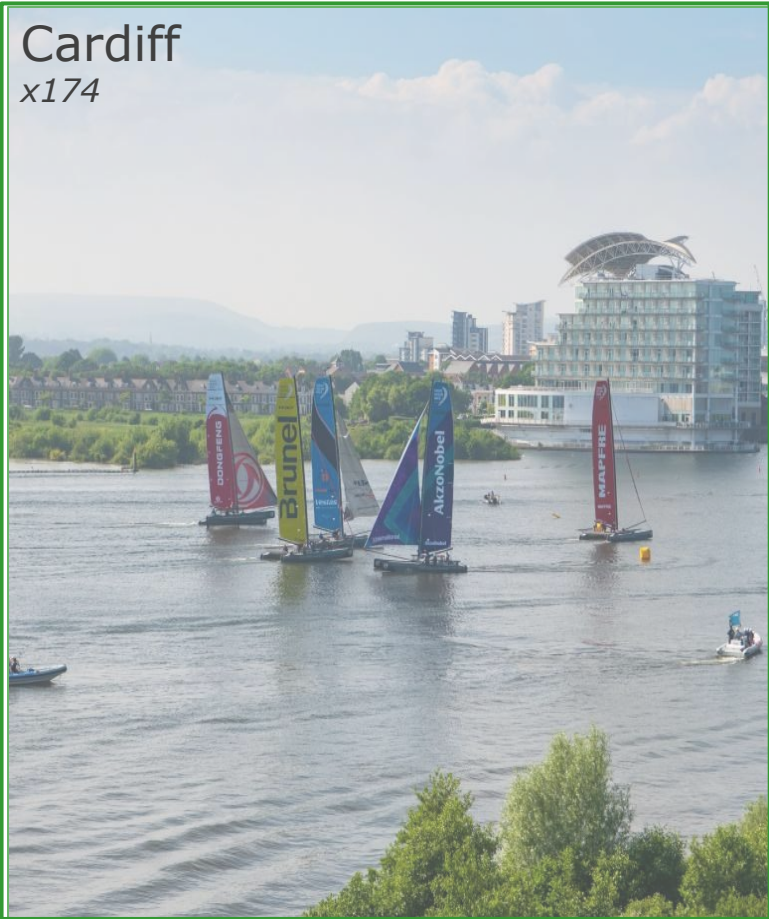


E2. How well, if at all, do you know the following areas of Wales?
E4. Which, if any, of these places in Wales have you ever visited for a holiday or short break?
Base: All respondents n=604



Common places associated with Wales

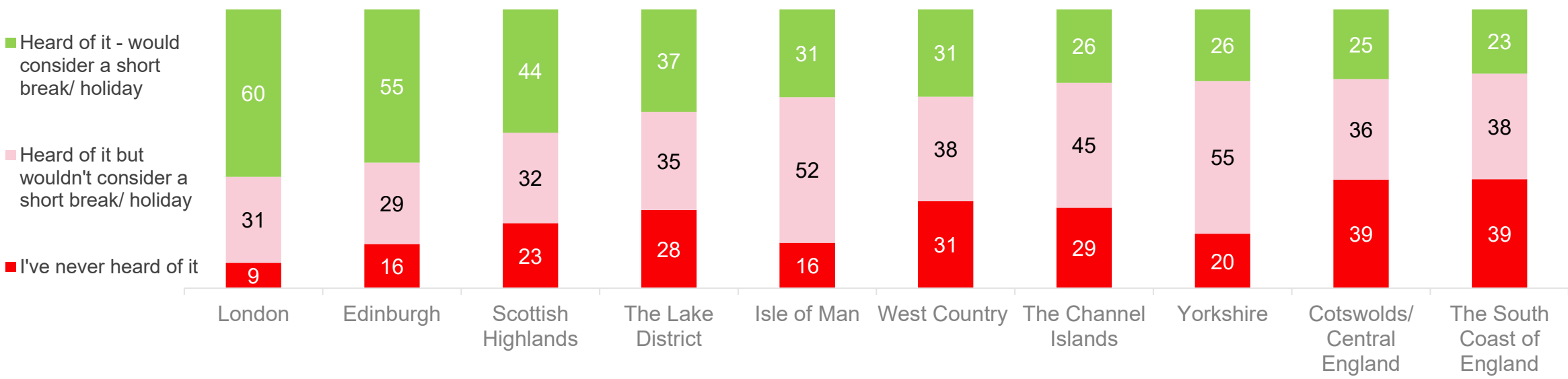
- Cardiff is also the highest *unprompted* place associated with Wales – more than eight times as mentioned as Snowdonia and Swansea.



Consideration of other destinations within the UK

- In terms of other destinations within the UK, holiday/short break consideration is highest for London and Edinburgh further underlining UK trip intenders' preference for cities and large towns.
- The Scottish Highlands and The Lake district are the next most preferred, also highlighting UK intenders' interest in scenic countryside and mountains.

Figure 32. Consideration of other destinations within the UK, Percentage, All respondents



IRE-D7 Finally in this section which, if any, of these places have you heard of in the UK?
IRE-D8 To which would you seriously consider going to for a short break or holiday?
Base: All respondents n=604



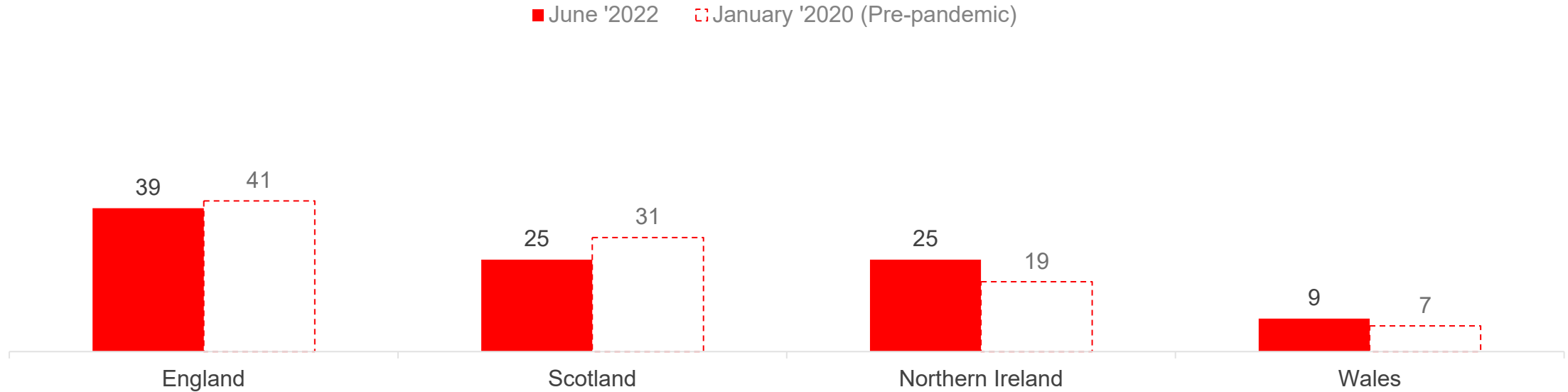
Destination associations and preferences



Number one most recommended destination

- Consistent with 2020, England is the most recommended destination for a UK holiday/short break amongst UK trip intenders, with Wales in a distant 4th – 16 percentage points behind Scotland and Northern Ireland in joint 2nd.

Figure 33. Number one most recommended destination, Percentage, All respondents



D1a. We'd like you to imagine that a friend who has never been to the places listed below has asked your advice on which one to choose for a holiday or short break in the next few years.

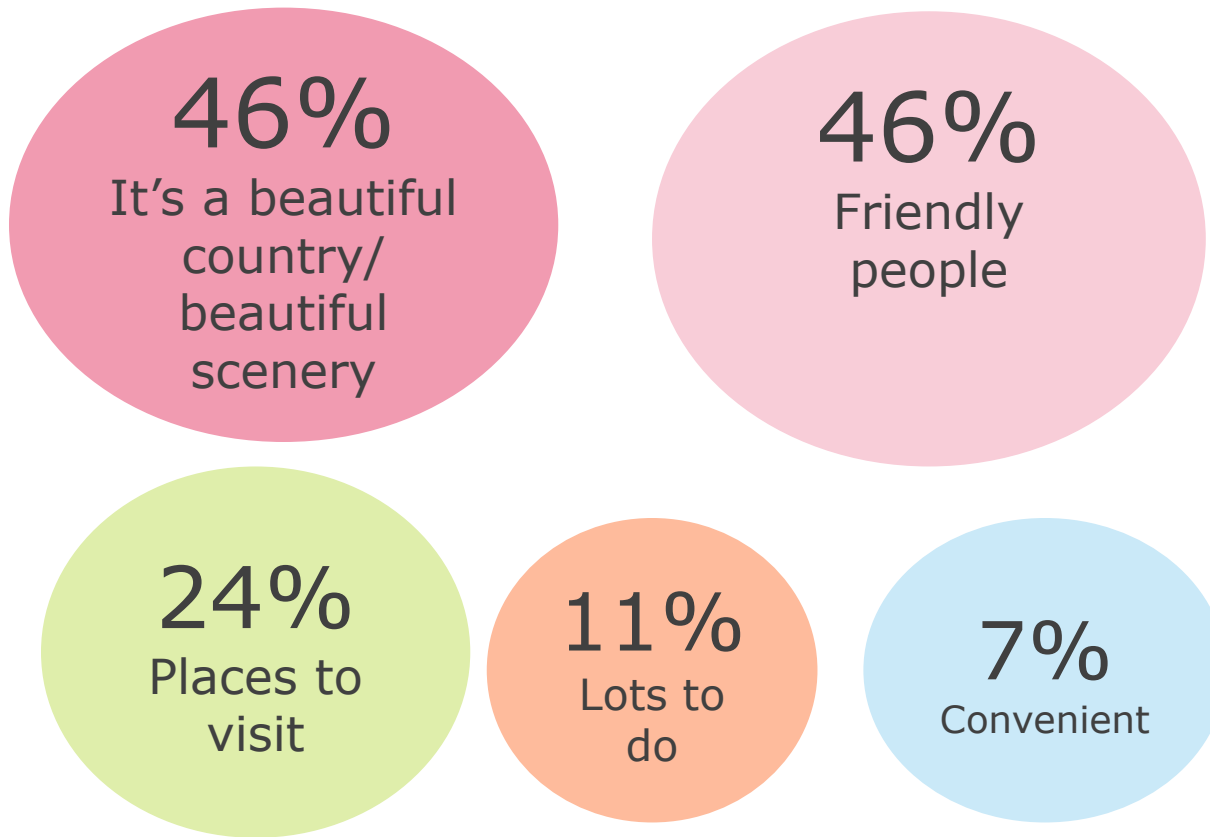
Based on your own preferences, which one place would you strongly recommend?

Base: All respondents n=604

Reasons for recommending Wales

- Unprompted, the main reasons for recommending Wales for a holiday/short break are its natural beauty and friendly people. The places to visit, things to do and convenience of travel were also mentioned.

Reasons for recommending Wales, Percentage of mentions.



'In all the places I have ever visited I have never met nicer people and so helpful too.

"Just beautiful everywhere you look ... castles, scenery, people are so nice, so lovely and just feels very safe."

"It has great scenery with mountains and valleys. It is easy to travel to from Ireland. It is good value for money and the people are friendly."

"It's a great place, there's loads to do and see and people are very friendly ."

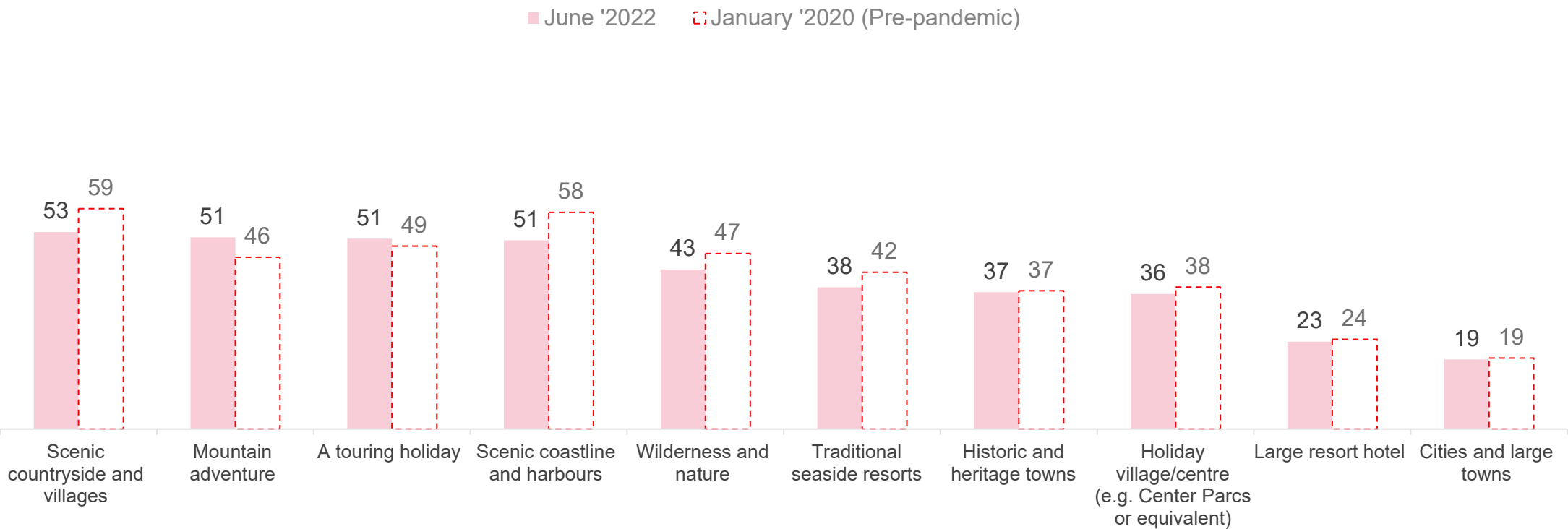
D1b. In one sentence, what is it about Wales that makes it your recommended destination? It might help for you to write down the rationale you would give your friend

Base: All respondents that recommended Wales n=54

Destination types associated with Wales compared to 2020

- In terms of destination types, Wales is most likely to be associated with ‘scenic countryside and villages’, ‘mountain adventure’, ‘a touring holiday’ and ‘scenic coastline and harbours’. Although there has been some movement since 2020, destination type associations are relatively consistent.

Figure 34. Destination types of Wales compared to 2020, Percentage, All respondents

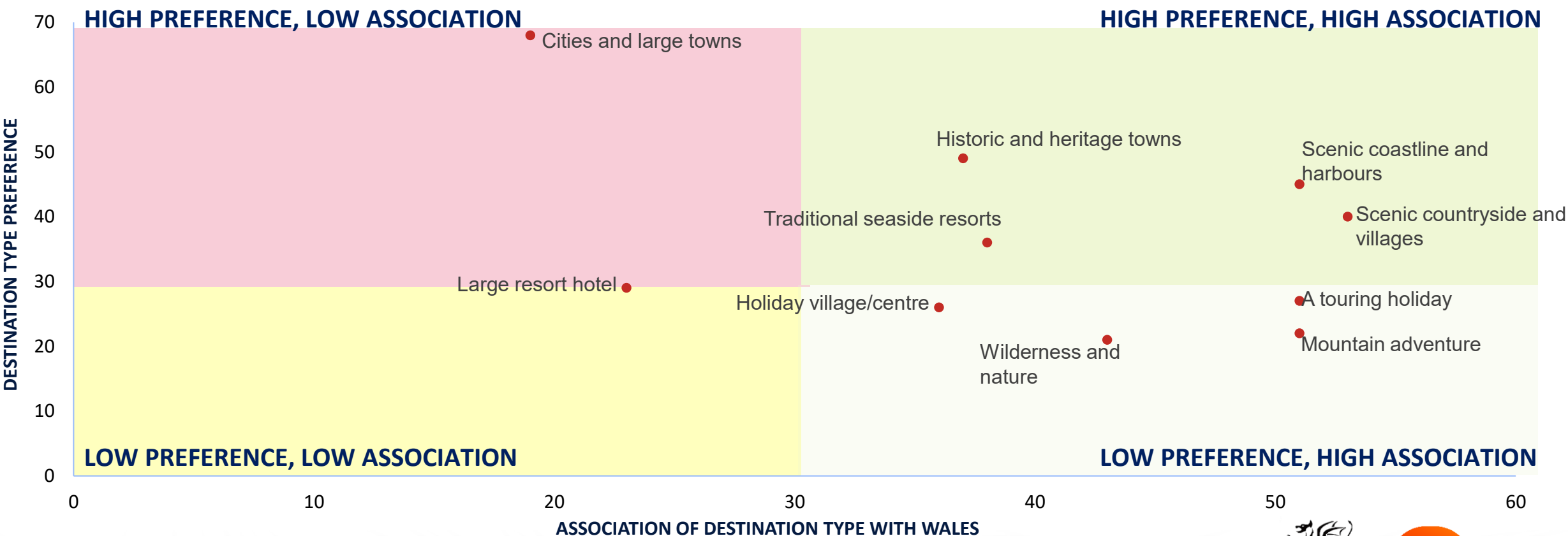


D2 Below are the types of destination you would seriously consider visiting for a holiday or short break in the UK and Ireland. Which, if any, of these places do you most associate with these destination types?
Base: All respondents considering each destination

Wales destination types associations against preferences

- Relative to importance, Wales has relatively high associations with scenic coastlines and countryside, but less so with ‘historic and heritage towns’ and ‘traditional seaside resorts’. Wales scores even less well on ‘cities and large towns’, and ‘large resort hotels’ – two high importance destination types for UK trip intenders.

Figure 35. Wales destination type association against destination type preference, Percentage.











































D2 Below are the types of destination you are seriously considering visiting for a holiday or short break in the next few years. Which, if any, of these places do you most associate with these destination types?
Base: All respondents considering each destination



Destination types associated with home nations

- Unlike England and Scotland, Wales does not generate the highest association for any destination type – however, it makes the top 2 for the majority, albeit significantly behind the leading destination for each. The gap is closest for ‘a touring holiday’, where it is just 7 points behind Scotland.
- Wales has the lowest association with cities and large towns, and a relatively low association with historic and heritage towns.

Table 1. Destinations most strongly associated with each destination type, All respondents considering each destination type

Scenic countryside and villages	Wilderness and nature	Cities and large towns	Historic and heritage towns	Traditional seaside resorts	Scenic coastline and harbours	Mountain adventure	A touring holiday	Holiday village/centre (e.g. Center Parcs or equivalent)	Large resort hotel
 58%	 68%	 92%	 72%	 63%	 55%	 77%	 59%	 58%	 50%
 56%	 43%	 39%	 65%	 38%	 54%	 51%	 51%	 36%	 23%
 53%	 34%	 33%	 37%	 28%	 51%	 33%	 51%	 20%	 22%
 48%	 30%	 19%	 37%	 16%	 45%	 30%	 50%	 18%	 16%

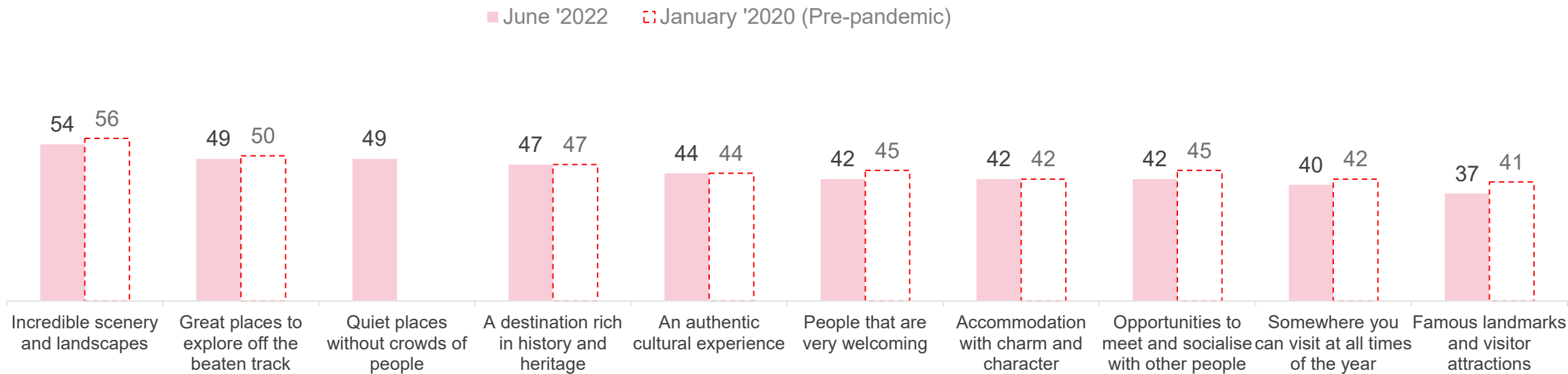
D2 Below are the types of destination you would seriously consider visiting for a holiday or short break in the UK and Ireland. Which, if any, of these places do you most associate with these destination types?

Base: All respondents considering each destination

Destination influence associations with Wales compared to 2020

- In terms of destination influence associations, Wales is most associated with ‘incredible scenery and landscapes’, followed by having ‘great places to explore off the beaten track’ and ‘quiet places without crowds of people’ – all generating an association of 49% and above.
- ‘Destination influence associations’ are relatively consistent with 2020.

Figure 36. Destination influence associations with Wales compared to 2020, Percentage, All respondents



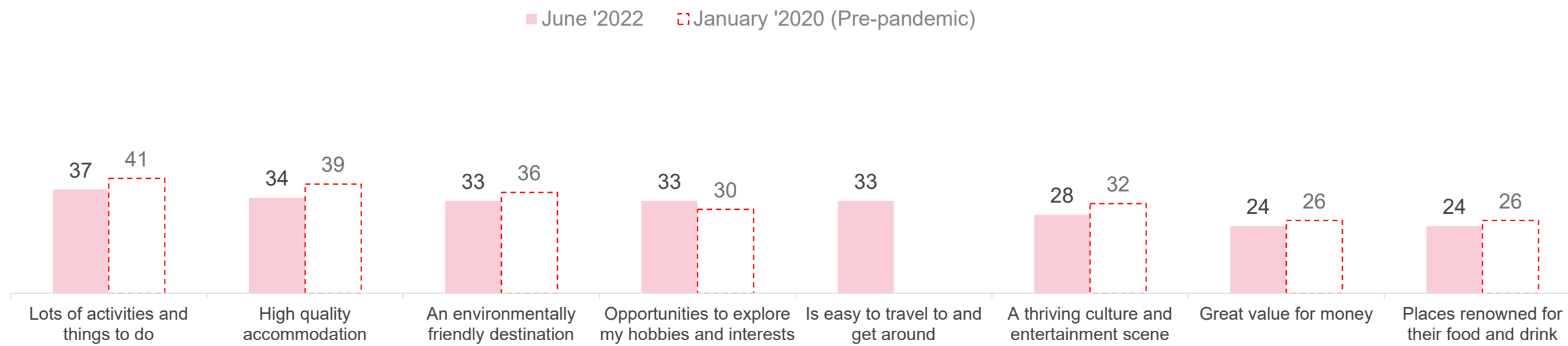
D3. Below are the destination influences we showed you earlier. Which, if any, of these places do you most associate with each influence?
Base: All respondents n=604



Destination influence associations with Wales compared to 2020

- Wales has weaker associations as somewhere with ‘places renowned for their food and drink’. Perhaps significantly given its importance, UK trip intenders also have a low association with Wales for being somewhere that offers ‘great value for money’.

Figure 37. Destination influence associations with Wales compared to 2020, Percentage, All respondents



D3. Below are the destination influences we showed you earlier. Which, if any, of these places do you most associate with each influence?

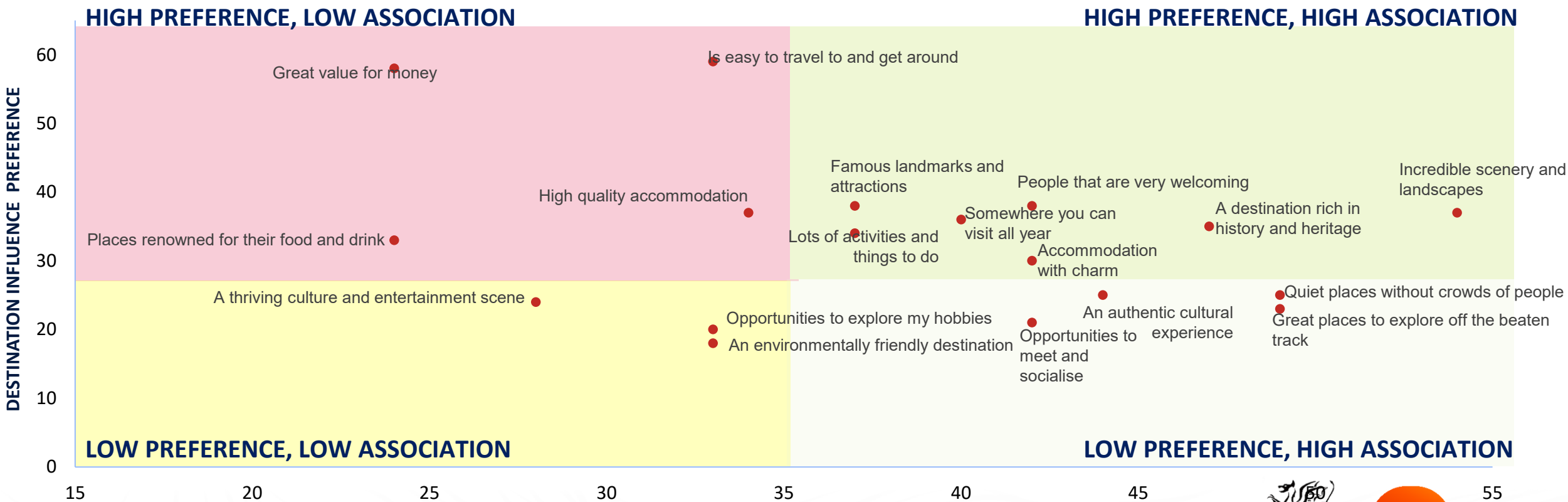
Base: All respondents n=604



Wales destination influence associations against preferences

- Wales scores relatively highly for a number of ‘high preference’ destination influences – in particular ‘incredible scenery and landscapes’ and ‘a destination rich in history and heritage’. A number of important influences score low however – in particular, ‘is easy to travel to and get around’, ‘high quality accommodation’, ‘great value for money’, a ‘thriving culture and entertainment scene’ and ‘places renowned for their food and drink’.

Figure 38. Wales destination influence association against destination influence preference, Percentage.



D3. Below are the destination influences we showed you earlier. Which, if any, of these places do you most associate with each influence?









































Base: All respondents n= 604



Destination associations – trip influences

- Relative to other destinations, Wales has the weakest associations for the majority of trip influences – only ‘people that are very welcoming’ and ‘an environmentally friendly destination’ in the top 3.
- Scotland is most strongly associated with welcoming people, an authentic cultural experience and being rich in history and heritage. England is most strongly associated with famous landmarks and attractions, a thriving entertainment scene and somewhere to visit at all times of year

Table 2. Destinations most strongly associated with each trip influence, All respondents

People that are very welcoming	An authentic cultural experience	An environmentally friendly destination	A destination rich in history and heritage	Famous landmarks and visitor attractions	A thriving culture and entertainment scene	Somewhere you can visit at all times of the year	Accommodation with charm and character	Great value for money	High quality accommodation
 56%	 63%	 41%	 70%	 74%	 61%	 69%	 57%	 38%	 68%
 47%	 53%	 36%	 63%	 58%	 50%	 59%	 51%	 30%	 48%
 42%	 47%	 33%	 55%	 55%	 46%	 46%	 45%	 30%	 47%
 36%	 44%	 29%	 47%	 37%	 28%	 40%	 42%	 24%	 34%

































D3. Below are the destination influences we showed you earlier. Which, if any, of these places do you most associate with each influence?

Base: All respondents n=604

Destination associations – trip influences

- Positively, Wales ranks 2nd for ‘great places to explore off the beaten track’ and having ‘quiet places without crowds of people’ – the latter only marginally behind Scotland.
- Wales is less associated as a place that is easy to travel to and get around than the other parts of the UK.

Table 3. Destinations most strongly associated with each trip influence, All respondents

Lots of activities and things to do	Great places to explore off the beaten track	Incredible scenery and landscapes	Places renowned for their food and drink	Opportunities to explore my hobbies and interests	Opportunities to meet and socialise with other people	Quiet places without crowds of people	Is easy to travel to and get around
 74%	 61%	 73%	 49%	 55%	 59%	 52%	 62%
 50%	 49%	 59%	 42%	 42%	 54%	 49%	 56%
 49%	 48%	 54%	 37%	 37%	 49%	 41%	 40%
 37%	 37%	 42%	 24%	 33%	 42%	 22%	 33%

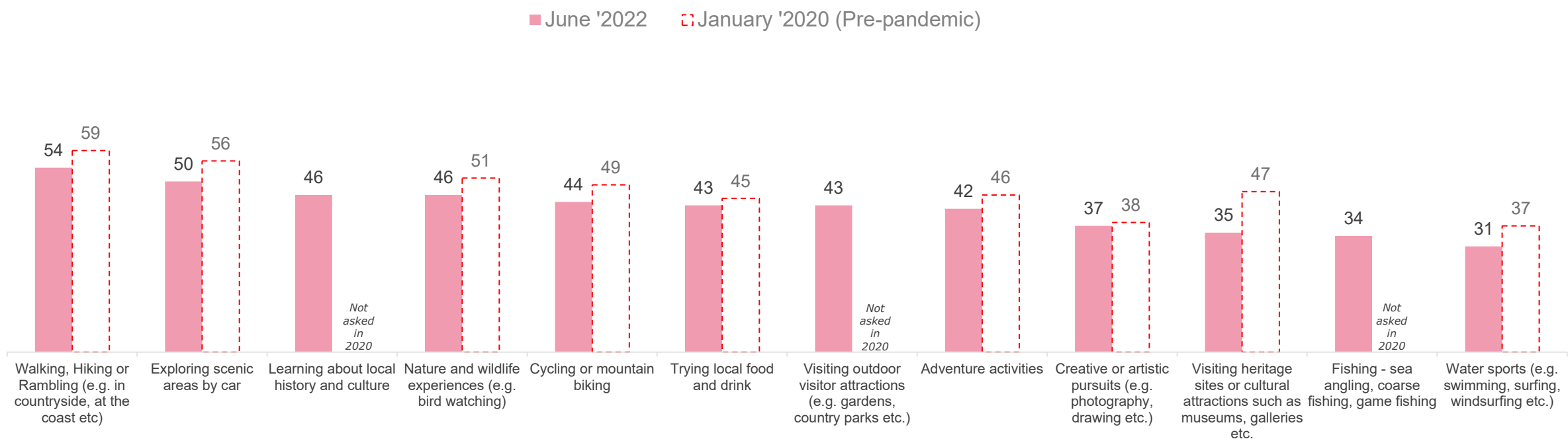
D3. Below are the destination influences we showed you earlier. Which, if any, of these places do you most associate with each influence?

Base: All respondents n=604

Experiences associated with Wales compared to 2020*

- In relation to experiences, Wales has the highest associations with ‘walking, hiking or rambling’, ‘exploring scenic areas by car’ and ‘learning about local history and culture’.
- Experience associations are relatively similar to 2020, although all have decreased a little, ‘visiting heritage sites or cultural attractions’ decreasing the most (down 12 percentage points), correlating with this experience being less important to UK trip intenders in general, and similar drops for other destinations.

Figure 39. Experience associations with Wales compared to 2020, Percentage Top 12, All respondents



D4. And which, if any, of these places do you think are best suited to these holiday experiences?

Base: All respondents n=604

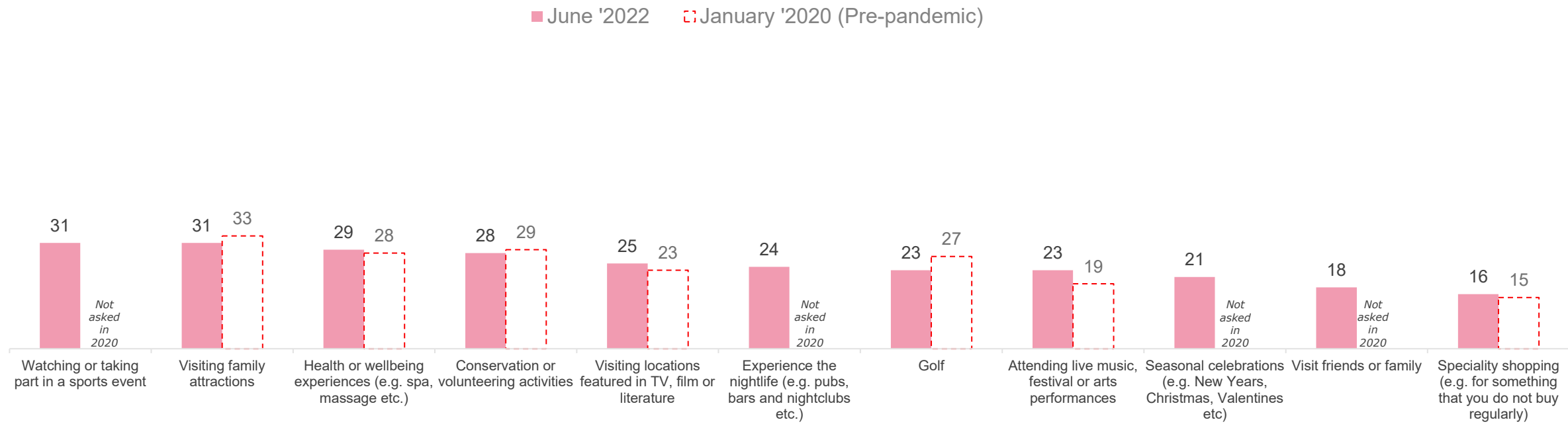
*Differences with 2020 may in part be driven by the increasing number of options available on the question



Experience associations with Wales compared to 2020

- Wales has the lowest associations with 'speciality shopping', 'visiting friends and family' and 'seasonal celebrations'.

Figure 40. Experience associations with Wales compared to 2020, Percentage Bottom 11, All respondents



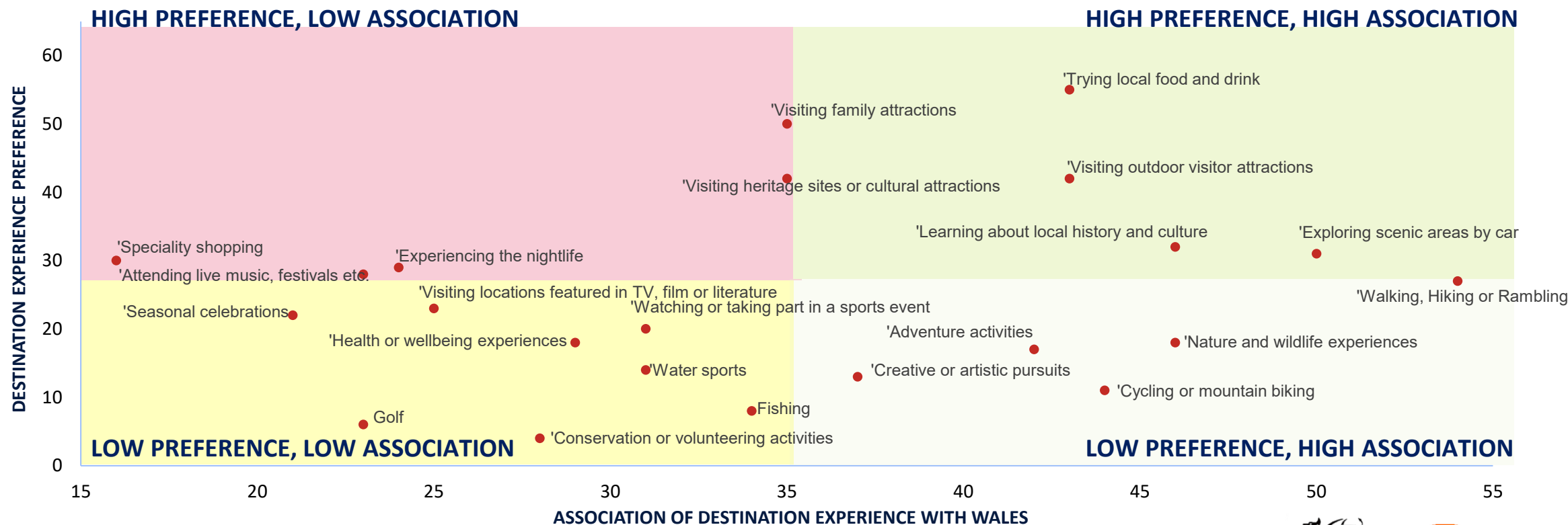
D4. And which, if any, of these places do you think are best suited to these holiday experiences?
Base: All respondents n=604



Wales destination experience associations against preferences

- Wales has generally high associations with a number of destination experiences that are of high importance, in particular for ‘trying local food and drink’, ‘visiting outdoor attractions’, ‘walking, hiking or rambling’, ‘exploring scenic areas by car’ and ‘learning about local history and culture’.
- ‘Wales has lower associations with a range of experiences that are of mid-level interest on holiday including ‘speciality shopping’, ‘attending live music/festivals’, ‘experiencing nightlife’ ‘health and wellbeing experiences’ and ‘visiting locations featured in TV, film or literature’.

Figure 41. Wales destination experience association against destination experience preference, Percentage.



D4. And which, if any, of these places do you think are best suited to these holiday experiences?

















































Base: All respondents n= 604

Visiting family attractions of families only n=415

Destination associations – trip experiences

- Within a competitive context, Wales has the lowest associations with a large number of trip experiences – ‘exploring scenic areas by car’ one of the few making the top 3.
- Scotland is the most strongly associated UK destination for ‘exploring by car’, ‘learning about local history and culture’ and ‘trying local food and drink’
- England is the most strongly associated destination with visiting attractions and locations featured in TV, film or literature, attending live events and speciality shopping

Table 4. Destinations most strongly associated with each trip experience, All respondents

Visiting heritage sites or cultural attractions	Visiting outdoor visitor attractions	Visiting family attractions	Learning about local history and culture	Visiting locations featured in TV, film or literature	Exploring scenic areas by car	Conservation or volunteering activities	Creative or artistic pursuits	Health or wellbeing experiences	Trying local food and drink	Attending live music, festival or arts performances	Speciality shopping
 37%	 65%	 63%	 62%	 57%	 63%	 35%	 49%	 51%	 62%	 65%	 62%
 53%	 52%	 37%	 59%	 51%	 58%	 31%	 43%	 38%	 56%	 35%	 28%
 49%	 43%	 33%	 57%	 42%	 50%	 28%	 41%	 35%	 50%	 35%	 26%
 35%	 43%	 31%	 46%	 25%	 48%	 28%	 37%	 29%	 43%	 23%	 16%

















































D4. And which, if any, of these places do you think are best suited to these holiday experiences?

Base: All respondents n=604

Destination associations – trip experiences

- More positively, Wales has 'top 2 associations' with outdoor and soft adventure activities such as 'nature and wildlife experiences', 'walking hiking or rambling' and 'cycling or mountain biking' – each positioned behind Scotland.
- Interestingly, broader adventure activities are less associated with Wales than other parts of the UK, although the gap is relatively small.

Table 5. Destinations most strongly associated with each trip experience, All respondents

Speciality shopping	Nature and wildlife experiences	Walking, Hiking or Rambling	Adventure activities	Cycling or mountain biking	Water sports	Fishing - sea angling, coarse fishing, game fishing	Seasonal celebrations	Golf	Experience the nightlife	Watching or taking part in a sports event	Visit friends or family
 62%	 62%	 67%	 52%	 56%	 40%	 52%	 50%	 55%	 69%	 61%	 56%
 28%	 46%	 54%	 46%	 44%	 36%	 43%	 47%	 40%	 40%	 40%	 28%
 26%	 43%	 51%	 42%	 42%	 34%	 34%	 32%	 38%	 40%	 31%	 24%
 16%	 37%	 40%	 42%	 30%	 31%	 32%	 21%	 23%	 24%	 30%	 18%

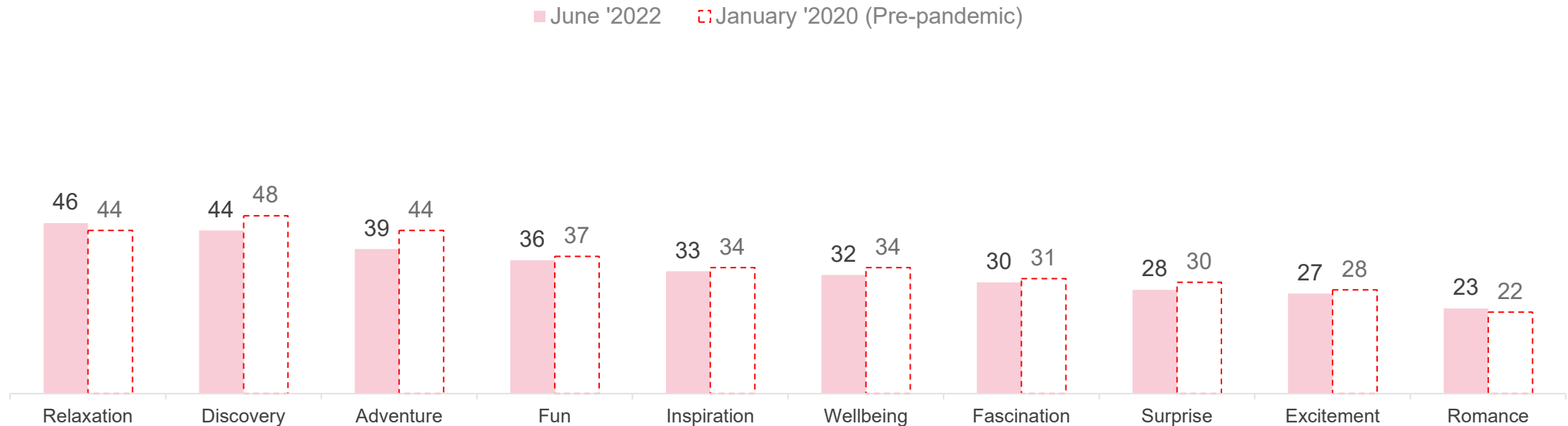
D4. And which, if any, of these places do you think are best suited to these holiday experiences?

Base: All respondents n=604

Destination associations - feelings compared to 2020

- In terms of 'feelings', Wales is most likely to be associated with relaxation, discovery and adventure – least likely to be associated with romance, excitement and surprise.
- 'Feelings associations' with Wales are relatively similar to 2020.

Figure 42. Destination feelings associations with Wales compared to 2020, Percentage, All respondents















































D5. The list below outlines some feelings other people have experienced on holidays and short breaks. From what you know or imagine, which of these places are most likely to produce these feelings on a holiday or short break?

Base: All respondents n=604

Destination associations – trip feelings

- In a competitive context, Wales only generates one 'top 2 feelings association' for relaxation, with a top 3 association for 'adventure'.
- Scotland generates the strongest sense of emotion (ranked 1st for 8 out of 11 feelings), despite being the destination with the 3rd highest previous visits and familiarity.

Table 6. Destinations most strongly associated with each trip feeling, All respondents

Excitement	Relaxation	Inspiration	Surprise	Adventure	Luxury	Discovery	Wellbeing	Fun	Romance	Fascination
 57%	 54%	 49%	 41%	 59%	 65%	 62%	 43%	 62%	 47%	 51%
 43%	 46%	 39%	 38%	 45%	 31%	 47%	 37%	 51%	 34%	 38%
 35%	 44%	 38%	 36%	 39%	 24%	 44%	 33%	 46%	 28%	 37%
 27%	 38%	 33%	 28%	 37%	 19%	 44%	 32%	 36%	 23%	 30%

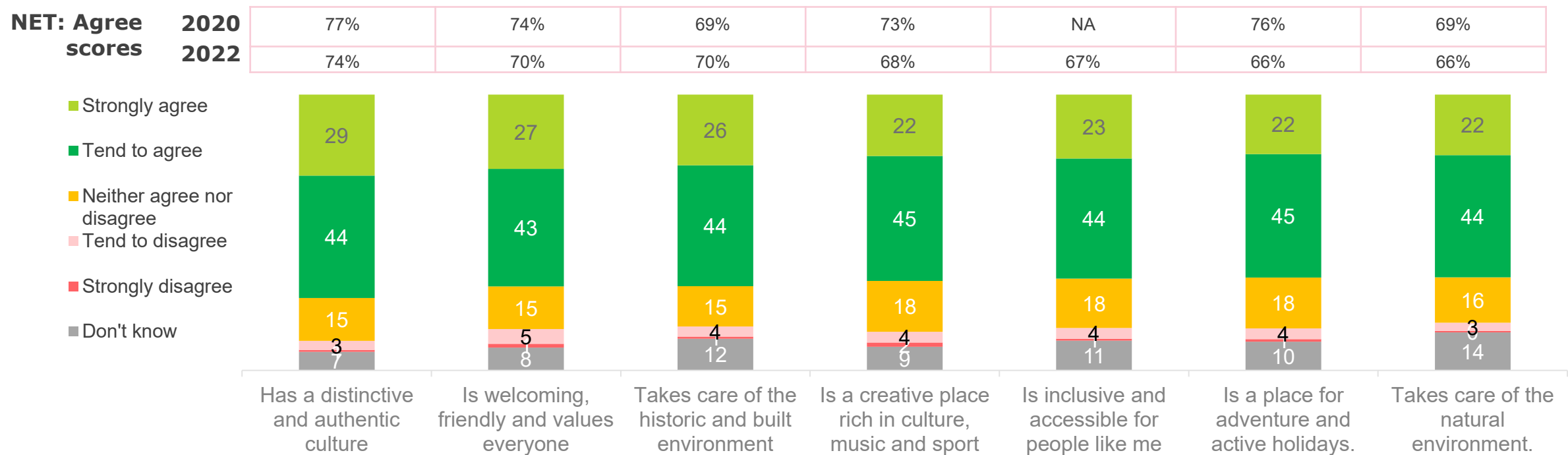
D5. The list below outlines some feelings other people have experienced on holidays and short breaks. From what you know or imagine, which of these places are most likely to produce these feelings on a holiday or short break?

Base: All respondents n=604

Wider brand perceptions of Wales

- Wales has relatively strong associations on a number of areas, in particular as somewhere that ‘has a distinctive and authentic culture’, ‘is welcoming, friendly and values everyone’ and ‘takes care of the historic and built environment’.

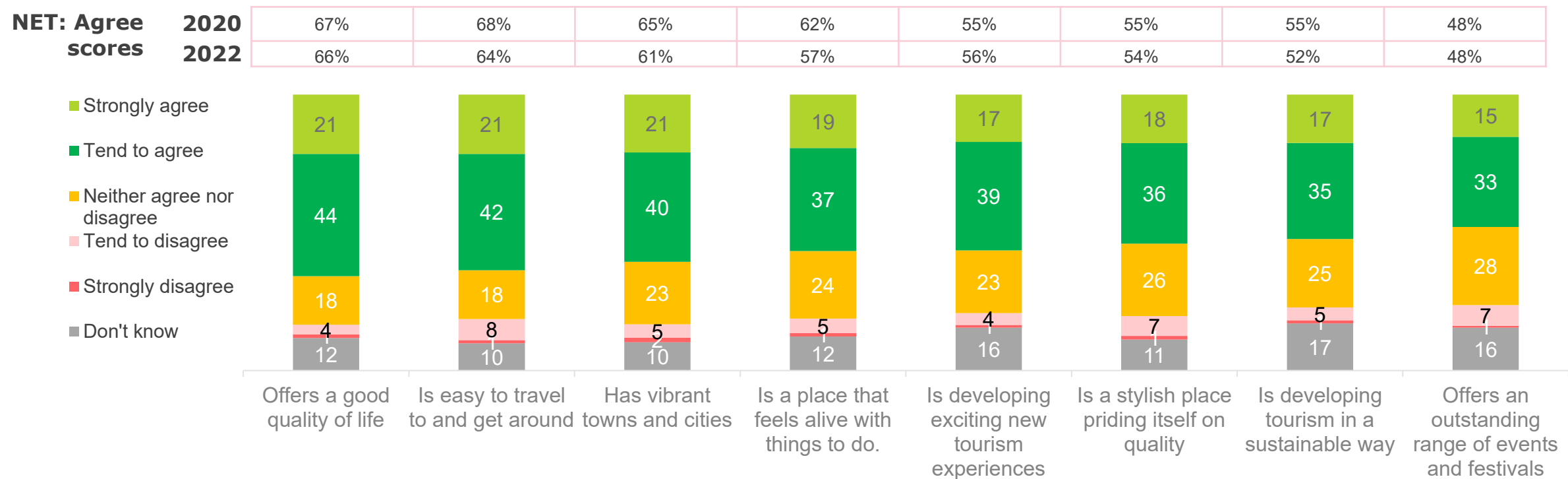
Figure 43. Brand Ratings for Wales, Percentage Top 7



Wider brand perceptions of Wales

- Wales' associations are lower with 'offers an outstanding range of events and festivals', although this is driven by a relatively high proportion who 'don't know'/'neither agree nor disagree' rather than a high proportion 'disagreeing'.

Figure 44. Brand Ratings for Wales, Percentage Bottom 8



F5. How much do you agree or disagree with these statements about Wales?
Base: All respondents n=604

Future visits to Wales



Trips taken in Wales in 2022 and future Wales trips

- 1 in 4 of UK intenders are very open to visiting Wales for a holiday/short break in the next five years with a further 55% fairly interested. 1 in 11 (9%) have taken a short break or holiday in Wales so far in 2022 (between January and June), with 11% stating they have either already booked or will definitely take a Wales trip in the next 12 months. A notable 1 in 5 (21%) state they will 'probably' do so.

Figure 45. Openness to any Wales holiday/short break in next 5 years, Percentage, All respondents

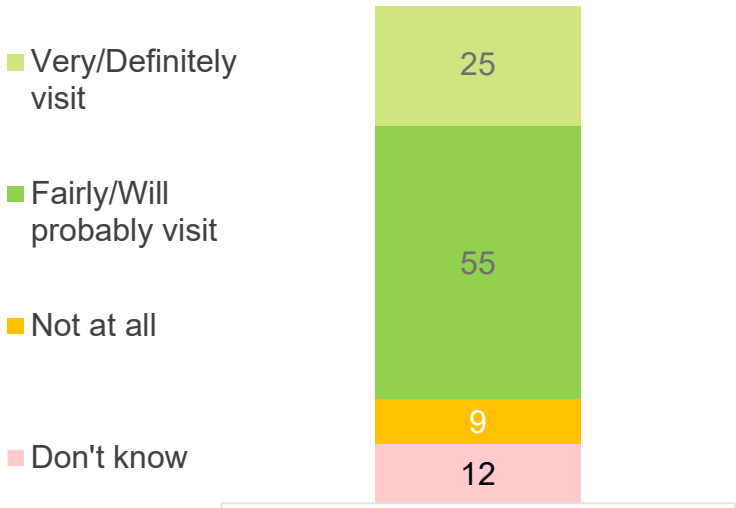


Figure 46. Whether taken a Wales trip between January and June 2022, Percentage, All respondents

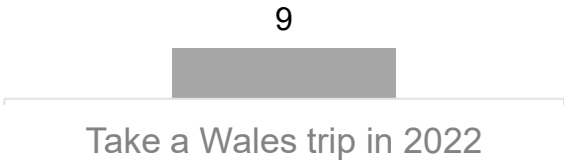
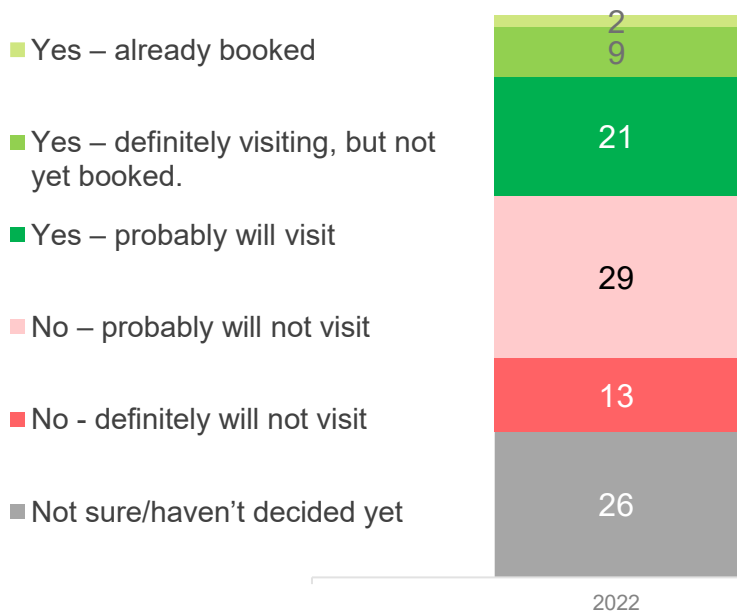


Figure 47. Wales trips intended in next 12 months, Percentage, All respondents



F3.How open would you be to taking a holiday/short break in Wales in the next 4-5 years?F1. Are you intending to take a holiday or short break in Wales in the next 12 months?
F2b. And have you already taken a holiday or short break in Wales this year?
Base: All respondents n=604



Trips intended to Wales in next 12 months – by life stage

- Pre-nesters and families are the life stages most likely to be ‘definitely intending’ to take a Wales holiday/short break in the next 12 months – about 1 in 6 intending to do so.
- Only 1% of retirees and 6% of ‘older independents’ are planning a Wales short break or holiday in the next 12 months, a drop-off that wasn’t apparent before the pandemic in early 2020.

Figure 48. Already booked/definitely visiting Wales in next 12 months by life stage, All respondents



F1. Are you intending to take a holiday or short break in Wales in the next 12 months?
Base: Pre-nesters n=111; Families n=204; Older Independents n=185; Retirees n=104



Trips intended to Wales in next 12 months – by segment and region

- Residents of Dublin are the most likely be planning a trip to Wales in the next 12 months, with Buzzseekers and Cultural Buffs the dominant segments. The relatively low incidence of Explorers and Sightseers planning a Wales trip is in line with life stage (these segments being the oldest) and general intentions to visit the UK this year.

Figure 49. Already booked/definitely visiting Wales in next 12 months by life stage, All respondents

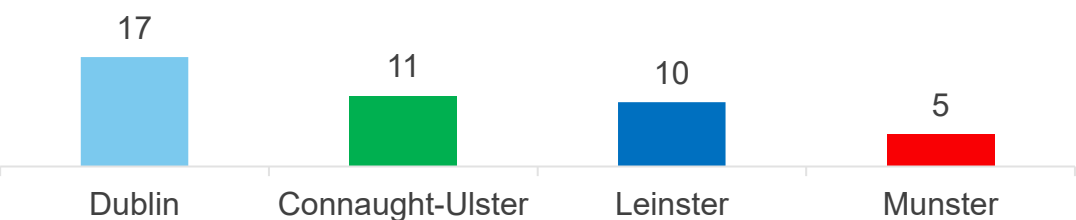
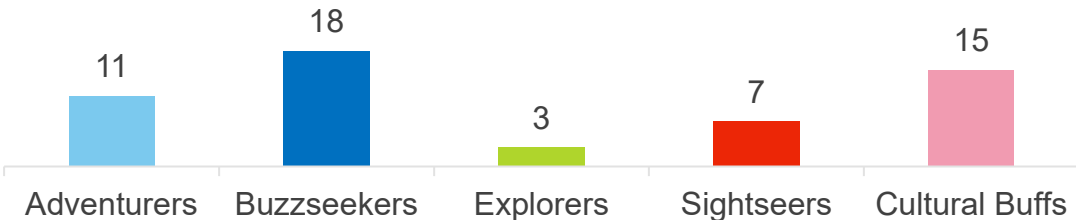


Figure 50. Already booked/definitely visiting Wales in next 12 months by segment, All respondents



F1. Are you intending to take a holiday or short break in Wales in the next 12 months?
Base: Dublin n=168; Connaught-Ulster n=105; Leinster n=163; Munster n=168; Adventurers n=136; Buzzseekers n=155; Explorers n=143; Sightseers n=85; Cultural Buffs n=85

Months taken or intending to take a trip in Wales

- Wales trip intenders are most likely to be planning their Wales trip in September.
- When asked their preferred months for an overnight trip in Wales more generally, the window extends somewhat, ‘July to August’ being the ideal period, followed by ‘May to June’ and ‘September to October’
- Both charts indicate that November to February is relatively unappealing for a Wales trip.

Figure 51. Months taken or intending to take a trip in Wales, Percentage, All respondents

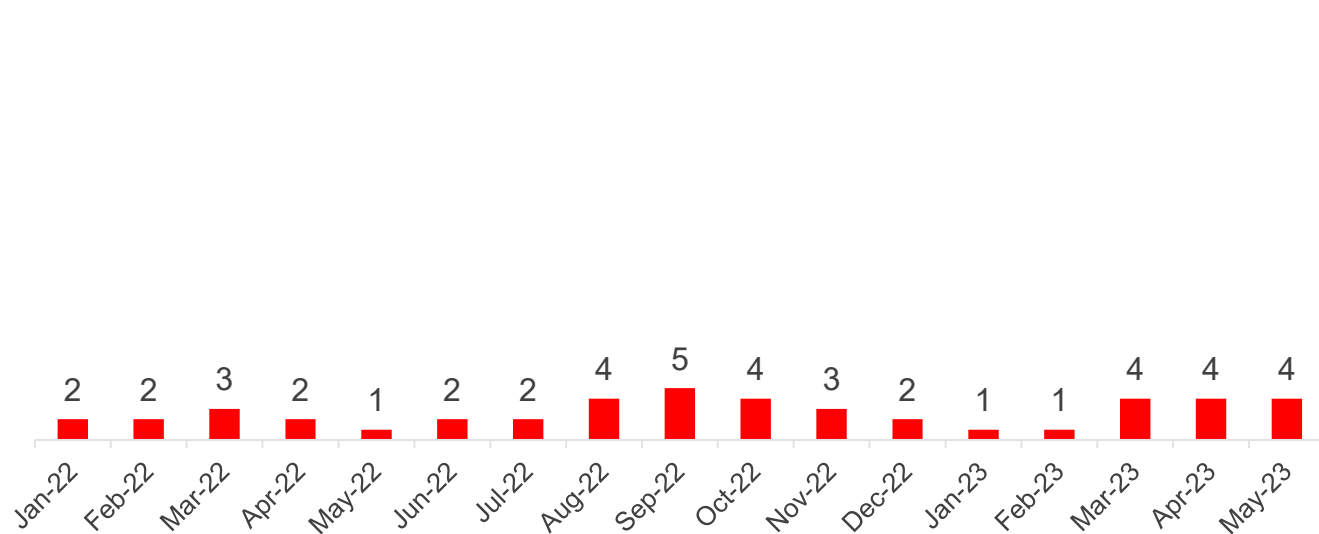
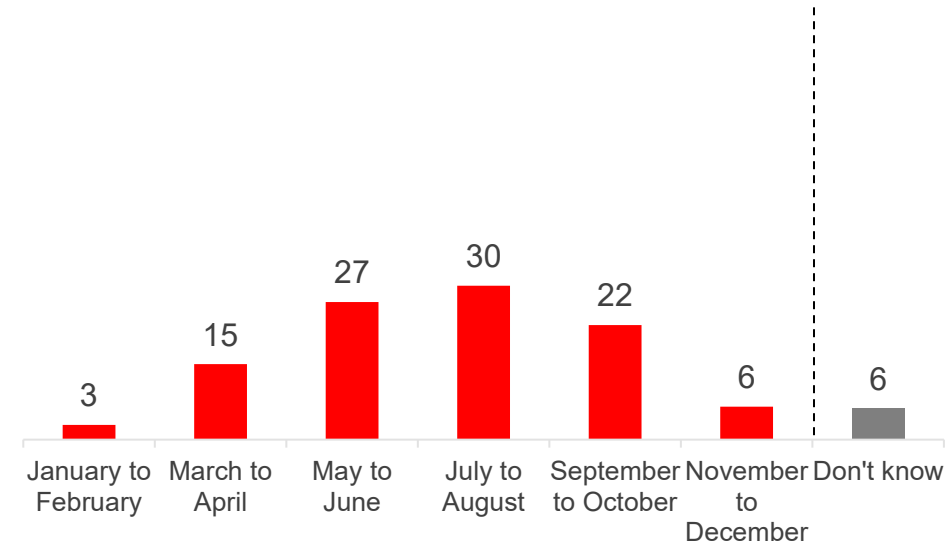


Figure 52. Preferred months for taking an overnight trip in Wales, Percentage, All respondents open to an overnight trip to Wales



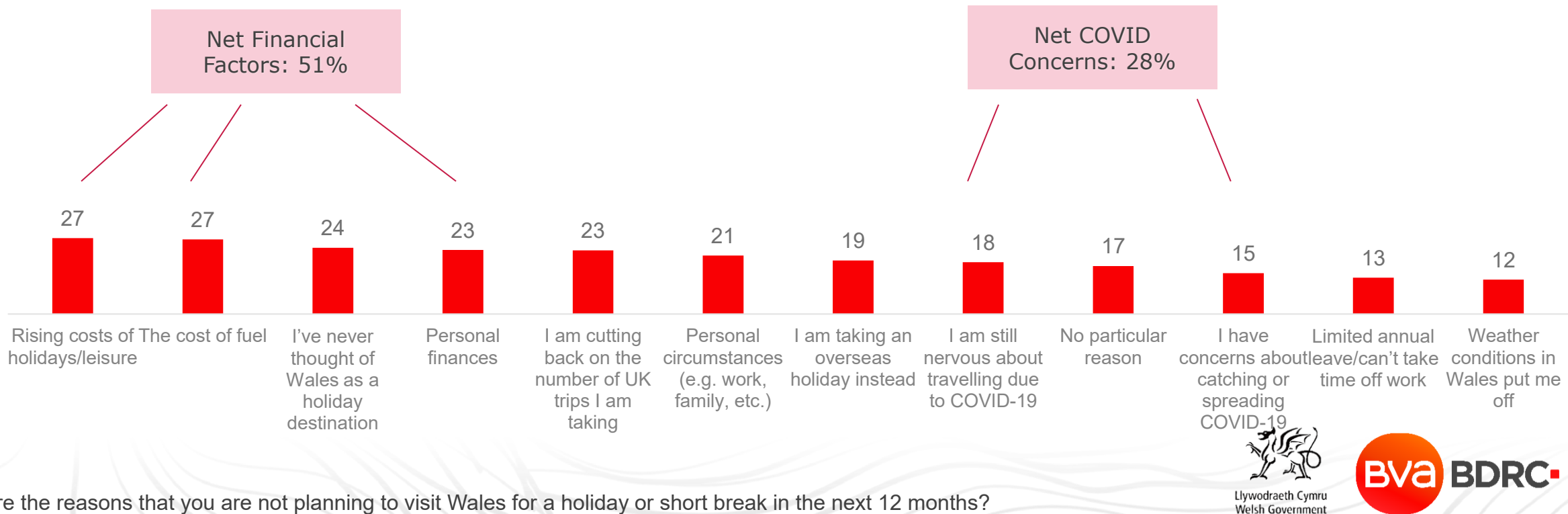
F2a. When are you planning to take a holiday or short break in Wales in the next few years?
F2c. In which of these months did you take this overnight trip to Wales this year?
F4. Which, if any, of these periods of the year would be your preferred times for taking a short break or holiday in Wales? Base: All respondents n=604; All respondents open to taken a Wales trip n=481



Reason for not visiting Wales in the next 12 months

- Financial factors are a leading reason for UK trip intenders not visiting Wales for a holiday or short break – ‘the cost of fuel’ and the ‘rising costs of holidays/leisure’, the leading two reasons, with ‘personal finances’ 4th. Together, 51% of Wales non-intenders cite some sort of financial reason as a key barrier.
- COVID-19 also remains a barrier, 18% nervous about travelling due to COVID and 15% concerned about catching or spreading it – amounting to 28% at a net level.
- Around 1 in 4 state they have never thought of Wales as a holiday destination before as a reason for not visiting.

Figure 53. Reasons for not visiting Wales for a holiday or short break in next 12 months, Percentage Top 12,



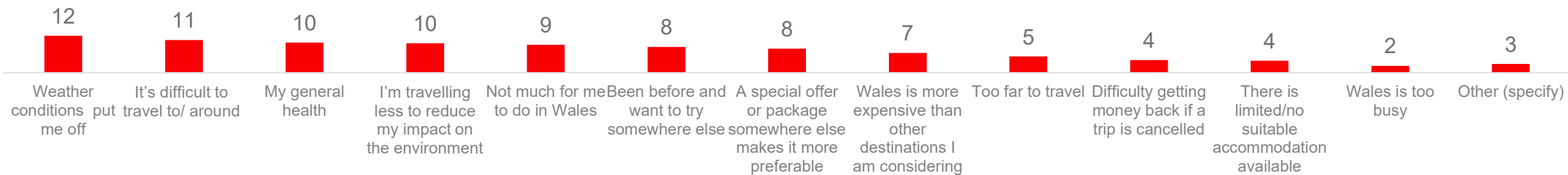
F4d. What are the reasons that you are not planning to visit Wales for a holiday or short break in the next 12 months?

Base: All respondents not planning a trip to Wales in 2022 n=414

Reason for not visiting Wales in the next 12 months

- There are a number of other reasons also why people are not planning to visit Wales– ‘weather conditions’ cited by 12% and ‘it’s difficult to travel around’ by 11%.

Figure 54. Reasons for not visiting Wales for a holiday or short break in next 12 months, Percentage Bottom 12,



F4d.What are the reasons that you are not planning to visit Wales for a holiday or short break in the next Wiles' 12 months?

Base: All respondents not planning a trip to Wales in 2022 n=414

Visiting Wales out of season



Openness to taking an out of season Wales short break or holiday

- Almost half (45%) of UK trip intenders state they are ‘very open’ to the idea of a holiday/short break in Wales outside of the summer season (between September and April).
- Interest is strongest in the Spring and Autumn months, and lowest in January and February – although this broadly replicates known trip-taking patterns.

Figure 55. Openness to out of season Wales trip, Percentage, All respondents

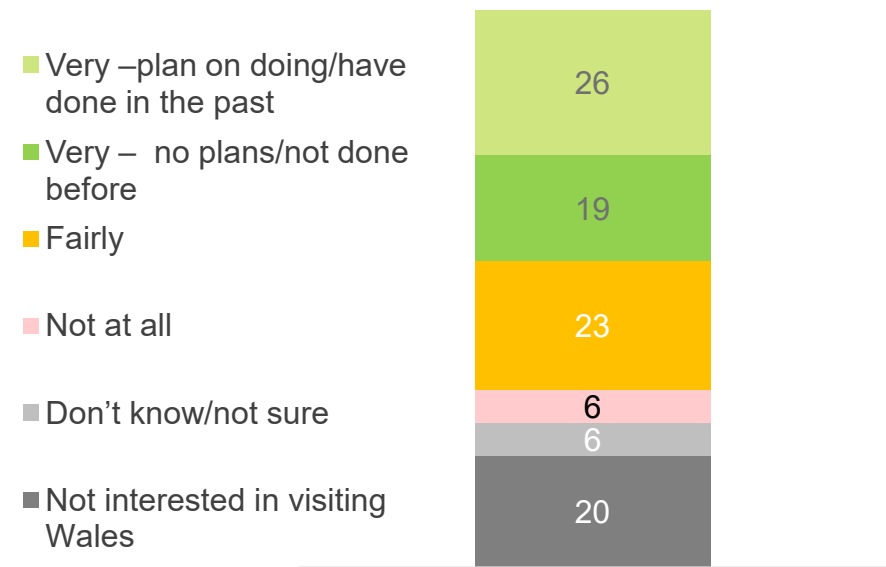
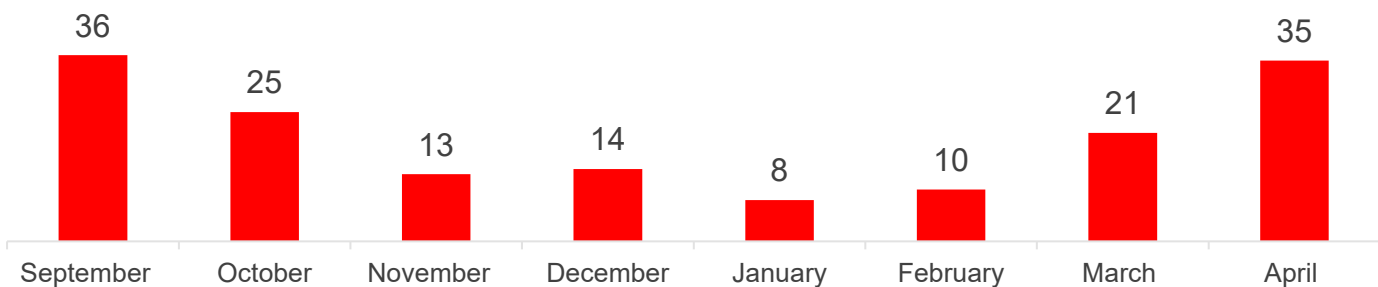


Figure 56. Months would be open to a future out of season short break or holiday in Wales, Percentage, All respondents

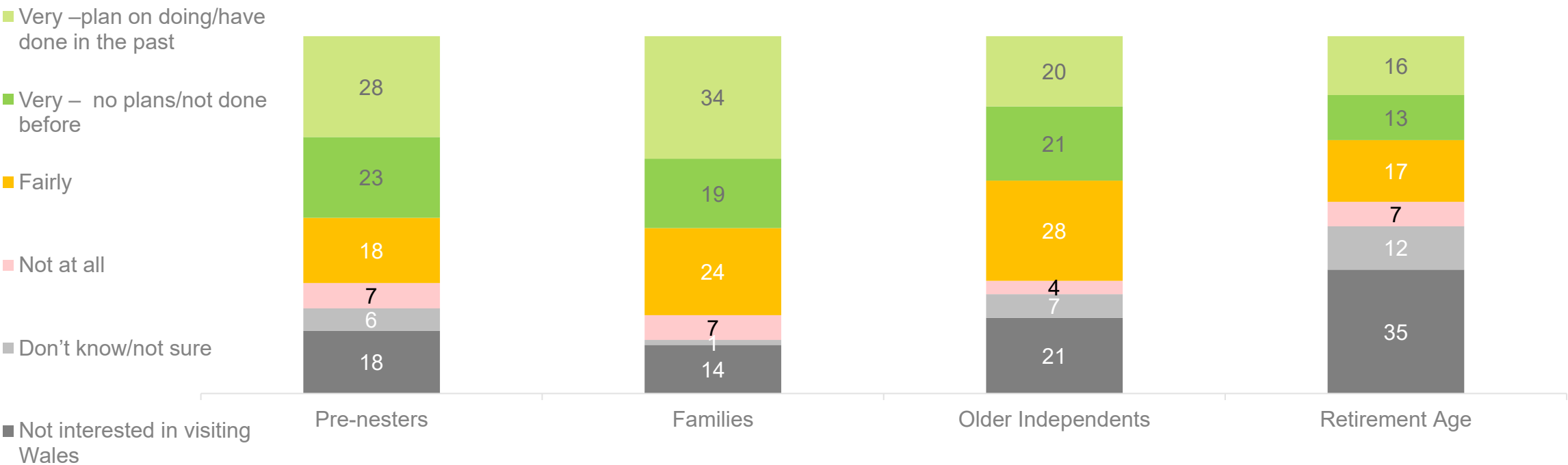


F5ii. How open would you be to taking a holiday/short break in Wales outside of the main summer season – that is between September and April? F7. Which months would you be open to taking a future out of season short break or holiday in Wales? Base: All respondents n=604 Base: All respondents interested in Wales out of season trip n=409

Openness to out of season Wales trip - by life stage

- Families exhibit the highest interest in visiting Wales for a holiday or short break out of season, in line with overall trip intentions. 'Pre-nesters' show the second highest level of openness to visiting Wales outside of the summer season, whilst those of retirement age show the lowest level of interest.

Figure 57. Openness to out of season Wales trip by life stage, Percentage, All respondents

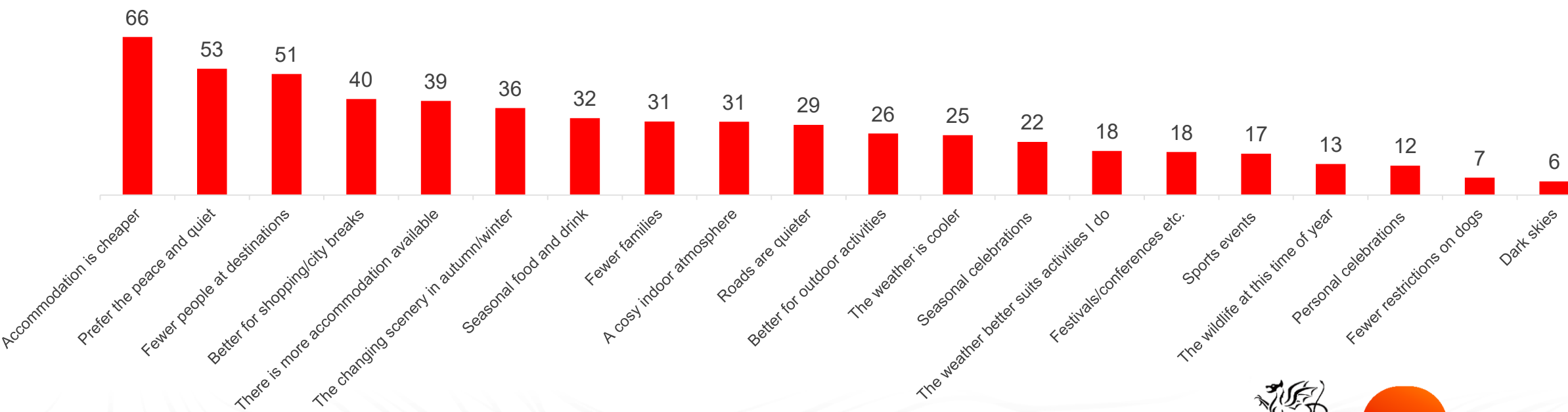


F5ii. How open would you be to taking a holiday/short break in Wales outside of the main summer season – that is between September and April? Base: Pre-nesters n=91; Families n=176; Older Independents n=145; Retirees n=68

Reasons for the appeal of an out of season Wales trip

- The top three reasons for the appeal of an out of season Wales trip are ‘accommodation is cheaper’ (66%), ‘prefer the peace and quiet’ (53%) and ‘fewer people at destinations’ (51%).
- Enjoying seasonal and personal celebrations, festivals and events, and seasonal food and drink currently have lower appeal than enjoying the more peaceful outdoor environment, possibly linked to these being less associated with Wales.
- Around 4 in 10 state that the appeal of an out of season trip to Wales is that it is a better time for shopping and city breaks.

Figure 58. Reasons for the appeal of an out of season Wales trip, Percentage, All respondents open to out of season Wales trip



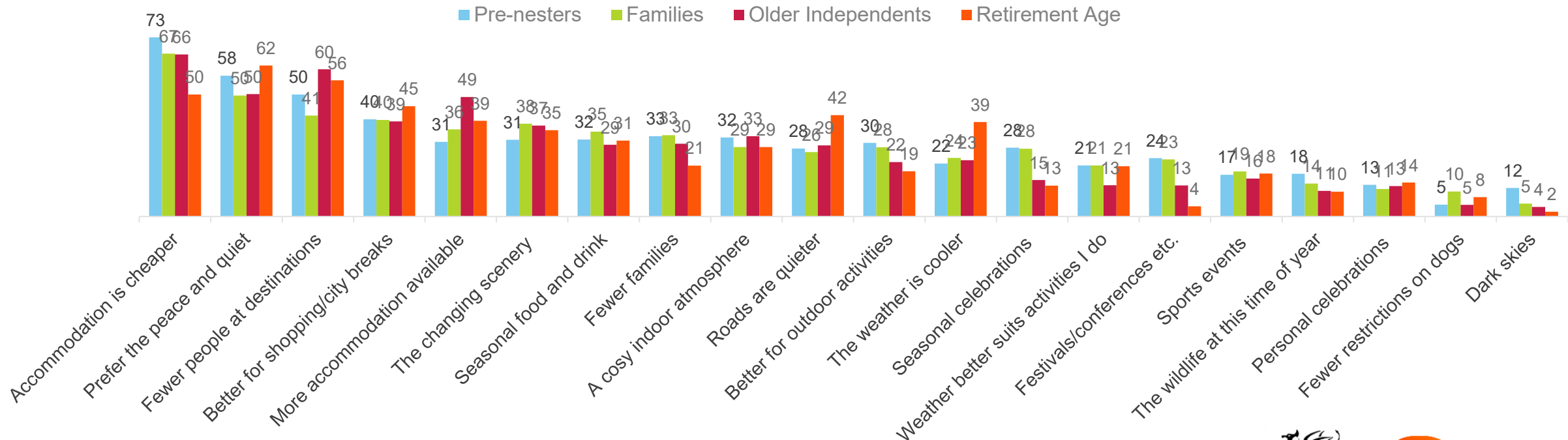
F8. Which, if any, of the following explain the appeal of an out of season holiday/short break in Wales to you?
Base: All respondents interested in Wales out of season trip n=409



Reasons for the appeal of an out of season Wales trip – by life stage

- The reasons for the appeal of an out of season trip in Wales are generally consistent across life stages.
- However, there are a few notable differences – with older life stages stating ‘fewer people’ is of leading importance, and retirees also finding ‘cooler weather’ and ‘roads are quieter’ as appealing.
- ‘Pre-nesters’ index higher on ‘accommodation is cheaper’ relative to other reasons and other life stages, although this is the most important reason for all but retirees.

Figure 59. Reasons for the appeal of an out of season Wales trip by life stage, Percentage, All respondents open to out of season Wales trip



F8. Which, if any, of the following explain the appeal of an out of season holiday/short break in Wales to you?

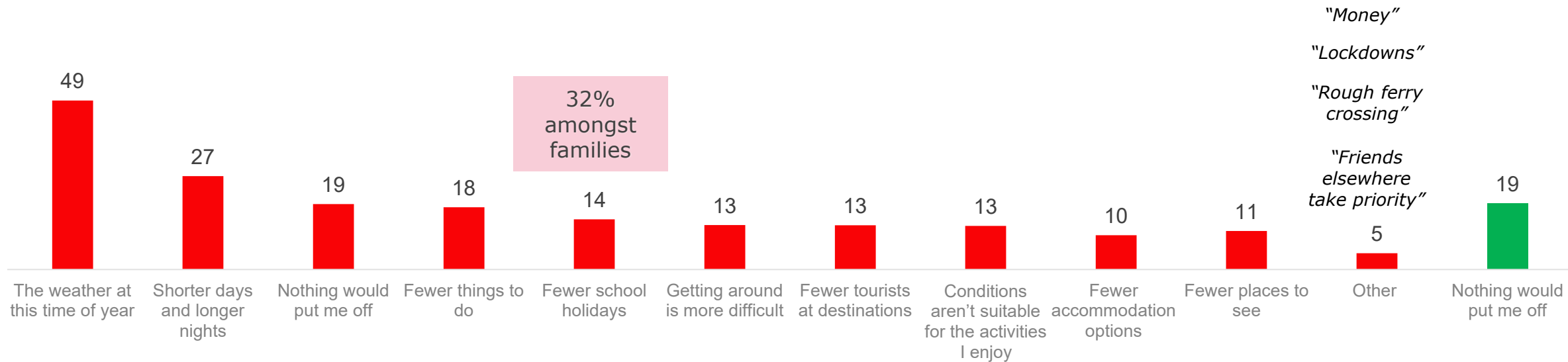
Base: All respondents interested in Wales out of season trip Pre-nesters n=76; Families n=159; Older Independents

n=126; Retirees n=48

Reasons for being put off visiting Wales out of season

- Those who are not open to visiting Wales out of season are most likely to be put off by the weather at that time of year – almost half stating this, followed by ‘shorter days and nights’. A third of families cite ‘fewer school holidays’ as a barrier.

Figure 60. Reasons for being put off visiting Wales for a holiday or short break out of season, Percentage, All not open to out of season trip



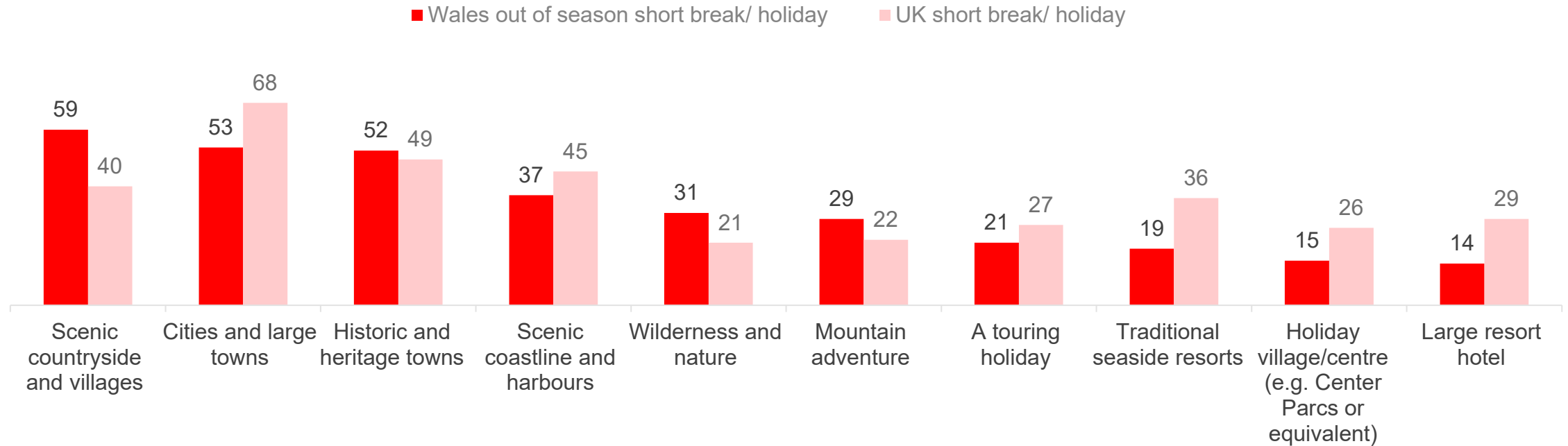
F6. What reasons do you think would put you off taking a short break or holiday in Wales outside of the main summer season - that is between September and April?

Base: All respondents n=604

Destination types seriously considering for out of season trip

- Marking a departure from general UK preference (when 'cities and large towns' is by far the most preferred), 'scenic countryside and villages' is the destination type UK trip intenders would be *most* interested in visiting in Wales out of season (ahead of general UK preference), followed by 'cities and large towns' and 'historic and heritage towns'*.
- However, given Wales' low associations with cities and large towns, other destination types are likely to be more front of mind when booking a Wales out of season trip.

Figure 61. Destination type most interested in visiting on a Wales out of season holiday/short break, Percentage, All respondents open to out of season Wales trip



F9.Which, if any, of the following best describes the types of destination you would be most interested in visiting in Wales out of season?

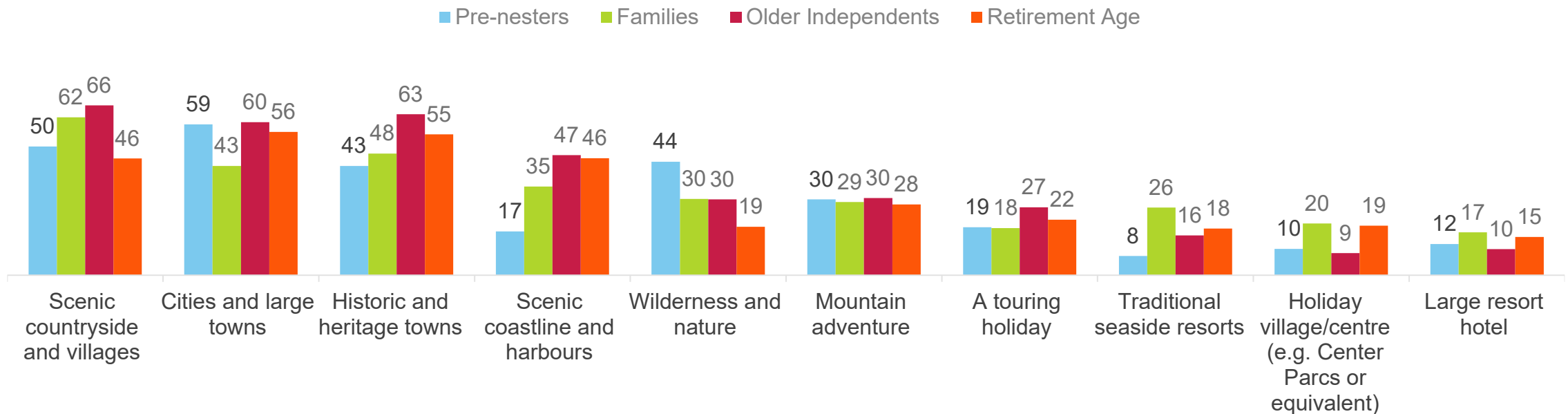
Base: All respondents interested in Wales out of season trip n=409

*Note general preferences are for all UK trip intenders, whilst out of season preference are only of those that are open to a Wales out of season trip

Destination types seriously considering for out of season trip – by life stage

- Relatively similar to wider UK patterns, there are a number of variations in destination type preference by life stage – older life stages more likely to show a preference for ‘historic and heritage towns’ and ‘scenic coastlines and harbours’.
- Families are less likely to be interested in visiting ‘cities and large towns’.

Figure 62. Destination type most interested in visiting on a Wales out of season holiday/short break by life stage, Percentage, All respondents open to out of season Wales trip



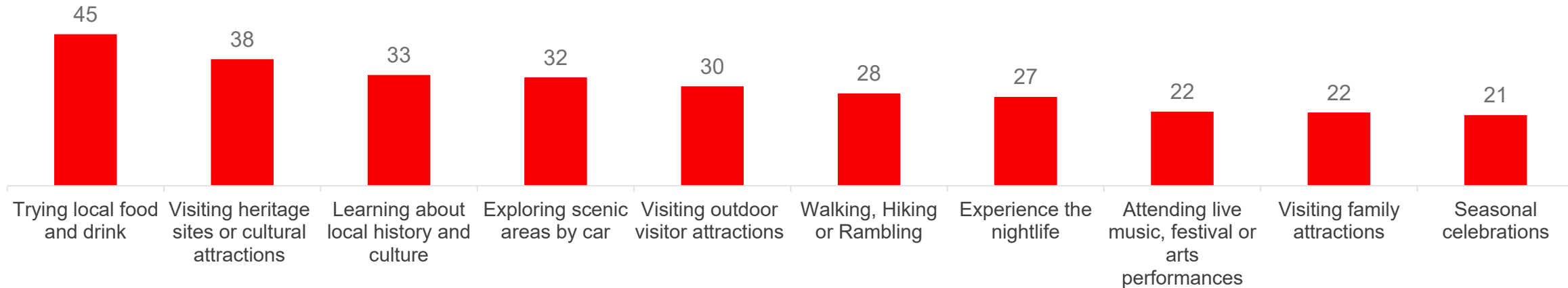
F9.Which, if any, of the following best describes the types of destination you would be most interested in visiting in Wales out of season?

Base: All respondents interested in Wales out of season trip Pre-nesters n=76; Families n=159; Older Independents n=126; Retirees n=48

Experiences would most like to do on out of season trip

- The experiences that are regarded as most interesting on a Wales out of season holiday/short break are relatively consistent with 'general experience preferences' on a *UK holiday/short break* – 'trying local food and drink', 'visiting heritage sites or cultural attractions', 'learning about local history and culture', 'exploring scenic areas by car' and 'visiting outdoor attractions' having the highest preference.*

Figure 63. Experiences most interested in on a Wales out of season holiday/short break, Percentage Top 10, All respondents open to out of season Wales trip



F10.Which, if any, of these activities would you be most interested in doing on an out of season trip in Wales?

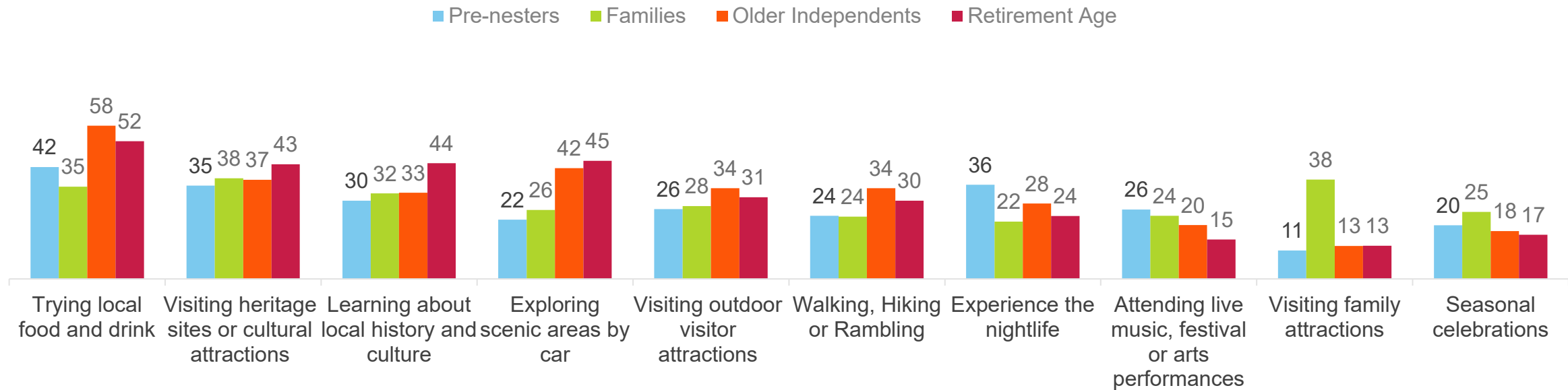
Base: All respondents interested in Wales out of season trip n=409

*Note general preferences are for all UK trip intenders, whilst out of season preference are only of those that are open to a Wales out of season trip

Experiences would most like to do on out of season trip – by life stage

- As with general experience preferences, older life stages tend to index higher on the appeal of ‘trying local food and drink’, ‘visiting heritage sites’, ‘learning about local history and culture’ and ‘exploring scenic areas by car’ for an out of season trip in Wales.
- Unsurprisingly, families are the most interested in ‘visiting family attractions’.
- ‘Pre-nesters’ have a higher level of interest in experiencing the nightlife’ and attending live events.

Figure 64. Experiences most interested in on a Wales out of season holiday/short break by life stage, Percentage Top 10, All respondents open to out of season Wales trip



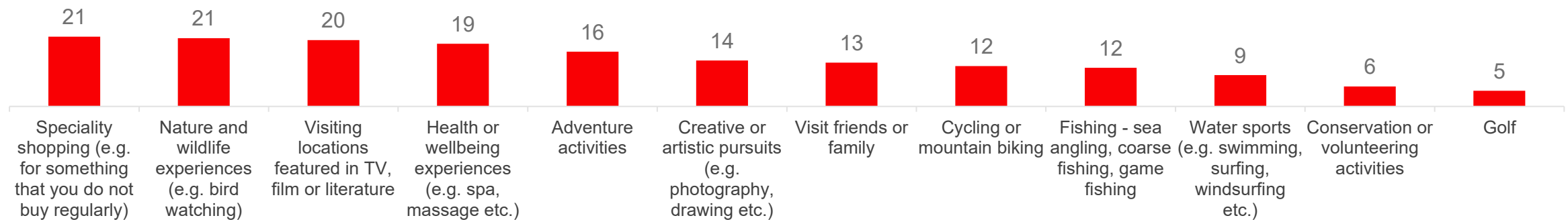
F10.Which, if any, of these activities would you be most interested in doing on an out of season trip in Wales?

Base: All respondents interested in Wales out of season trip Pre-nesters n=76; Families n=159; Older Independents n=126; Retirees n=48

Experiences would most like to do on out of season trip

- A range of other experiences also appeal for an out of season trip to Wales, including ‘speciality shopping’, ‘nature and wildlife experiences’, ‘visiting locations featured in TV, film or literature’, and ‘health or wellbeing experiences’.
- Specific activities such as cycling, fishing, water sports and golf have a lower level of interest for an out of season trip to Wales.

Figure 65. Experiences most interested in on a Wales out of season holiday/short break, Percentage
Bottom 12, All respondents open to out of season Wales trip



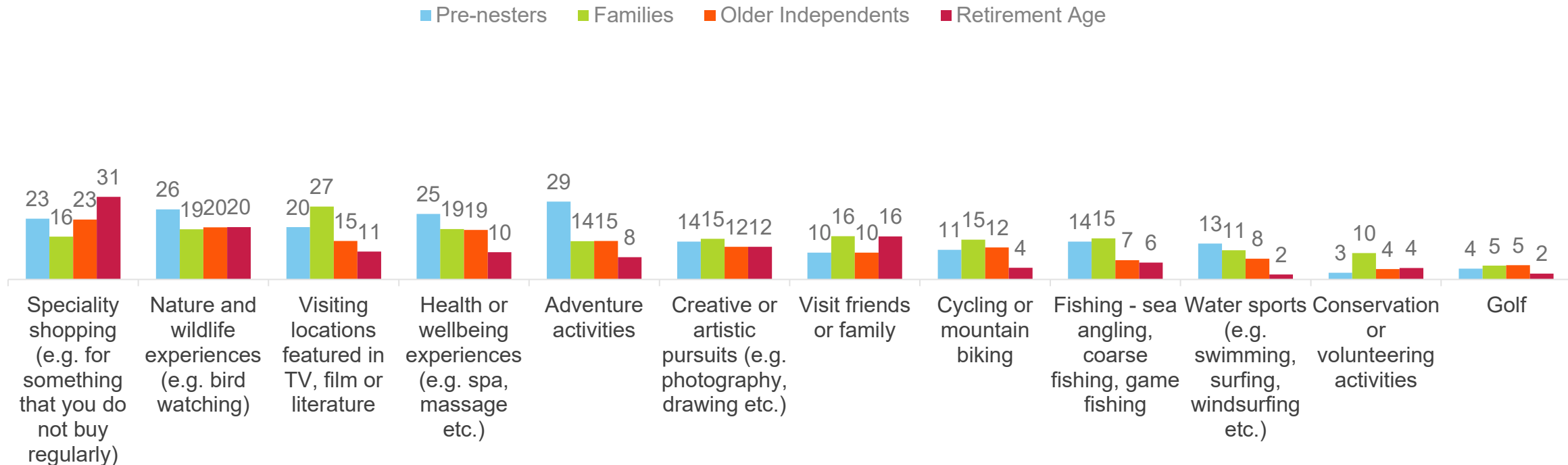
F10.Which, if any, of these activities would you be most interested in doing on an out of season trip in Wales?

Base: All respondents interested in Wales out of season trip n=409

Experiences would most like to do on out of season trip – by life stage

- As with general preferences, younger life stages index higher on interest in 'health or wellbeing activities' and 'adventure activities'.

Figure 66. Experiences most interested in on a Wales out of season holiday/short break by life stage, Percentage Top 10, All respondents open to out of season Wales trip



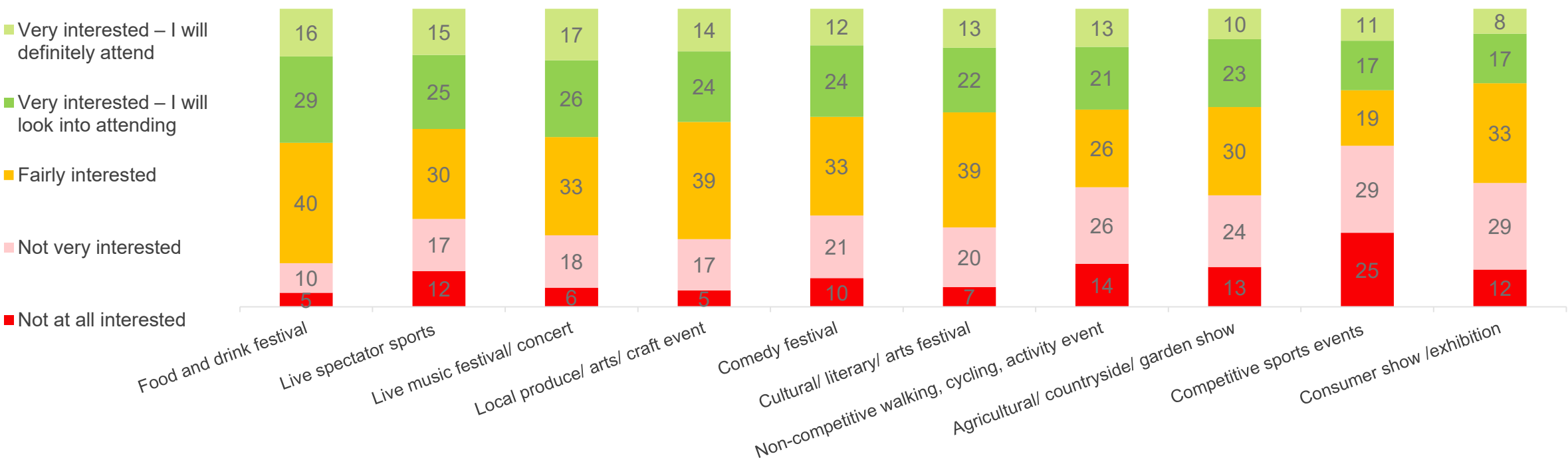
F10.Which, if any, of these activities would you be most interested in doing on an out of season trip in Wales?

Base: All respondents interested in Wales out of season trip Pre-nesters n=76; Families n=159; Older Independents n=126; Retirees n=48

Interest in attending festivals on Wales out of season trip

- There is a high level of interest in attending festivals on a Wales out of season trip – ‘food and drink festivals’ the most appealing followed by ‘live spectator sports’ and ‘live music festival or concert’

Figure 67. Interest in attending festivals on a Wales out of season holiday/short break, Percentage, All respondents open to out of season Wales trip



F11. How, if at all, interested would you be in attending the below types of festivals or events on an out of season holiday/short break in Wales?

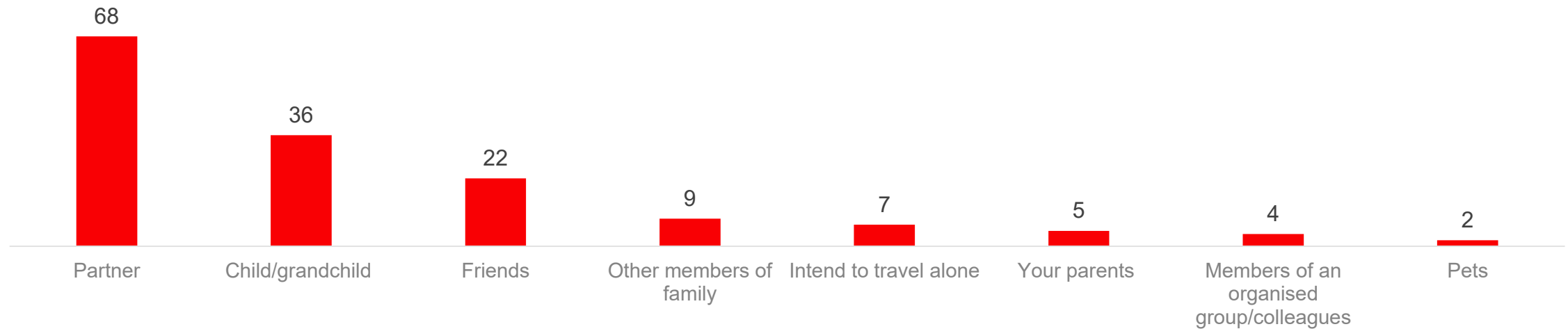
Base: All respondents interested in Wales out of season trip n=409



Make-up of visitor party for out of season Wales trip

- 'A partner' is the most common anticipated accompanying party member for a Wales out of season trip, followed by 'child/grandchildren' and 'friends'.

Figure 68. Visitor party make-up for Wales out of season trip, Percentage, All respondents open to out of season Wales trip



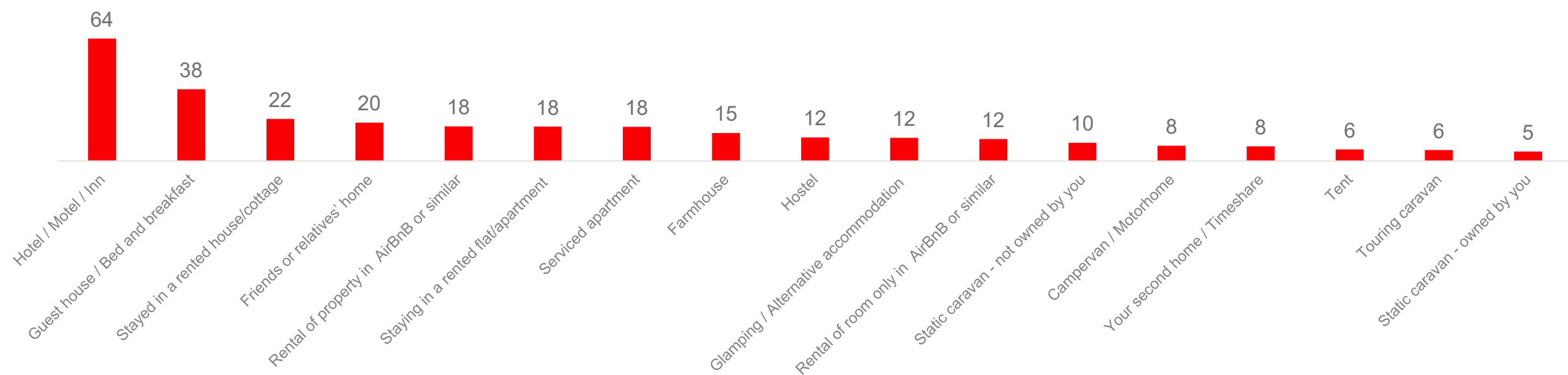
F12. Who, if anyone, would you be most likely to travel with on an out of season holiday/short break in Wales?

Base: All respondents interested in Wales out of season trip n=409

Type of accommodation for a Wales out of season trip

- ‘Out of season’ Wales intenders would be most likely to stay in a ‘hotel/motel/inn’, followed by a ‘guest house/B&B’ and a ‘rented house/cottage’.

Figure 69. Accommodation choice for Wales out of season trip, Percentage, All respondents open to out of season Wales trip



F13. What type/s of accommodation would you be most likely to stay in on an out of season holiday/short break in Wales?

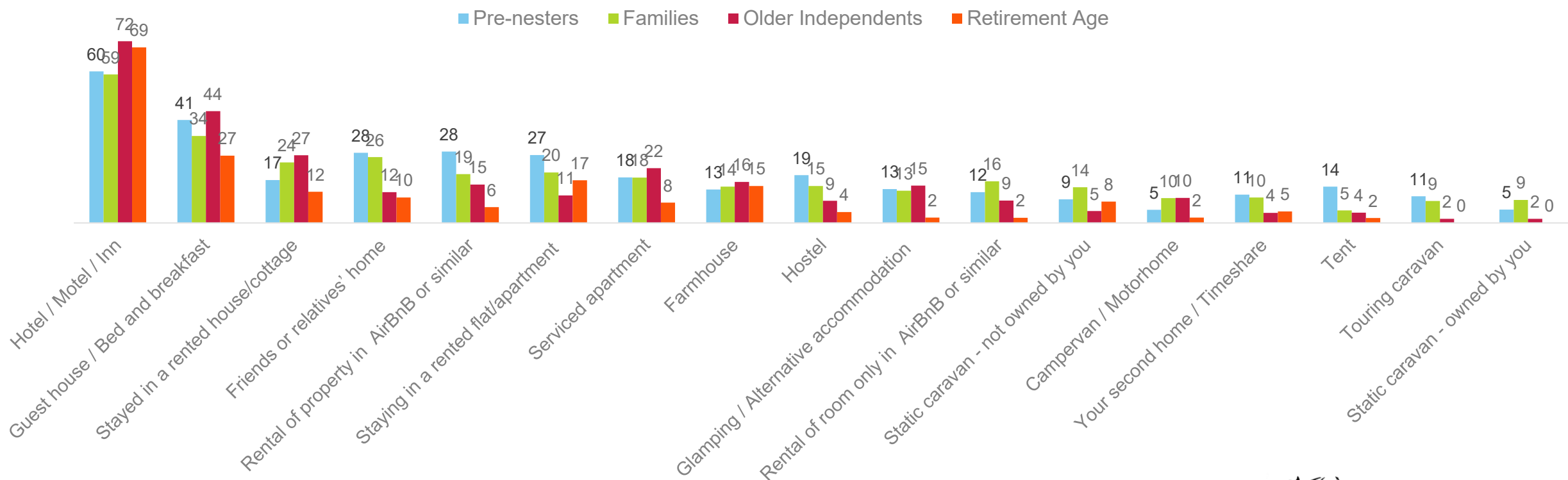
Base: All respondents interested in Wales out of season trip n=409



Type of accommodation for a Wales out of season trip – by life stage

- Older life stages are more likely to stay in serviced accommodation, in particular hotels on a Wales out of season trip. Pre-nesters and families index higher on a number of different accommodation types, particularly a ‘friends or relatives home’ and those relating to self-catering rental and camping/caravans.

Figure 70. Accommodation choice for Wales out of season trip by life stage, Percentage, All respondents open to out of season Wales trip

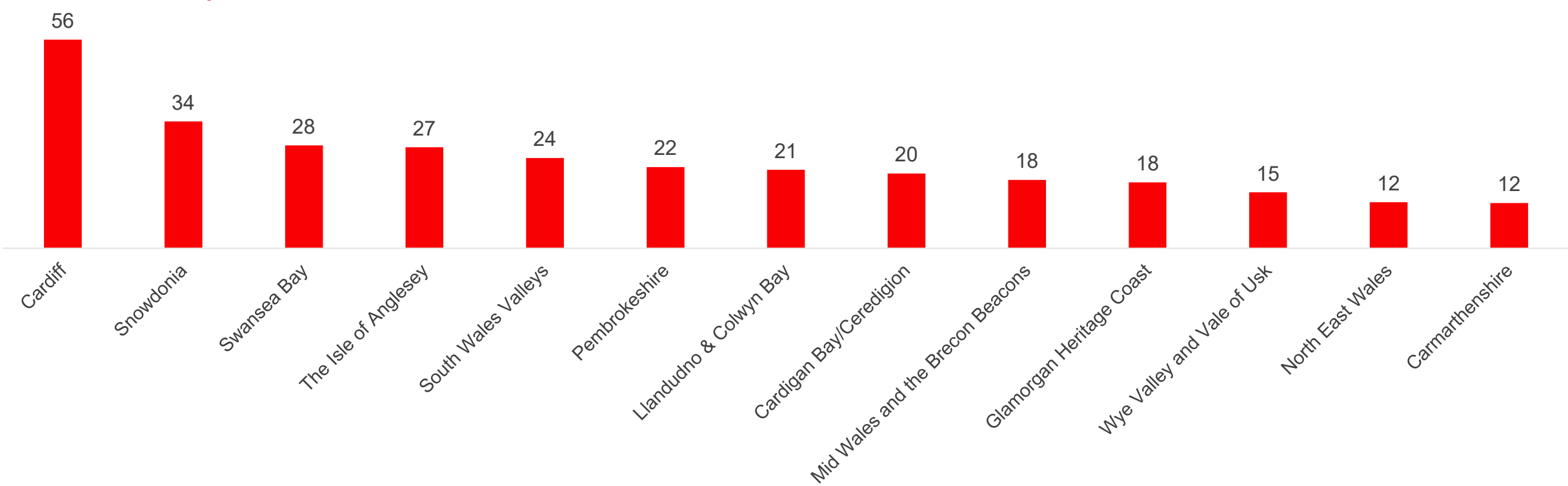


F13. What type/s of accommodation would you be most likely to stay in on an out of season holiday/short break in Wales?
Base: All respondents interested in Wales out of season trip Pre-nesters n=76; Families n=159; Older Independents n=126; Retirees n=48

Anticipated destination for Wales out of season trip

- Consistent with familiarity and previous visit levels, Cardiff is regarded as the most appealing destination for a Wales out of season trip, followed by Snowdonia, and Swansea Bay.

Figure 71. Anticipated destination for Wales out of season trip, Percentage, All respondents open to out of season Wales trip



F14. Which, if any, of these areas would you be most interested in visiting on an out of season short break/holiday in Wales?
Base: All respondents interested in Wales out of season trip n=409

Trip length and time of week

- Over half (56%) of those open to an out of season Wales trip, would anticipate it being a ‘short break of 1-3 nights’; just under 2 in 5 (37%) a longer break of 4+ nights.
- A long weekend trip (Friday to Monday) is the preferred time of taking the trip (44% stating this), although over a third (35%) would anticipate taking a trip mid-week.

Figure 72. Anticipated length of out of season trip, Percentage, All respondents open to out of season Wales trip

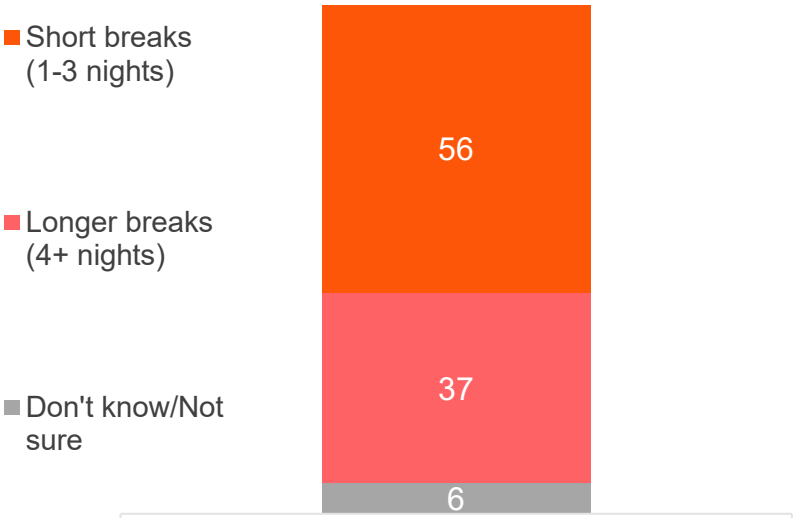


Figure 73. Anticipated time of week for out of season Wales trip, Percentage, All respondents open to out of season Wales trip



F15. Would you anticipate an out of season trip in Wales being a short break (1-3 nights) or a holiday (4+ nights)?

F16. And which time/s of week would you be most likely to take an out of season short break/holiday in Wales?

Base: All respondents interested in Wales out of season trip n=409

Trip length and time of week – by life stage

- ‘Pre-nesters’, families and ‘older independents’ are most likely to take a short break on an out of season trip, although trip length increases with age, to the point where retirees favour a longer trip of 4+ nights.
- Retirees index significantly higher on ‘mid-week’ trips and lower on ‘long weekends’ – the latter favoured by pre-nesters and families.

Figure 74. Anticipated length of out of season trip by life stage, Percentage, All respondents open to out of season Wales trip

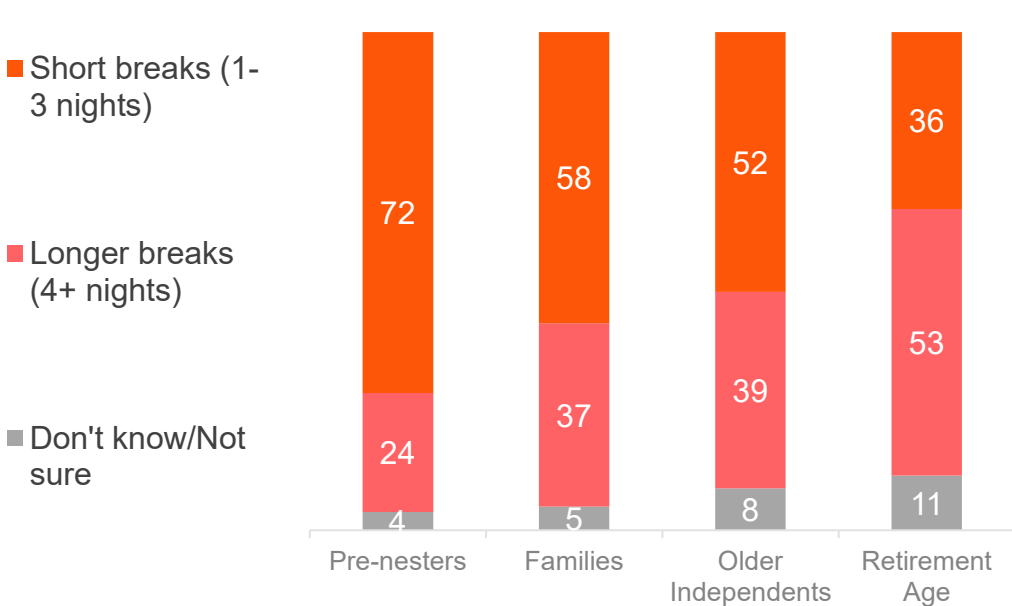
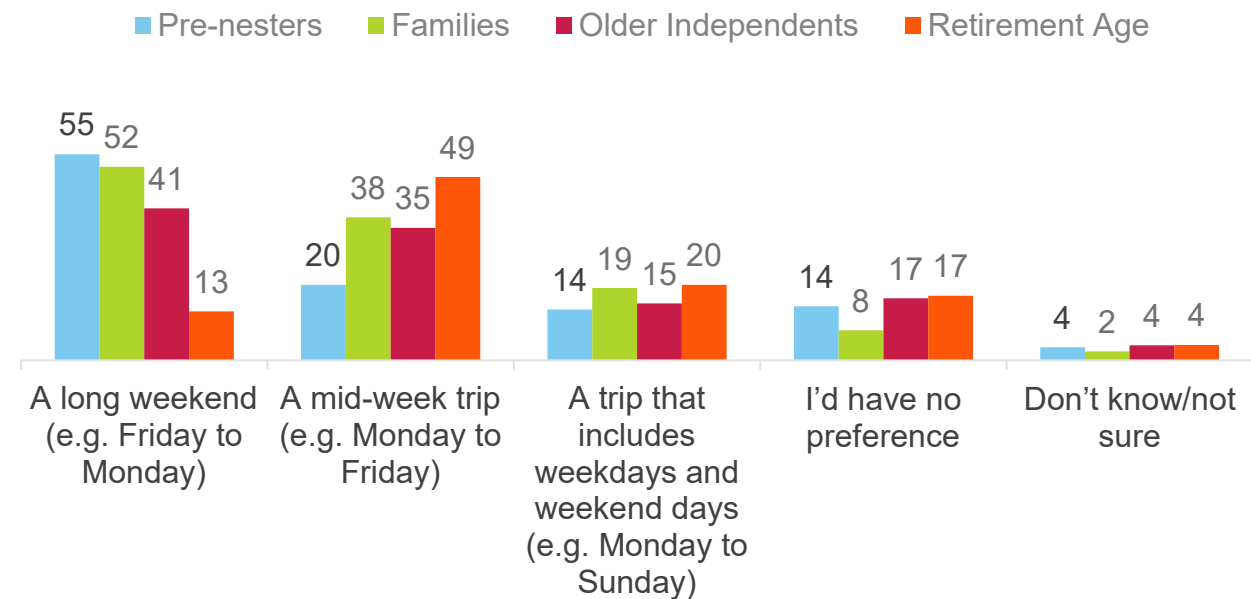


Figure 75. Anticipated time of week for out of season Wales trip by life stage, Percentage, All respondents open to out of season Wales trip



F15. Would you anticipate an out of season trip in Wales being a short break (1-3 nights) or a holiday (4+ nights)?
F16. And which time/s of week would you be most likely to take an out of season short break/holiday in Wales?
Base: All respondents interested in Wales out of season trip Pre-nesters n=76; Families n=159; Older Independents n=126; Retirees n=48

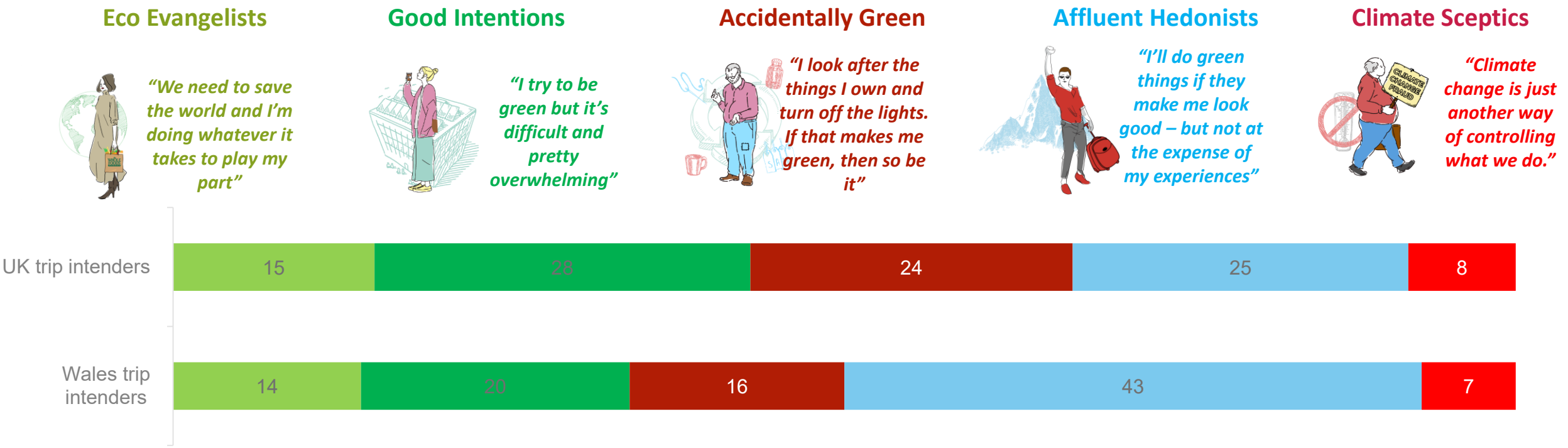
Understanding Attitudes to Sustainability



Breakdown of BVA BDRC sustainability segments

- Wales trip intenders index above average on 'Affluent Hedonists' – a segment that signals interest in green issues, but doesn't follow through with any 'green actions' and prioritises experiences (43% compared to 25% on average).

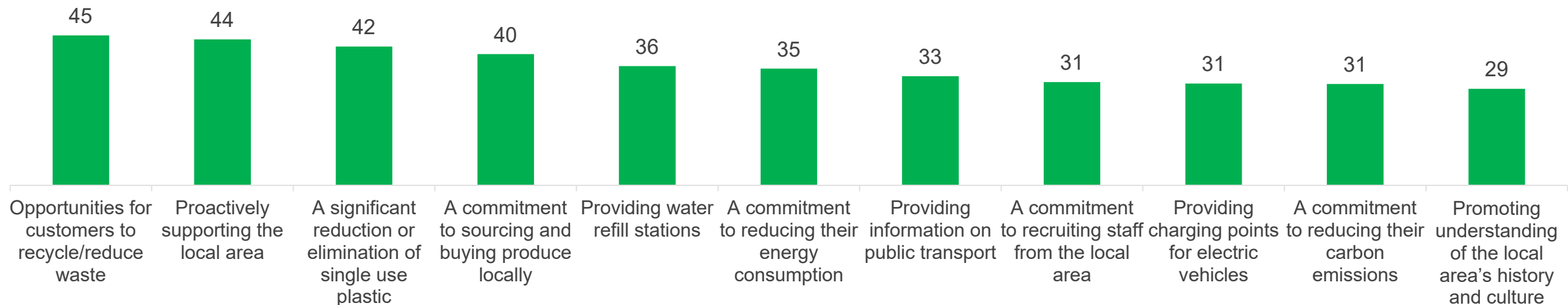
Figure 76. Breakdown of Wales intenders by BVA BDRC sustainability segments



Sustainable actions tourism businesses should prioritise

- There are a wide range of sustainable actions that UK trip intenders believe tourism businesses should prioritise.
- ‘Opportunities for recycling or reducing waste’, ‘proactively supporting the local area’, a ‘reduction of single use plastic and a ‘commitment to sourcing or buying local produce’ are the top priorities UK trip intenders think tourism businesses should prioritise to become more sustainable.

Figure 77. Sustainable actions tourism businesses should prioritise, Percentage Top 11, All respondents



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?

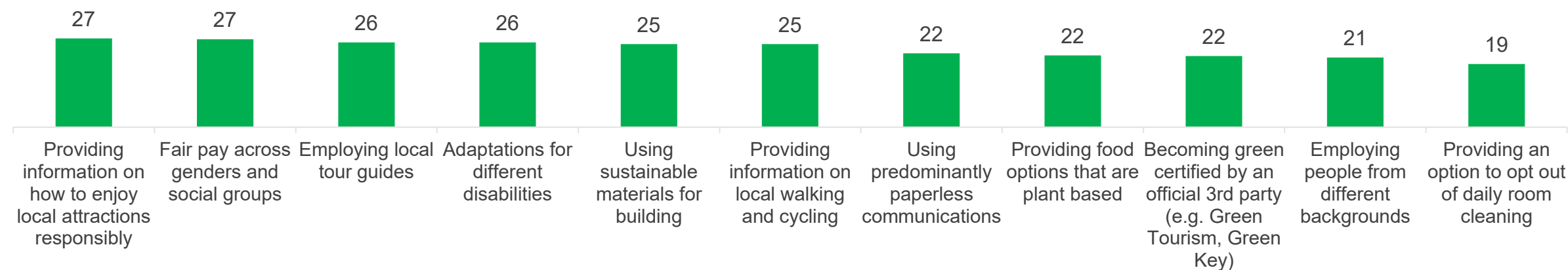
Base: All respondents n=604



Sustainable actions tourism businesses should prioritise

- ‘Providing an option to opt out of daily room cleaning’ and ‘employing people from different backgrounds’ are regarded as lower priorities for tourism businesses.

Figure 78. Sustainable actions tourism businesses should prioritise, Percentage, Bottom 11, All respondents

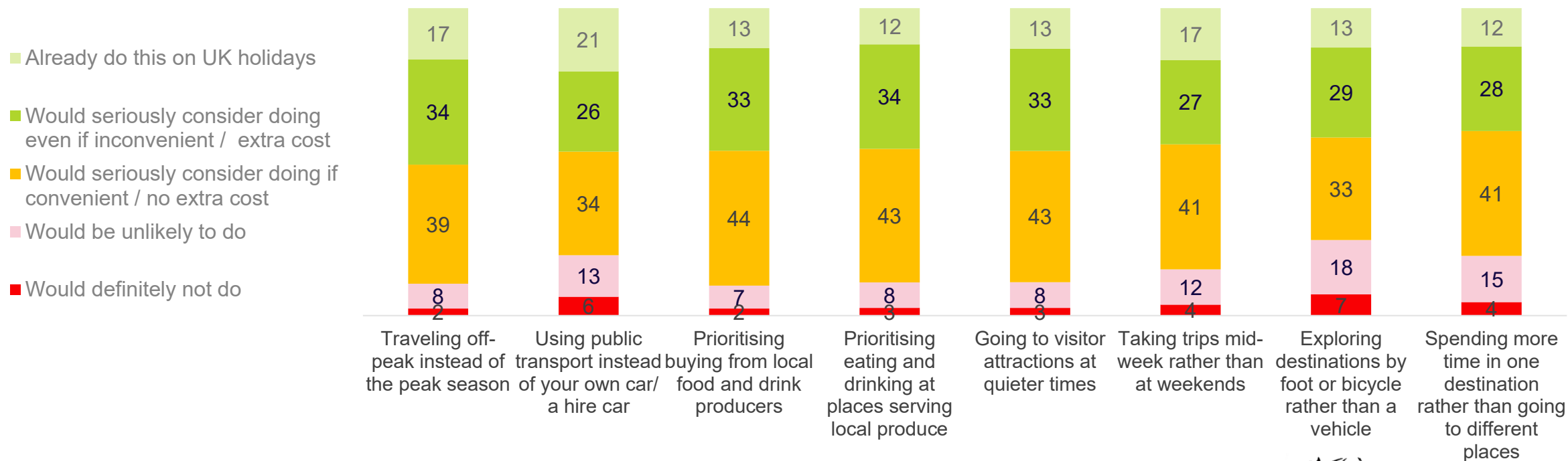


G7.Which, 3-4 of the following actions do you believe are most important for tourism businesses to take to become more sustainable? G8.And which 3-4 of these actions do you believe are most important for tourism businesses to take to become more sustainable?
Base: All respondents n=604

Attitudes to individual sustainable actions on domestic trips

- There is widespread support for a range of sustainable actions that visitors could take, although only a minority state they already do these on holiday.
- UK trip intenders are most likely to ‘already do’ or ‘would seriously consider’ ‘travelling off-peak instead of the peak season’, ‘using public transport’ and ‘prioritising buying from local food and drink producers’

Figure 79. Attitude to individual sustainable actions, Percentage, By All respondents Top 8, All respondents



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

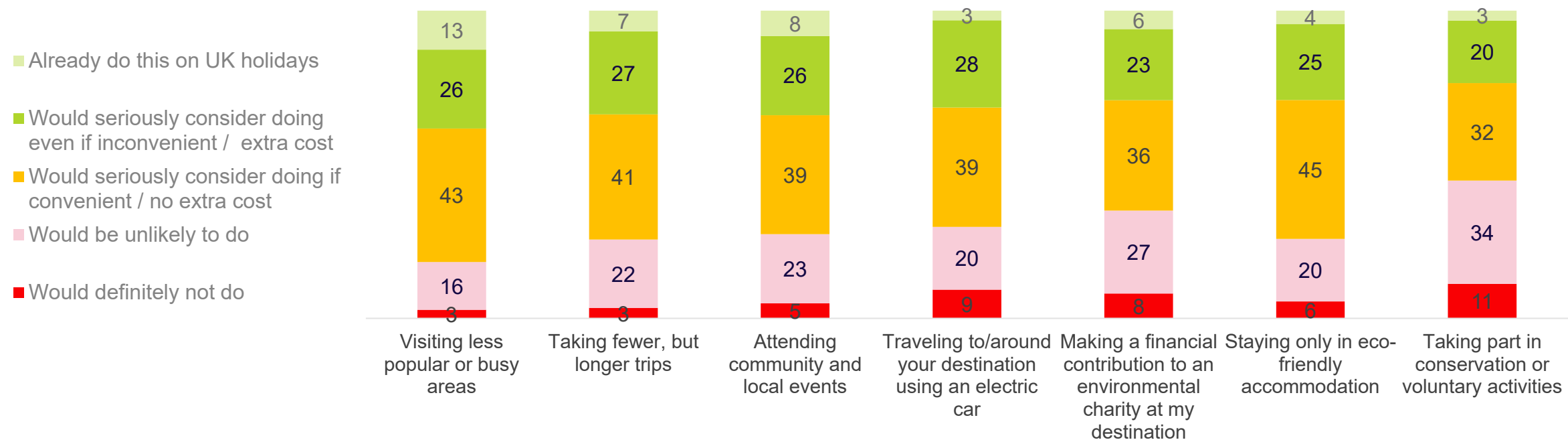
Base: All respondents n=604



Attitudes to individual sustainable actions on domestic trips

- ‘Taking part in conservation or voluntary activities’ and ‘staying only in eco-friendly accommodation’ are the individual sustainable actions UK trip intenders are least likely to consider doing, although there remains support for them.

Figure 80. Attitude to individual sustainable actions, Percentage, By All respondents Bottom 8, All respondents



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 respondents n=604



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 (604)	+/- 1.7%	+/- 3.2%	+/- 4.0%
Out of season Wales intenders (409)	+/- 2.1%	+/- 3.9%	+/- 4.8%