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Analysis for Policy

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Visit Wales Tourism Market Demand Report –UK June 2022

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Full Research Report: Visit Wales Market Demand Report -UK
Cardiff: Welsh Government, GSR report number 56/2022 .

Available at: <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 UK Market and broadly looks at:

- The factors influencing domestic holiday and short break choice
- Types of destination and experiences favoured on domestic holidays and short breaks
- 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

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

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

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

There were 1,151 completed surveys. The first 1,000 responses were nationally representative of the UK's domestic holiday-taking population. A boost of 150 surveys were then conducted amongst residents from Wales. The data was then weighted to be representative of the UK's domestic holiday-taking population, ensuring comparability to previous studies. Data was weighted by gender, age, social grade and region of residence.

The survey took 25 minutes to complete on average.

Where possible, comparisons are made to 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.

Key findings



Key findings (1)

Trip Preferences

1. 'Traditional seaside resorts', 'scenic coastline and harbours' and 'cities and large towns' are the destination types the UK holiday market are most likely to take a UK short break/holiday to in the next 12 months – nearly half planning to take a trip to each. 'Historic and heritage towns' and 'scenic countryside and villages' are the next most popular, generating consideration from 2 in 5.
2. Finances continue to play an important role in trip choice. 'Great value for money' is the number one destination influence for domestic holidays/short breaks in the next 12 months. Whilst 'great value for money' does not necessarily mean 'low cost trips', with two thirds of the UK holiday market stating they have either been 'hit hard' by the cost of living crisis or 'have to be careful', and costs cited as a leading barrier to visiting Wales, it's likely lower cost trips will also be favoured.
3. 'Ease of travel to and getting around the destination' is the next most important influence for the UK holiday market, meaning that the top two reasons are both practical rather than 'product-based'. Beyond these practical factors, 'incredible landscapes and scenery', 'high quality accommodation' and 'a destination rich in history and heritage' are the next most important. Notably, 'high quality accommodation' is the only influence to have significantly increased since 2020, potentially linked to changes in accommodation expectations following the pandemic.
4. 'Trying local food and drink' and 'visiting outdoor visitor attractions' are the experiences the UK holiday market are most likely to do on a UK holiday or short break, followed by 'visiting heritage sites/cultural attractions' and 'walking, hiking or rambling'

Destination relationships and associations

1. Around 3 in 5 of the UK holiday market have taken a short break or holiday in Wales previously and intend to do so again, with only 15% having never taken an overnight trip there and wanting to do so, and just 16% never intending to do so.
2. Familiarity with Wales as a destination is relatively comparable to other UK destinations measured, although it's worth noting that over half of the UK market only know Wales 'a little/not at all well', rising to 3 in 5 amongst residents outside regions that do not neighbour the Welsh border.
3. Whilst the West Country (Cornwall and Devon) generated the highest proportion of trips in 2020 to 2021, Wales has recorded a relatively high volume of trips this year, driven by residents from Wales, North West England and the West Midlands.

Key findings (2)

4. Despite reporting comparable previous visits to 'competitor destinations', Wales is the 4th most recommended destination for a holiday or short break (of the five tested), sitting behind the West Country, The Lake District and Scotland. That said, amongst 'scenic explorer couples', 'pre-family explorers' and 'budget families' (three of Visit Wales' priority segments), Wales is the 2nd most recommended destination.
5. Wales is most likely to be associated with 'scenic countryside and villages' and 'wilderness and nature'. Wales is less likely to be associated with 'modern urban environments' such as 'traditional seaside resorts', 'scenic coastlines and harbours' and 'cities and large towns' – the three most popular destination types overall.
6. In a competitive context, Wales does not generate the highest association for any single destination type. However, it does make the top 2 for 'historic and heritage towns', 'traditional seaside resorts' and 'scenic coastlines and harbours' – albeit significantly below the leading destination for each.
7. Further reinforcing the perception of Wales as a 'rural destination', Wales is most likely to be associated with 'incredible scenery and landscapes' and as 'a destination rich in history and heritage' with 'famous landmarks and visitor attractions' and 'great places to explore off the beaten track'.
8. Positively, however, Wales has the highest 'competitive association' with the top two most important destination influences – for being a destination which is 'great value for money' and for 'being easy to travel to and get around' – albeit only just ahead of other areas. With concerns around the 'cost of living crisis' likely to increase, Wales' perception as a 'good value' destination is likely to position it well in the coming months.
9. In terms of experiences, Wales' perception as an 'outdoor and heritage' destination is further reinforced – 'walking, hiking or rambling', 'exploring scenic areas by car' and 'learning about local history and culture' the leading associations. Again, perhaps notably, Wales is the only 'non-Mainland UK' destination to not receive a 'number one' association with holiday experiences in the competitive context.

Key findings (3)

Future visits to Wales in the next 12 months

1. 1 in 4 (24%) of the UK domestic holiday market (which in itself is 15% of the UK population) claim to have taken a short break or holiday in Wales so far in 2022 (between January and June), with 26% stating they have either already booked or will definitely take a Wales trip in the next 12 months, residents of Wales, the North West of England and the West Midlands exhibiting the strongest desire to do so.
2. Wales trip intenders are most likely to be planning their Wales trip in August or September, family segments indexing higher in August, non-family segments generally higher in September.
3. Further underlining the role of financial factors in influencing trip choice, 'the cost of fuel' is the number one reason the UK holiday market are not planning a holiday or short break in Wales, with 'rising costs of holiday/leisure' the third leading reason and 'personal finances' fourth. Around 1 in 4 (26%) are cutting back on UK trips generally, with 1 in 6 (17%) still nervous about travelling due to COVID-19.

Interest in out of season short breaks and holidays in Wales

1. There appears to be a strong appetite for Wales out of season overnight trips – over half of the UK market are 'very open' to taking one. However, interest is strongest closer to the warmer summer months, dropping significantly between November and February.
2. Those who are open to a trip at this time of year cite finances and peaceful enjoyment of the environment as key reasons for this appeal. 'Accommodation is cheaper' is the number one reason. 'Fewer people at destinations' and 'I prefer the peace and quiet' making up the remainder of the top 3. For 1 in 3, 'the changing scenery' is an appealing factor.
3. Enjoying seasonal celebrations and events, seasonal food and drink and city breaks currently have lower appeal for out of season visits to Wales, rather than enjoying the more peaceful outdoor environment, possibly linked to these being less associated with Wales.
4. 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 – over half stating this, followed by 'shorter days and nights' and 'fewer school holidays' (driven by families).
5. 'Scenic countryside and villages' is the destination UK holiday-makers would be most interested in visiting Wales out of season, significantly above the next most preferred - 'historic and heritage towns' – aligning with Wales' highest destination type associations.

Key findings (4)

5. The experiences that are regarded as most interesting on a Wales out of season holiday/short break, align relatively closely with the UK holiday market's most preferred experiences generally – 'trying local food and drink', 'walking, hiking or rambling', 'visiting heritages sites' and 'visiting outdoor visitor attractions' in the top 4 for both.
6. There is a high level of potential interest in attending festivals on a Wales out of season trip – 'local produce/arts/crafts events' the most appealing followed by 'food and drink festivals' and 'agricultural/countryside/garden shows'. 'Sports events' appeal the least, although there is still interest from around 1 in 10.
7. 'Out of season' trip-takers to Wales would be most likely to stay in a 'hotel/motel/inn', followed by a 'guest house/B&B' and a 'rented house/cottage'.
8. Relatively similar to other times of the year, Snowdonia is regarded as the most appealing destination for a Wales out of season trip, followed by Cardiff, Llandudno & Colwyn Bay and Pembrokeshire.
9. Around half of those open to an out of season Wales trip, would anticipate it being a 'short break of 1-3 nights', over 2 in 5 a longer break of 4+ nights.
10. A mid-week trip (Monday to Friday) is the preferred time of taking the trip (42% stating this), although only a slightly smaller proportion (37%) favour a long weekend.

Key findings (5)

Attitudes to sustainability

1. Reducing/recycling waste and supporting the local area are the two main priorities the UK holiday market think tourism businesses should prioritise to become more sustainable, followed by 'significantly reducing single-use plastic' and 'sourcing produce locally'. There is also support for a range of other initiatives including 'providing water refill stations' and 'a commitment to reducing energy consumption'.
2. 'Employing local tour guides' and 'providing an option to opt out of daily room cleaning' are regarded as lower priorities for tourism businesses. Notably, 'accreditation' is also at the bottom end of the priority list.
3. In terms of sustainable actions for the individual, the UK holiday market are most likely to already do/or would seriously consider are 'travelling off-peak instead of the peak season', 'going to visitor attractions at quieter times' and 'visiting less popular or less busy areas'.
4. 'Taking part in conservation or voluntary activities' and 'travelling to/around a destination using an electric car' are the individual sustainable actions the UK holiday market are least likely to consider doing, although there remains majority support for them.
5. In terms of sustainability segments, Wales trip-takers index above the UK population on 'Eco Evangelists' (13% compared to 9% in the population) and 'Green Signalling Hedonists' – a segment that signals interest in green issues, but don't follow through with any 'green actions' and prioritise experiences (45% compared to 32% in the population).

Demographics of the domestic holiday market



Gender and life stage of the domestic holiday market

- The gender split of the domestic holiday market is relatively even, 'families' are the largest life stage. 'Pre-nesters' are by far the smallest life-stage within the domestic holiday market, making up just 13%, with those of 'retirement age' making up 23%.

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

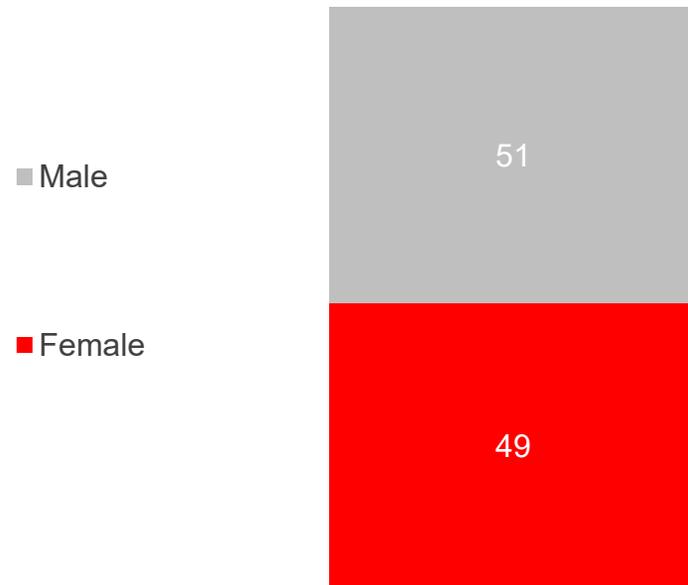
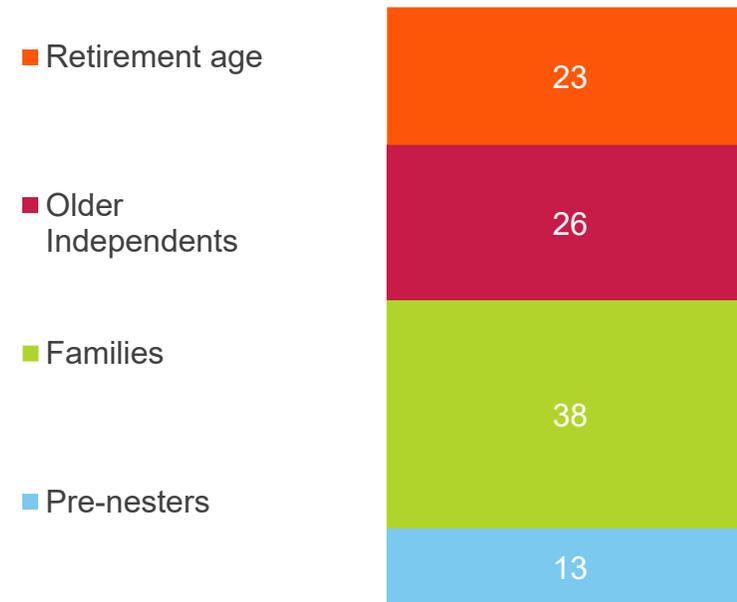


Figure 2. Life stage of respondents, Percentage, All respondents



Employment status and social grade of the domestic holiday market

- Around half (48%) of the domestic holiday market is in full-time employment, with a further 1 in 7 employed part-time. Around 1 in 5 (22%) are retired. The majority (61%) of the domestic holiday market fall into social grades ABC1.

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

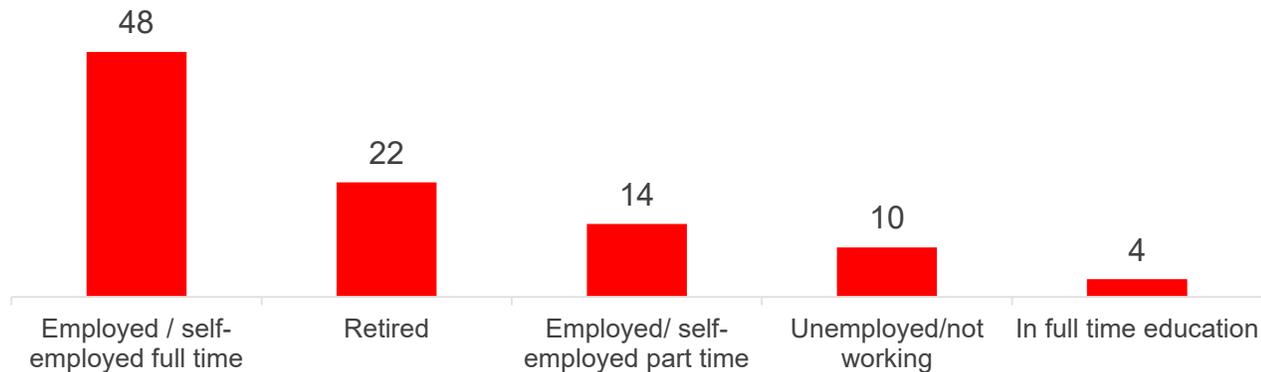
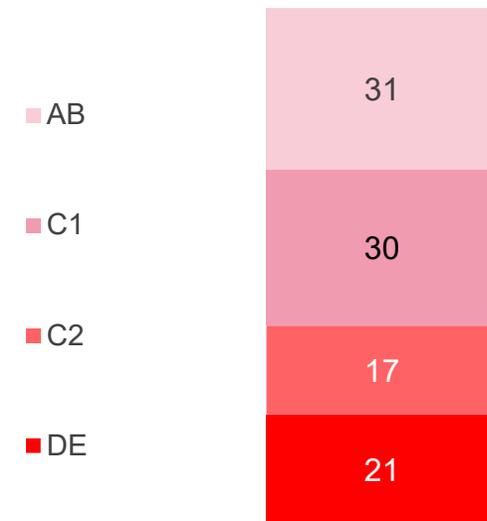


Figure 4. Social grade of respondents (weighted), Percentage, All respondents



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

Base: All respondents n=1,146

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

- Two thirds (67%) of the domestic holiday market have either been 'hit hard' by the cost of living crisis so far, or 'are ok but have to be careful'. Only a third believe they will not be negatively impacted.
- Visit Wales 'priority segments' make up around a third (36%) of the domestic holiday market.

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

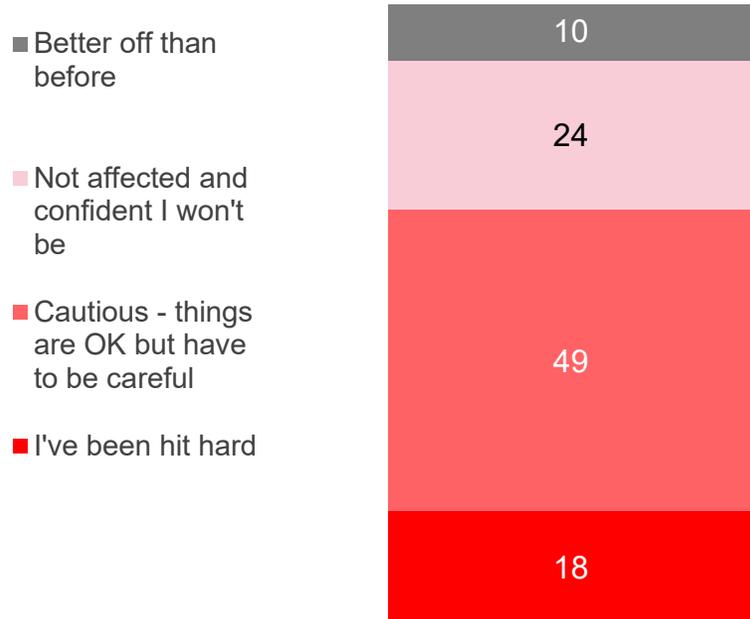
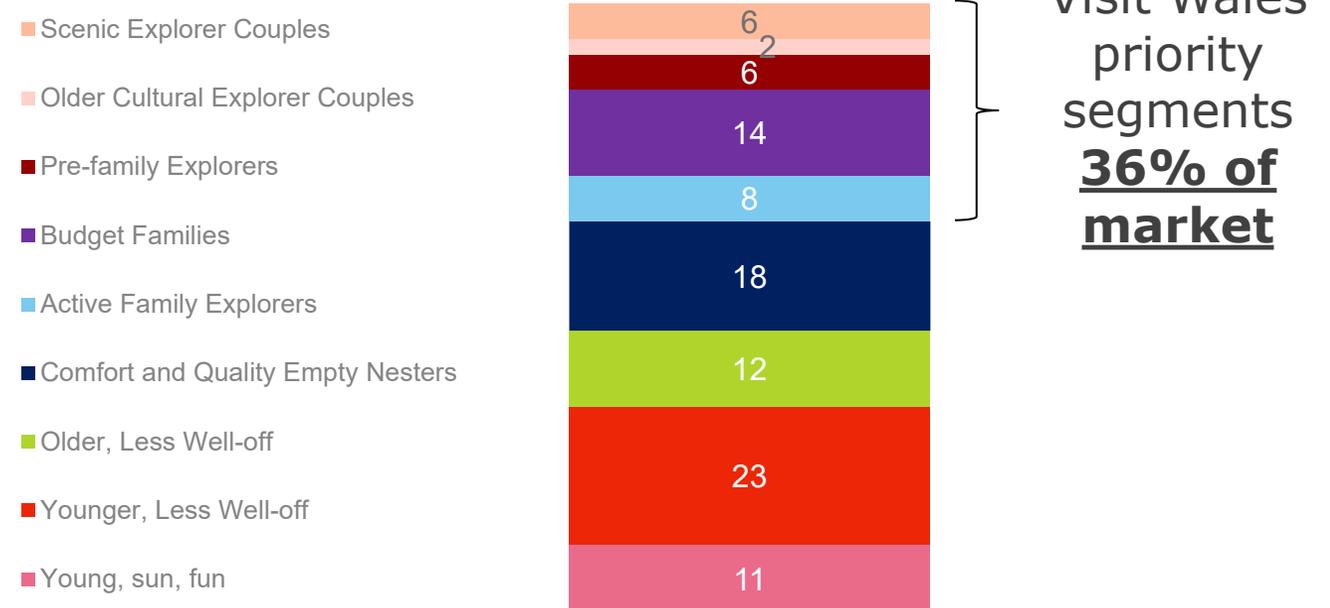


Figure 6. Visit Wales Segment of respondents, Percentage, All respondents



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=1,146

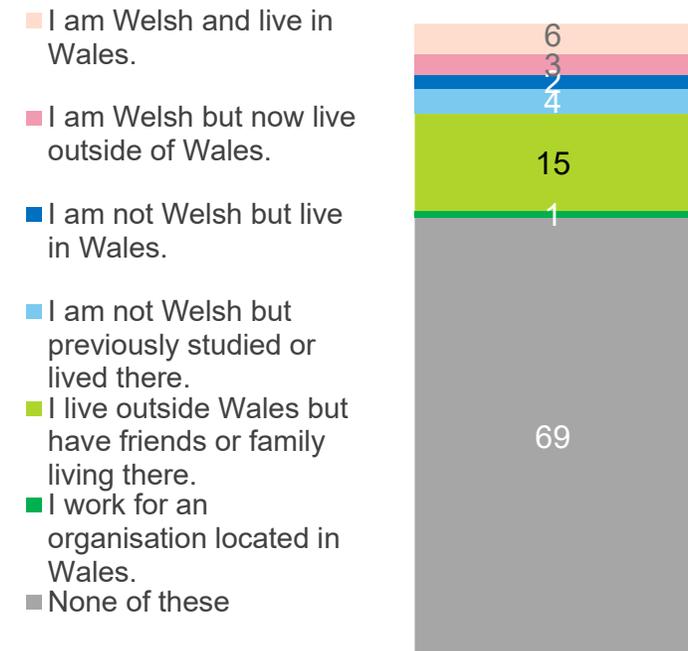
Region of residence and relationship with Wales

- The region of residence of the domestic holiday market broadly replicates the UK population, 'the South East of England', 'London/Greater London' and the 'North West of England', with the highest representation.
- Around 3 in 10 (31%) have some sort of existing ties to Wales, 'having family and friends who live there', the most dominant with 15% falling into this category.

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



Figure 8. Relationship with Wales, Percentage, All respondents



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

Base: All respondents n=1,146

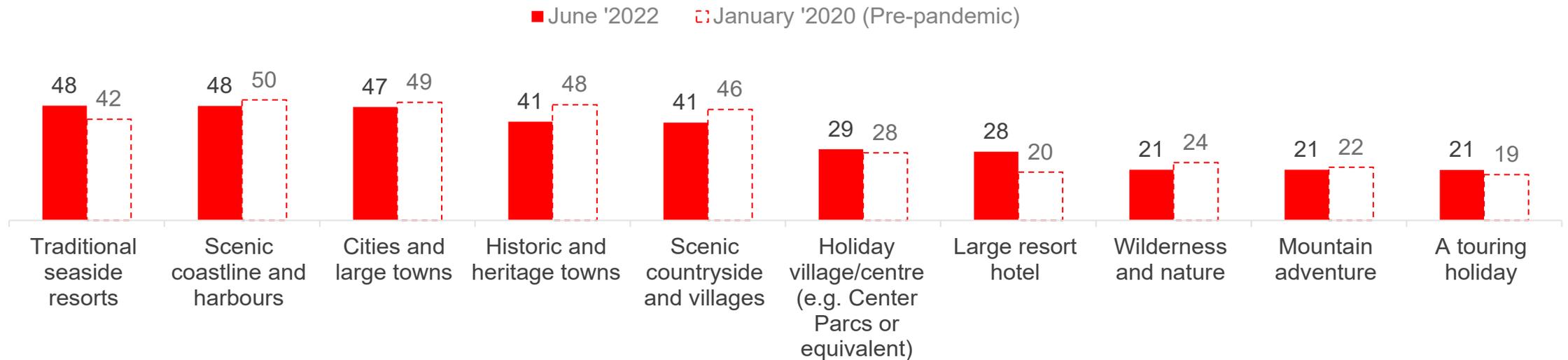
Trip preferences



Destination types seriously considering for a UK overnight trip*

- ‘Traditional seaside resorts’, ‘scenic coastline and harbours’ and ‘cities and large towns’ are the destination types where the domestic holiday market are most likely to be ‘seriously considering’ a UK holiday/short break in the next 12 months – almost half considering each. ‘Historic or heritage towns’ and ‘scenic countryside and villages’ also generate strong consideration from around 2 in 5.
- There are some small differences with the January 2020 research, although these are likely to be seasonal – summer destination types such as ‘traditional seaside resorts’ and ‘large resort hotels’ likely to be more front of mind in June, compared to January.

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



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

Base: All respondents n=1,146

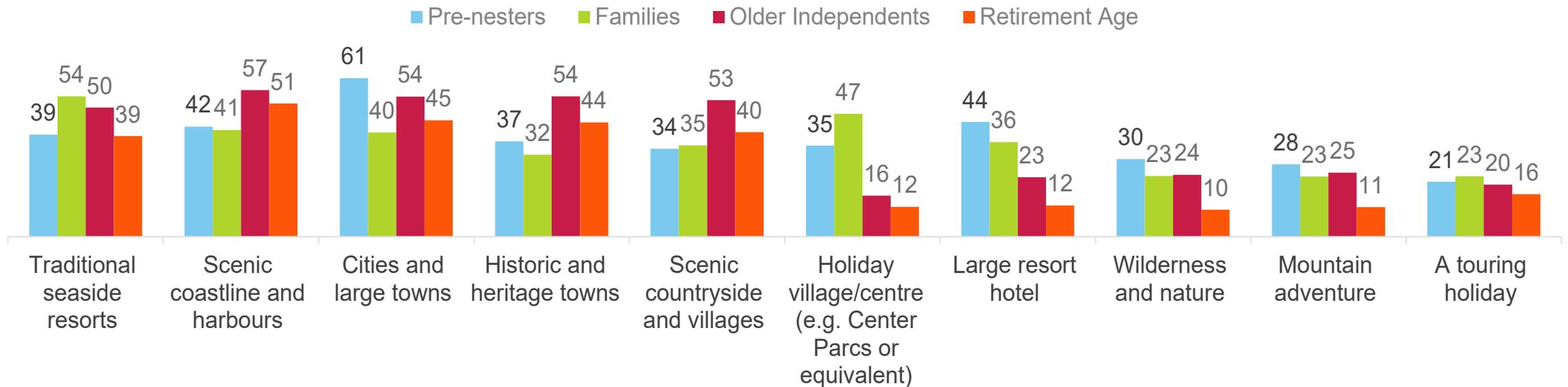
*Note: Differences with 2020 may be seasonal with summer destination types being more front of mind in the later 2022 research



Destination types seriously considering – by life stage

- There is some variation in destination type preference by life stage. For 'pre-nesters', 'cities and large towns' and 'large resort hotels' are the two leading destination types; for families 'traditional seaside resorts' and 'holiday village/centres' lead the way. Both 'older independents' and those of 'retirement age', favour 'scenic coastline and harbours', 'historic and heritage towns' and 'scenic countryside and villages' more than other life stages.

Figure 10. Destination types seriously considering a UK holiday/short break in next 12 months, Percentage, All respondents



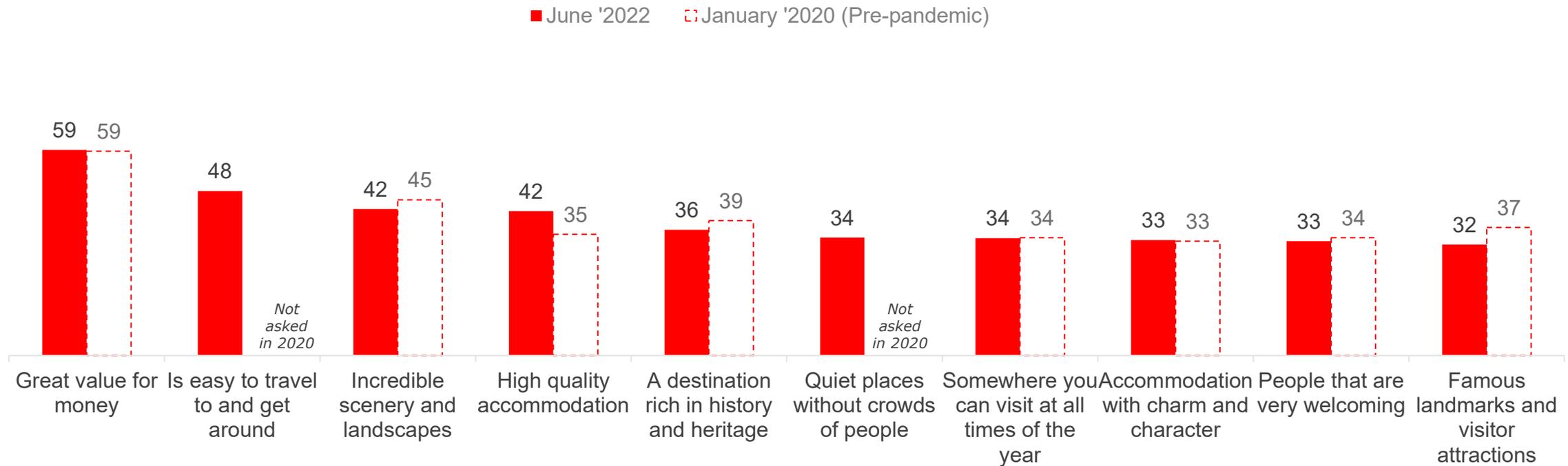
B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next 12 months?

Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226

Destination influences for a UK overnight trip

- ‘Great value for money’ is the leading destination influence for a UK holiday/short break (consistent with 2020), followed by ‘is easy to get to and get around’. Beyond these practical factors, ‘incredible scenery and landscapes’, ‘high quality accommodation’, and ‘a destination rich in history and heritage’ are the next most important influences. ‘Quiet places without crowds’ is also influential, as is ‘somewhere you can visit all times of the year’.
- Results are generally consistent with 2020, although ‘high quality accommodation’ is 7 percentage points more important in 2022.

Figure 11. 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?

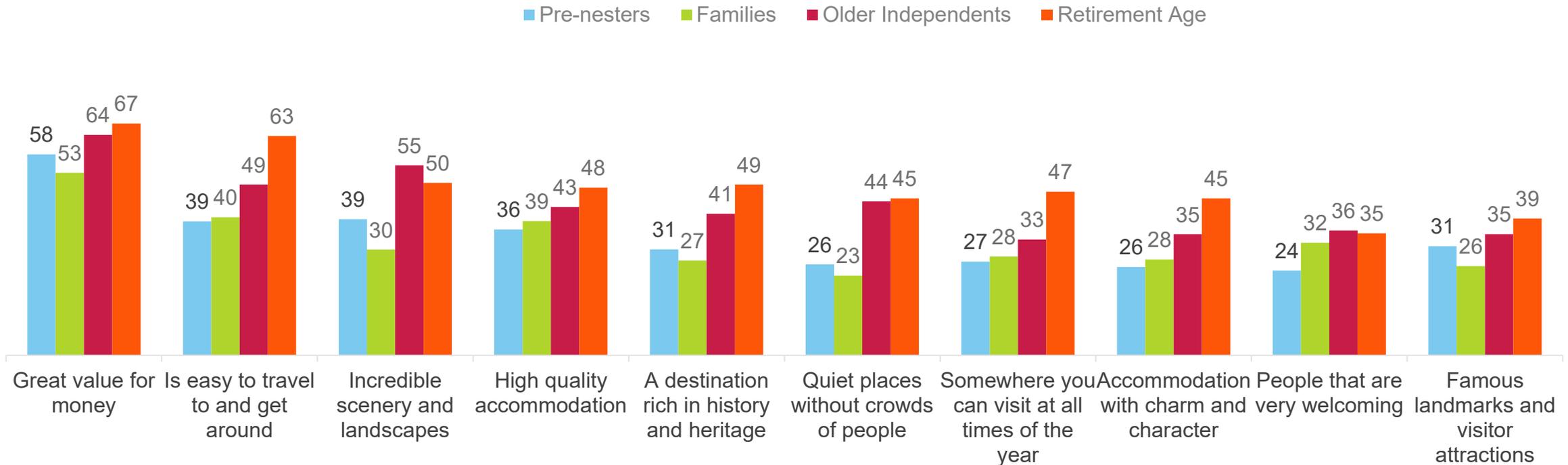
Base: All respondents n=1,146



Destination influences for a UK overnight trip – by life stage

- ‘Great value for money’ is a leading destination influence for all life stages, but other influences differ. ‘Retirees’, and to a lesser extent ‘older independents’, index the highest on the majority of ‘top 10’ influences overall – in particular on ‘ease of travelling to and around the destination’, ‘scenery and landscape’, ‘history and heritage’, ‘high quality accommodation’ and ‘quiet places’.

Figure 12. 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?

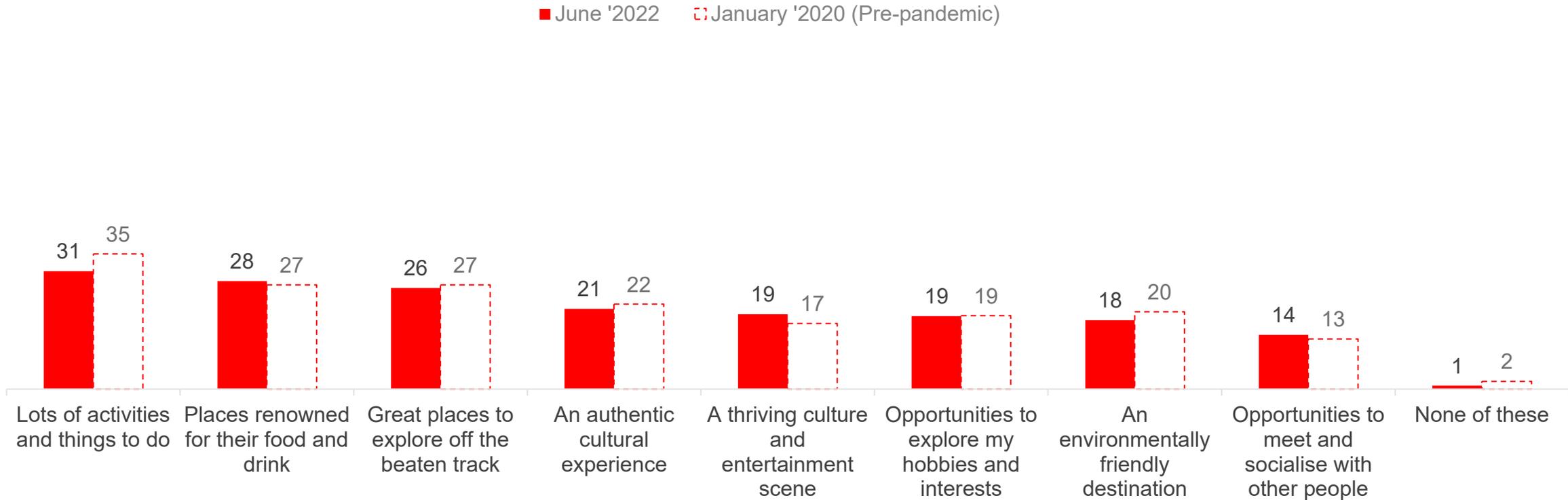
Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226



Destination influences for a UK overnight trip

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

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



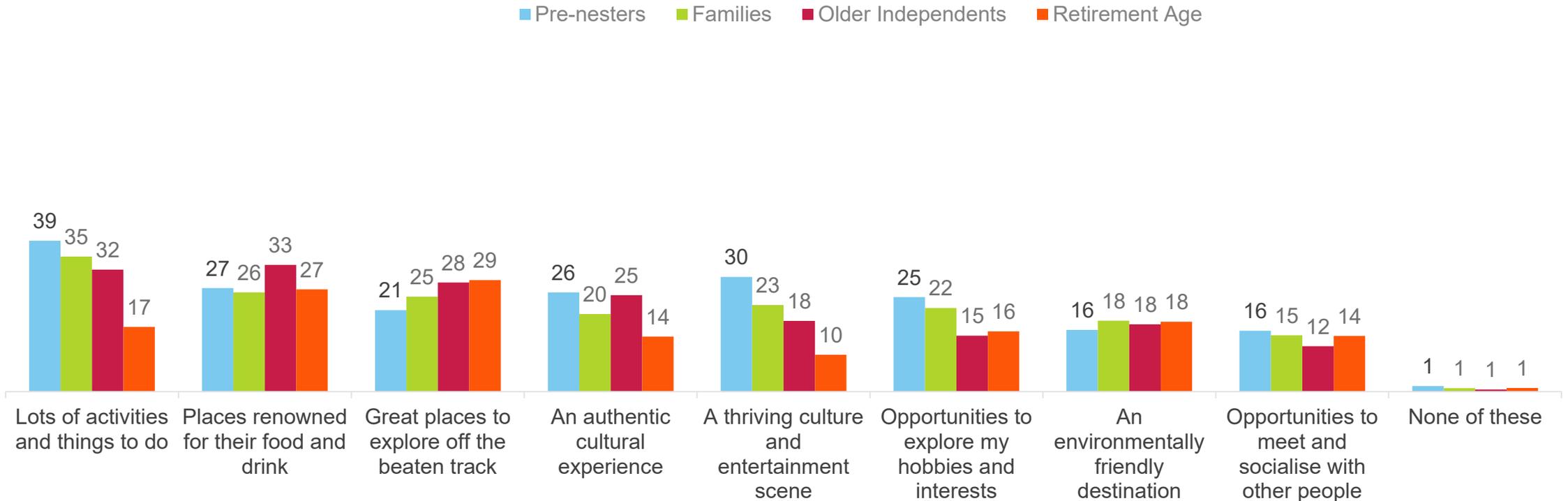
B2. Below are a list of influences people have given for choosing their holidays and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: All respondents n=1,146

Destination influences for a UK overnight trip – by life stage

- Younger life stages and families index relatively high on 'lots of activities and things to do' and 'a thriving culture and entertainment scene'. Older Independents are more likely to be influenced by places renowned for food and drink. Retirees and Older Independents are more influenced by 'great places to explore off the beaten track'.

Figure 14. Destination influences for a UK holiday/short break by life stage, Percentage, Bottom 8, All respondents



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

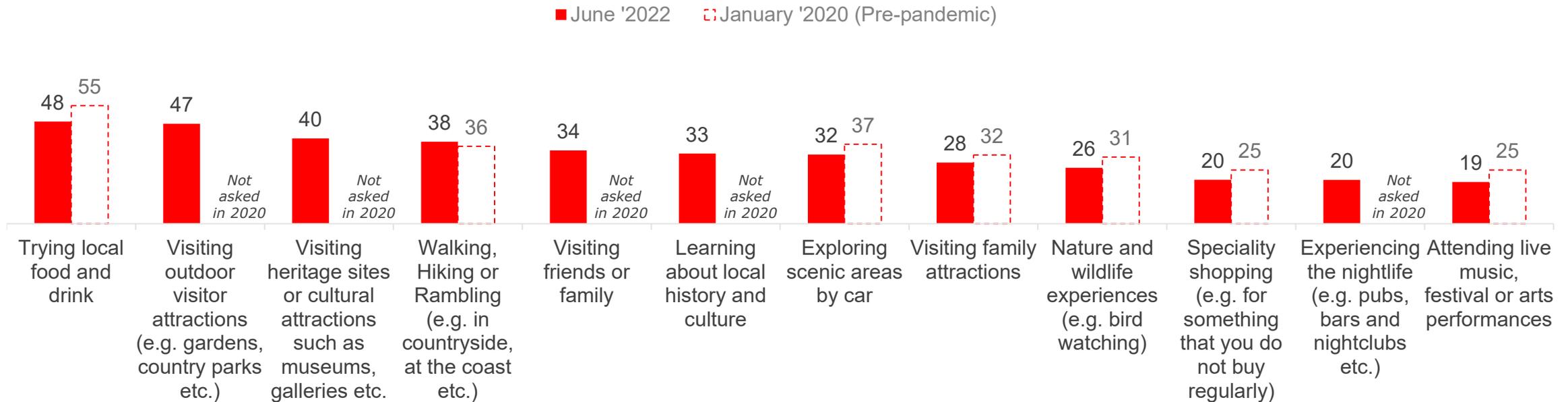
Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226



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

- In terms of experiences, as in 2020, 'trying local food and drink' is what the domestic holiday market would most like to do, followed by 'visiting outdoor visitor attractions' and 'visiting heritage sites or cultural attractions'. 'Walking, hiking or rambling' also makes the top four.

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



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

Base: All respondents n=1,146

*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



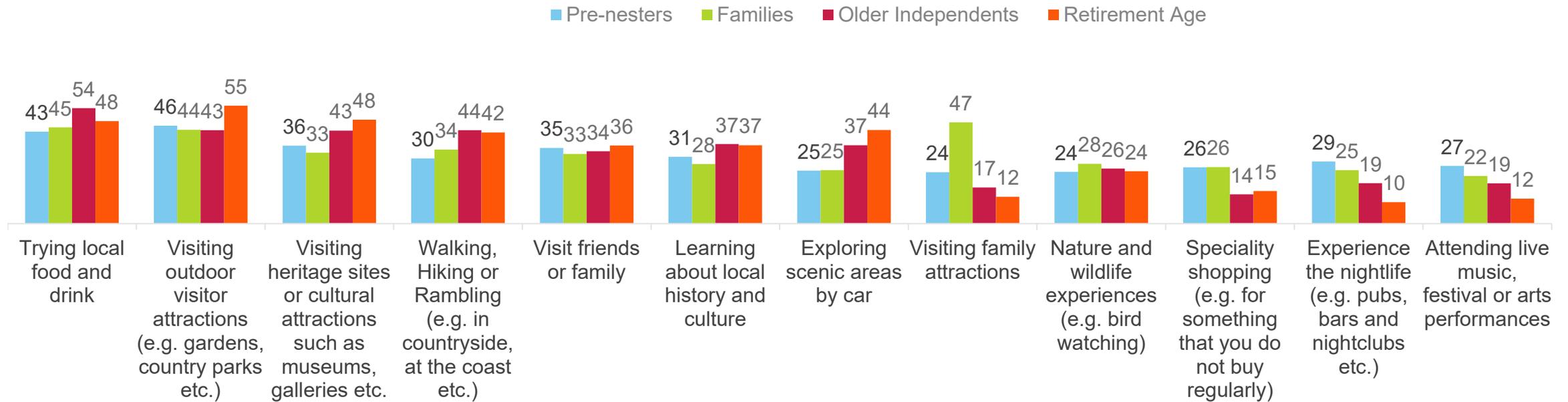
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Experiences would most like to do – by life stage

- There are some differences in the leading preferred experiences by life stage. Most notably, ‘retirees’ index highest on interest in ‘visiting outdoor attractions’, as well as ‘visiting heritage sites or cultural attractions’ and ‘exploring scenic areas by car.’ 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, festival or arts performances’

Figure 16. Experiences would most like to do on a UK holiday/short break by life stage, Percentage, Top 12, All respondents



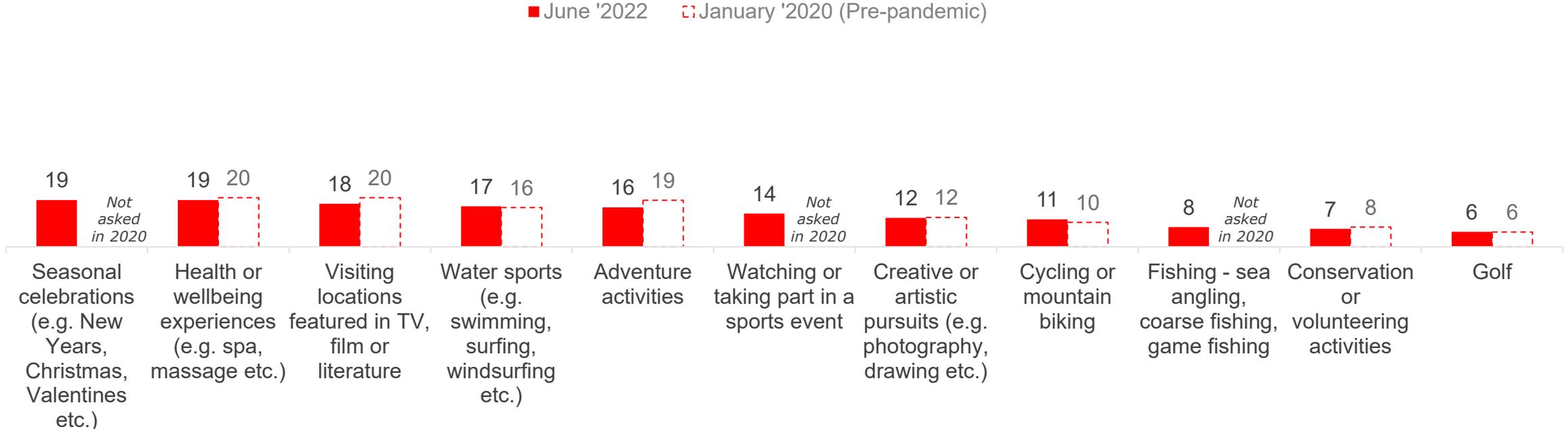
B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next 12 months?

Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226

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

- Seasonal celebrations and health or wellbeing experiences are likely to be undertaken by around 1 in 5 UK holiday takers.
- Activities such as 'golf', 'conservation or volunteering' and 'fishing' are least likely to be conducted on a holiday or short break in the UK.

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



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

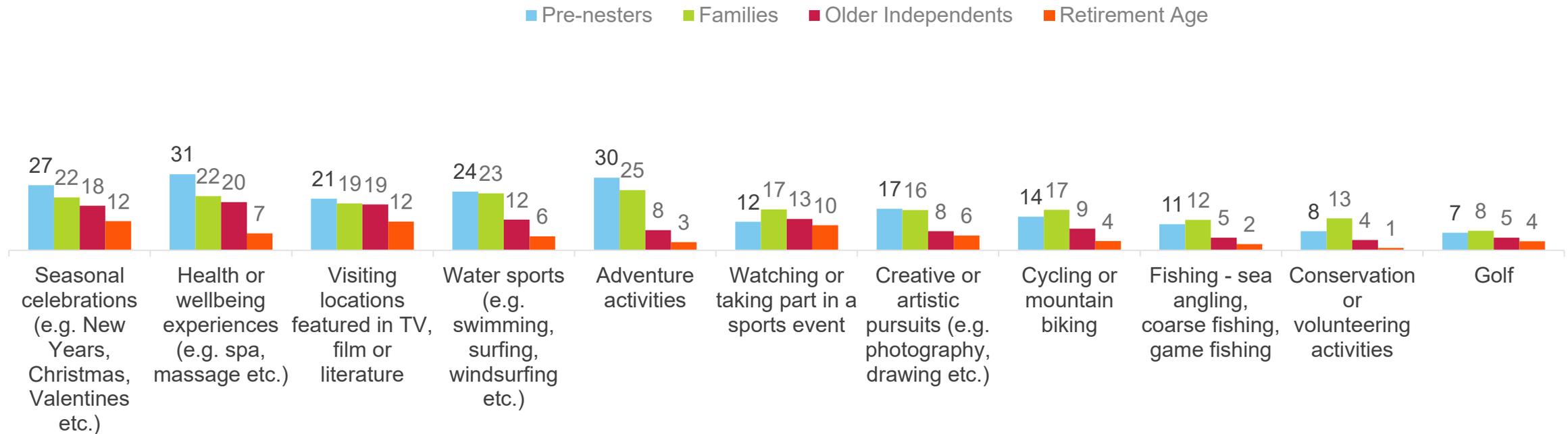
Base: All respondents n=1,146



Experiences would most like to do – by life stage

- Pre-nesters are the most likely to be interested in ‘health or wellbeing activities’ and ‘adventure activities’ – both of which make it into their top 7 preferred activities overall. ‘Adventure activities’ also appeal to families.

Figure 18. Experiences would most like to do on a UK holiday/short break by life stage, Percentage, All respondents



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

Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226



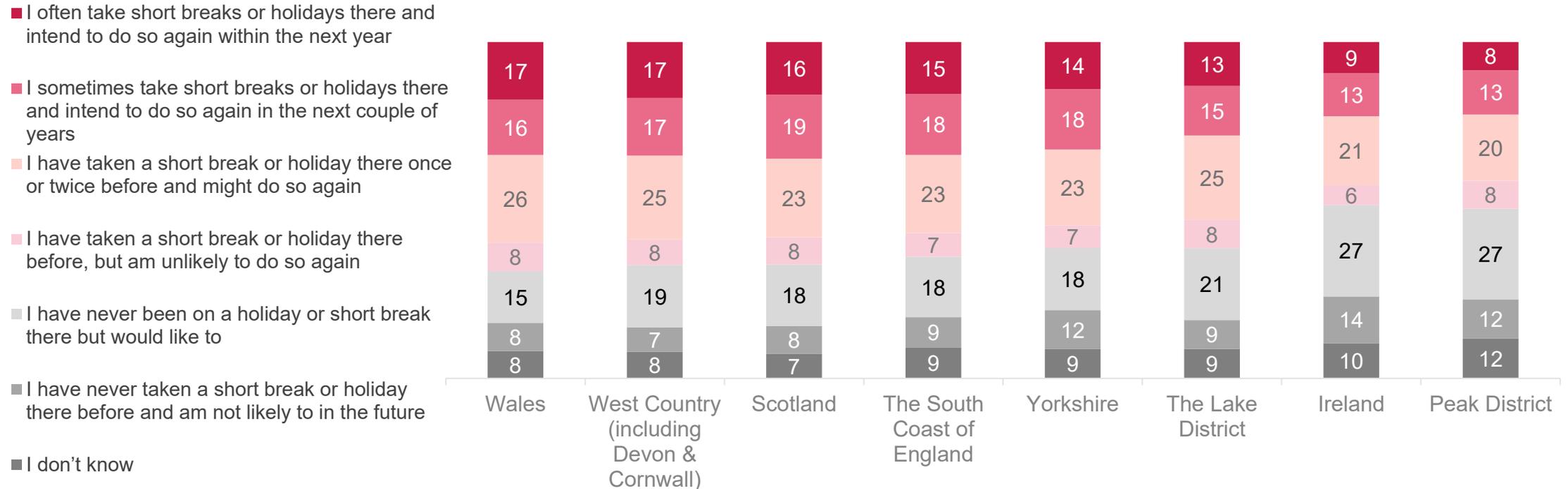
Destination relationships and previous visits



Loyalty with Wales

- Wales, the West Country, Scotland and The South Coast of England generate similar proportions of the UK holiday market who have taken short breaks or holidays there in the past and intend to do so again – around 3 in 5 falling into this category.
- 15% of the UK holiday market have *never* taken a holiday or short break in Wales, but would like to, with just 16% indicating they are never likely to visit Wales for a holiday or short break.

Figure 19. Relationship with each destination, Percentage, All respondents



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

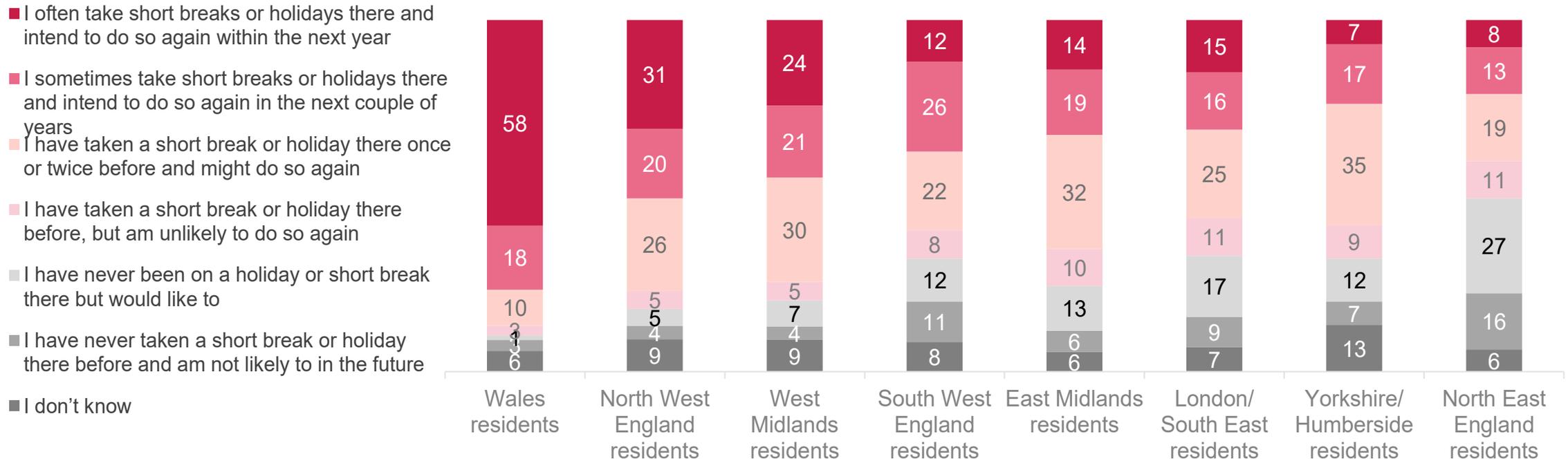
Base: All respondents n=1,146



Loyalty with Wales by region of residence

- Wales residents exhibit the highest 'loyalty' to Wales in terms of trips, 3 in 5 'often taking short breaks or holidays there and intending to do so in the next year'. Behind Wales, neighbouring North West of England, the West Midlands and the South West of England exhibit the strongest relationship.

Figure 20. Relationship with Wales by region of residence, Percentage, All respondents



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

Base: All respondents. Wales n=196; North West n=111; West Mids n=100; Yorkshire n=80; London/South East n=259; South West England n=79; Scotland n=79; East Mids n=82; North East England n=38; East of England n=94

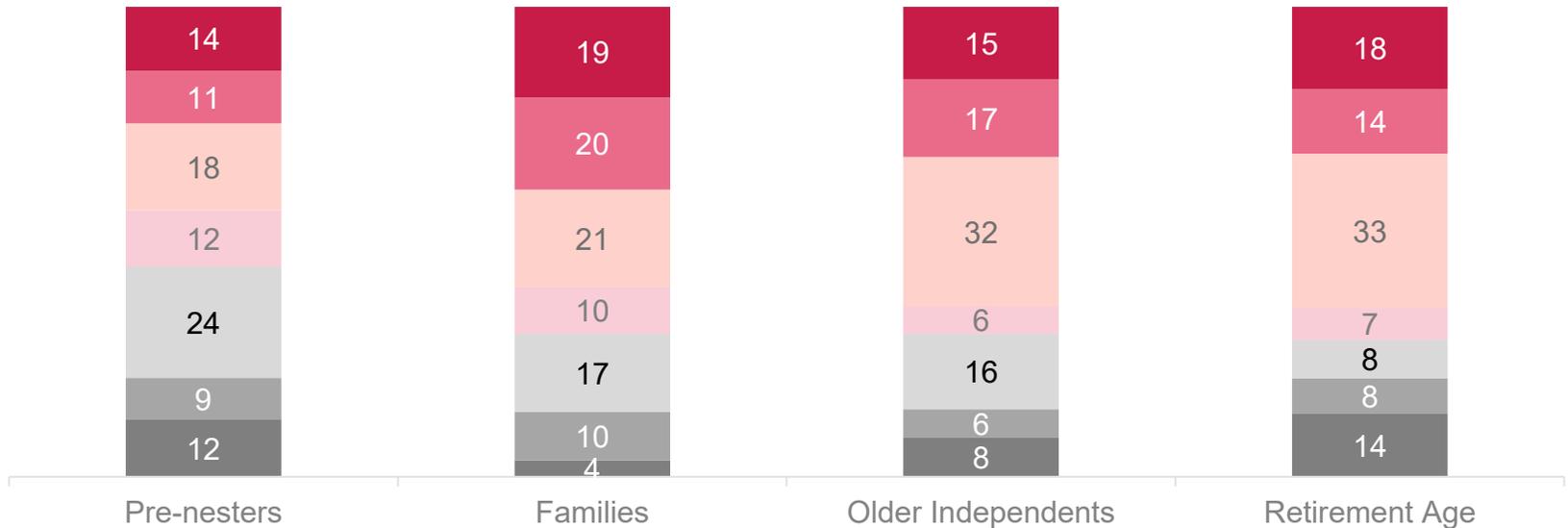


Loyalty with Wales by life stage

- Families report the strongest relationship with Wales as a holiday or short break destination – 39% taking holidays/short breaks there often or sometimes and intending to do so again in the next couple of years.

Figure 21. Relationship with Wales by life stage, Percentage, All respondents

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



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

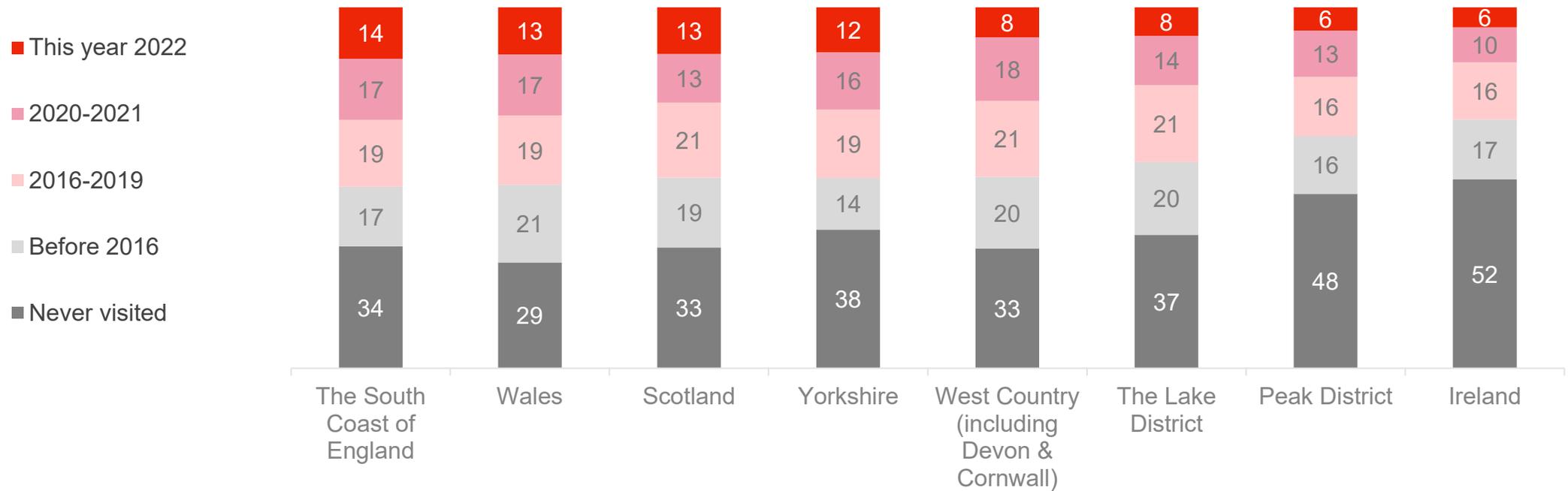
Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226



Previous visits to each destination

- 3 in 10 of the UK domestic holiday market had last visited Wales for a holiday or short break between 2020 and mid-2022, higher than any other UK destination with the exception of The South Coast of England. This is largely driven by a high incidence of visits so far this year. When looking exclusively at 2020-2021, the West Country has generated the highest proportion of visits.

Figure 22. Previous visits to each destination, 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?

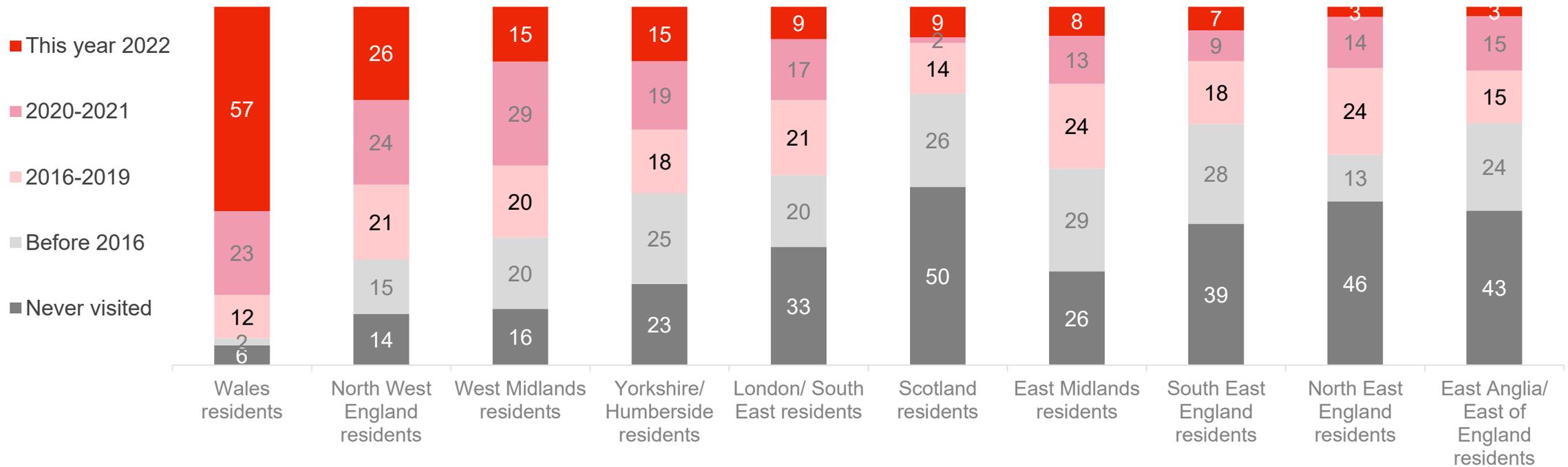
Base: All respondents n=1,146



Previous visits to Wales by region of residence

- Wales residents are most likely to have last visited Wales for a holiday/short break this year, followed by the more geographically close regions of North West of England, West Midlands and Yorkshire/Humberside.
- Residents of Scotland, North East England and East Anglia/East of England are the most likely to have 'never visited' Wales.

Figure 23. Previous visits to WALES by region of residence, 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?

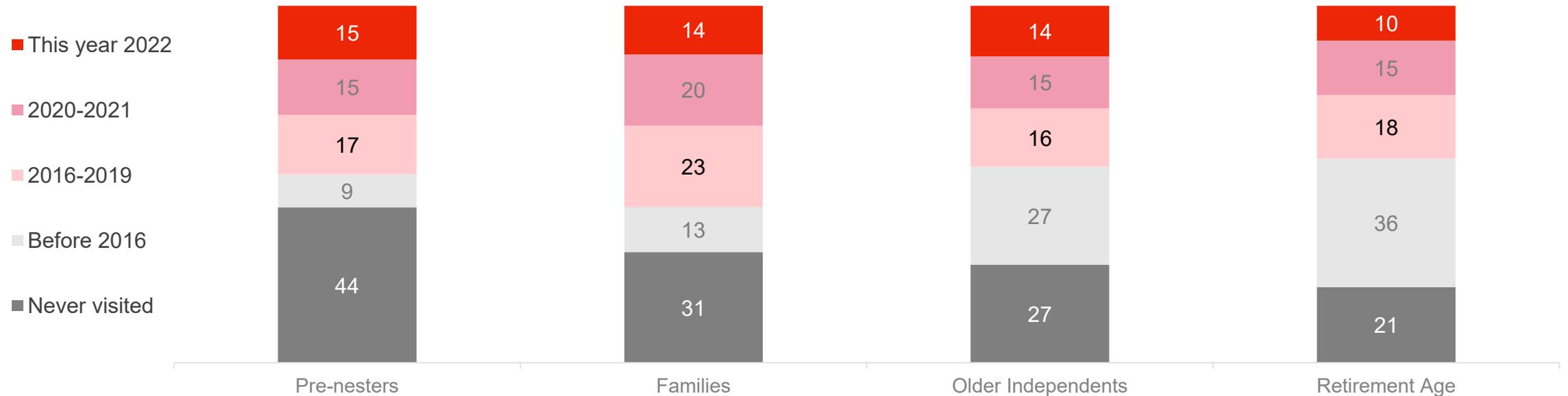
Base: All respondents. Wales n=196; North West n=111; West Mids n=100; Yorkshire n=80; London/South East n=259; South West England n=79; Scotland n=79; East Mids n=82; North East England n=38; East of England n=94



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, a third having done so. Retirees show a lower level of recent visitation over the last 2 years, which is in line with lower visit levels for domestic holidays, linked to Covid-19.

Figure 24. 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?

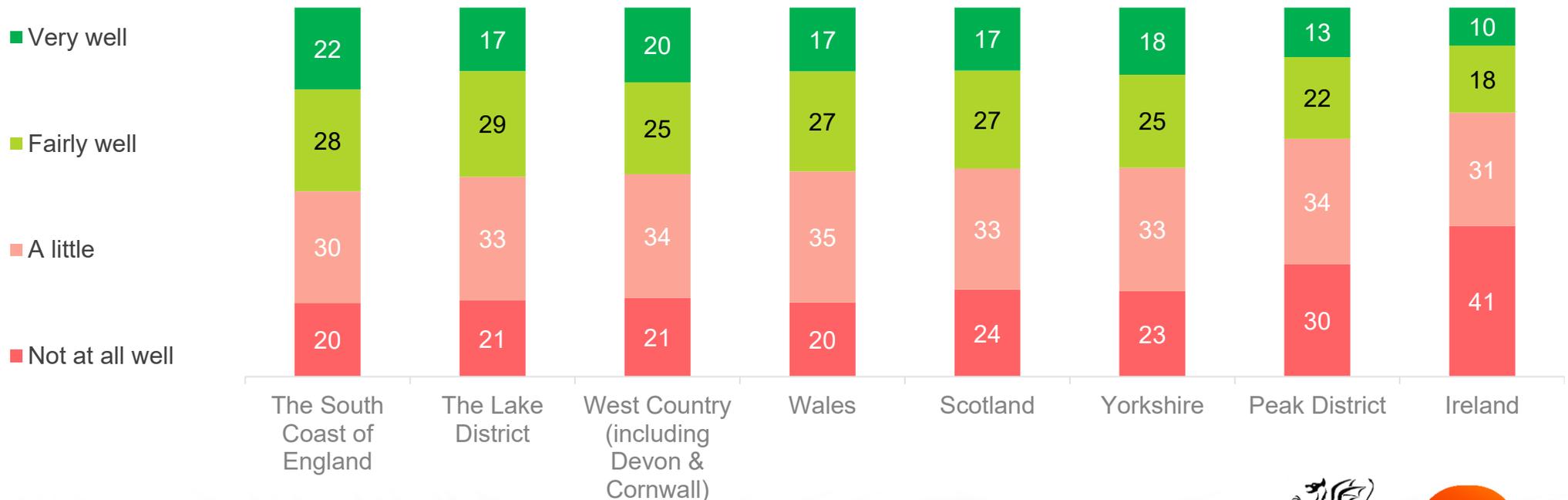
C4. When did you last visit these places for a holiday or short break?

Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226

Level of familiarity with destinations

- Driven by high population volumes in this area, The South Coast of England generates the highest levels of familiarity as a destination – 50% knowing it ‘very or fairly well’ – followed by The Lake District (46%) and The West Country (45%).
- The UK holiday market report similar levels of familiarity with Wales and Scotland (both at 44%).
- Notably, familiarity with all destinations has increased since 2020.
- Familiarity generally correlates with previous visits.

Figure 25. Level of familiarity with destinations, Percentage, All respondents



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

Base: All respondents n=1,146



Destination familiarity with Wales by region of residence

- Familiarity with Wales differs widely by region of residence, correlating to some extent with proximity to Wales and previous visits. Unsurprisingly, Wales residents are the most familiar, followed by residents from the North West of England and the West Midlands. Residents from Scotland, East of England and North East of England, report the lowest levels of familiarity.

Figure 26. Level of familiarity with WALES by region of residence, Percentage, All respondents



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

Base: All respondents. Wales n=196; North West n=111; West Mids n=100; Yorkshire n=80; London/South East n=259; South West England n=79; Scotland n=79; East Mids n=82; North East England n=38; East of England n=94



Destination familiarity with Wales by life stage

- Correlating with previous visits, families exhibit the strongest familiarity with Wales.

Figure 27. Level of familiarity with WALES by life stage, Percentage, All respondents

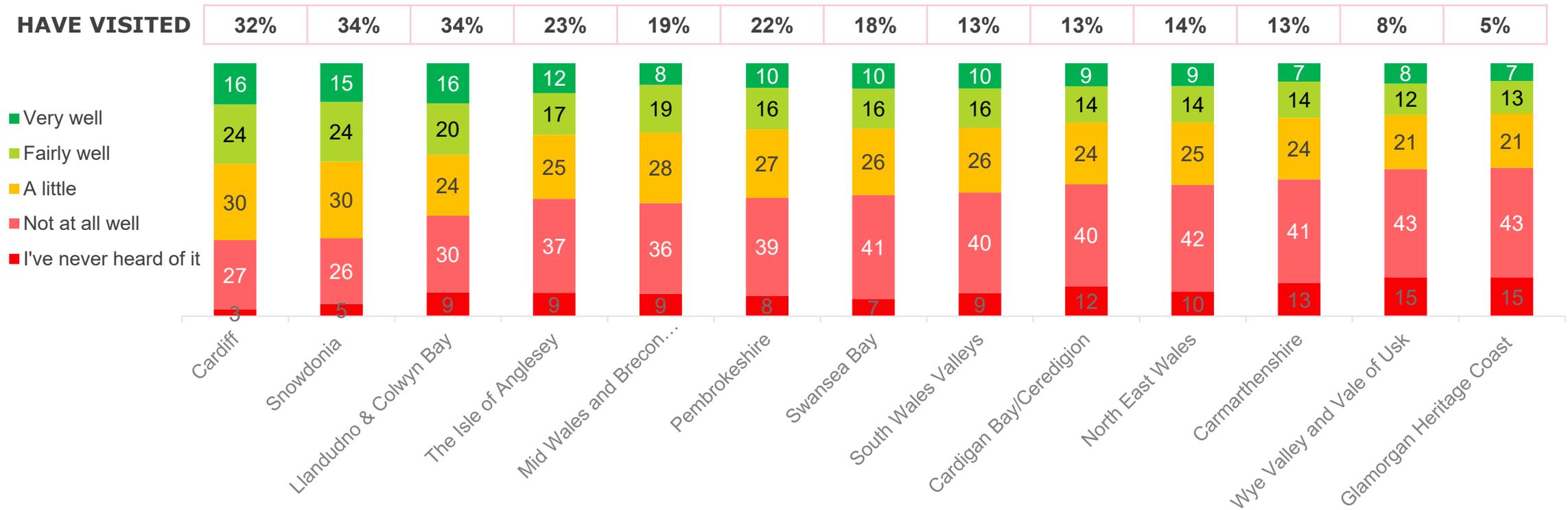


C1c . How well, if at all, do you know each of these parts of the UK and Ireland?
Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226

Level of familiarity with areas of Wales

- Cardiff generates the highest familiarity of areas within Wales, followed by Snowdonia and Llandudno & Colwyn Bay.
- Familiarity generally correlates with previous visits – these three destinations all having been previously visited by around a third of the domestic market.
- Familiarity and visits are lowest with Glamorgan Heritage Coast and Wye Valley & Vale of Usk.

Figure 28. Level of familiarity with areas of Wales, Percentage, All respondents



E2. How well, if at all, do you know the following areas of Wales?

Base: All respondents n=1,146



Level of familiarity with each Wales region

- Perhaps unsurprisingly, familiarity with areas within Wales correlates strongly with proximity to region of residence. Residents of the North West of England, for example, demonstrate higher familiarity with areas of North Wales, whilst residents of the South West of England are most familiar with Cardiff.

Table 1. Level of familiarity with each Wales region by region of residence, All respondents (Colour-coded by level of familiarity)

		REGION OF RESIDENCE									
		Wales	North West England	West Midlands	London/South East	South West England	Scotland	East Midlands	Yorkshire/Humberside	North East England	East Anglia/East of England
ARE OF WALES FAMILIAR WITH	The Isle of Anglesey	38%	49%	26%	32%	18%	10%	18%	30%	33%	21%
	Llandudno & Colwyn Bay	47%	67%	45%	34%	18%	16%	33%	37%	50%	28%
	North East Wales	42%	35%	27%	29%	13%	6%	16%	23%	22%	13%
	Snowdonia	53%	56%	49%	42%	23%	21%	41%	43%	46%	22%
	Mid Wales and the Brecon Beacons	65%	25%	44%	32%	22%	14%	25%	12%	20%	25%
	Cardigan Bay/Ceredigion	47%	26%	32%	34%	11%	9%	14%	19%	19%	12%
	Pembrokeshire	62%	23%	43%	28%	18%	14%	25%	23%	22%	18%
	Carmarthenshire	56%	20%	29%	29%	13%	14%	18%	6%	11%	14%
	Swansea Bay	60%	27%	31%	33%	16%	16%	13%	20%	24%	19%
	South Wales Valleys	67%	19%	30%	32%	19%	18%	19%	23%	21%	13%
	Cardiff	79%	41%	44%	46%	40%	32%	33%	25%	37%	27%
	Glamorgan Heritage Coast	40%	17%	26%	30%	12%	8%	15%	12%	15%	13%
Wye Valley and Vale of Usk	41%	14%	26%	27%	16%	7%	18%	21%	13%	17%	

E2. How well, if at all, do you know the following areas of Wales?

Base: All respondents. Wales n=196; North West n=111; West Mids n=100; Yorkshire n=80; London/South East n=259; South West England n=79; Scotland n=79; East Mids n=82; North East England n=38; East of England n=94



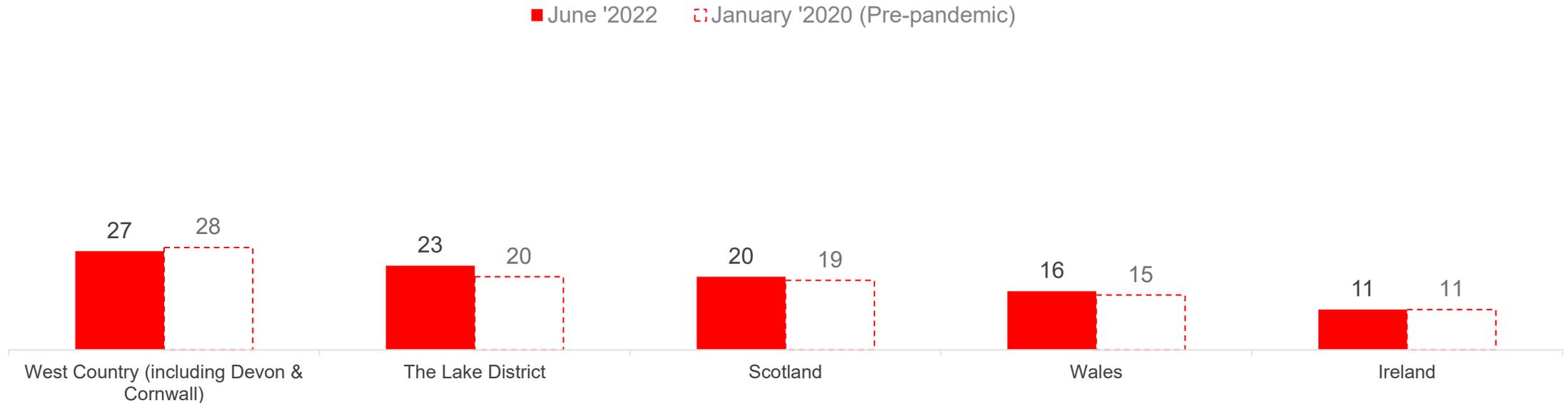
Destination associations and preferences



Number one most recommended UK destination

- Despite limited differences in previous visits to destinations, there is clear separation in destination recommendation, 'the West Country' number one, 7 percentage points ahead of The Lake District. Wales is the 4th most likely to be the most 'strongly recommended', ahead of only Ireland.
- There are no significant differences in destination recommendation compared to 2020.

Figure 29. Number one most recommended destination, Percentage, All respondents



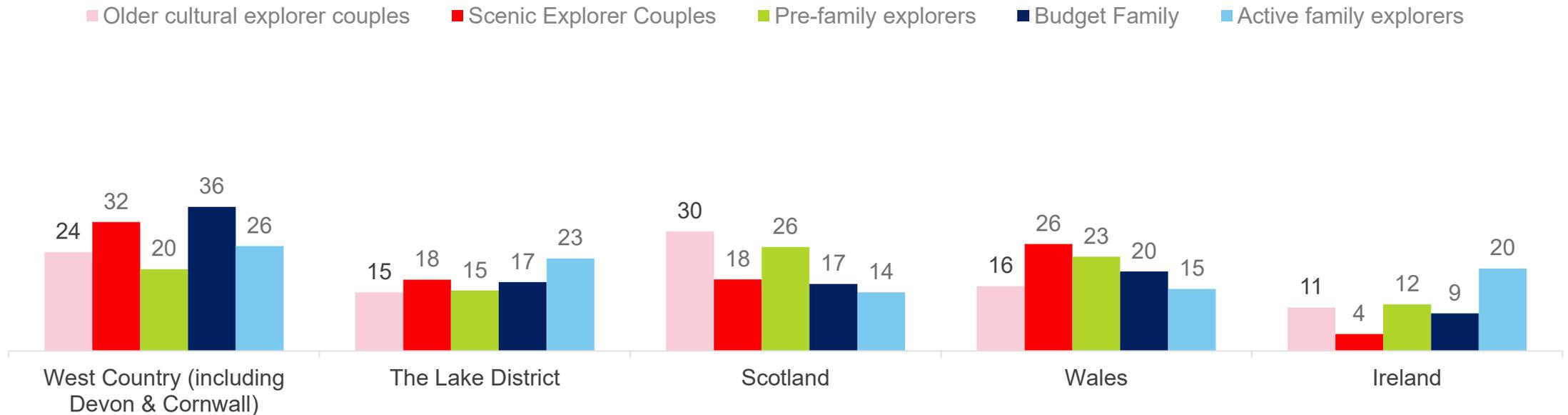
D1a. We'd like you to imagine that a friend who has never been to the places listed below has asked your advice on which one to choose for a holiday or short break in the next 12 months. Based on your own preferences, which one place would you strongly recommend?

Base: All respondents n=1,146

Number one most recommended destination by priority segment

- The number one most recommended destination differs by priority segment. Positively, although Wales is the fourth most recommended overall, it is the second most recommended amongst ‘scenic explorer couples’, ‘pre-family explorers’ and ‘budget families’.
- Wales is less likely to be the most recommended destination for Active Family Explorers and Older Cultural Explorers.

Figure 30. Number one most recommended destination by priority segments, 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 12 months. Based on your own preferences, which one place would you strongly recommend?

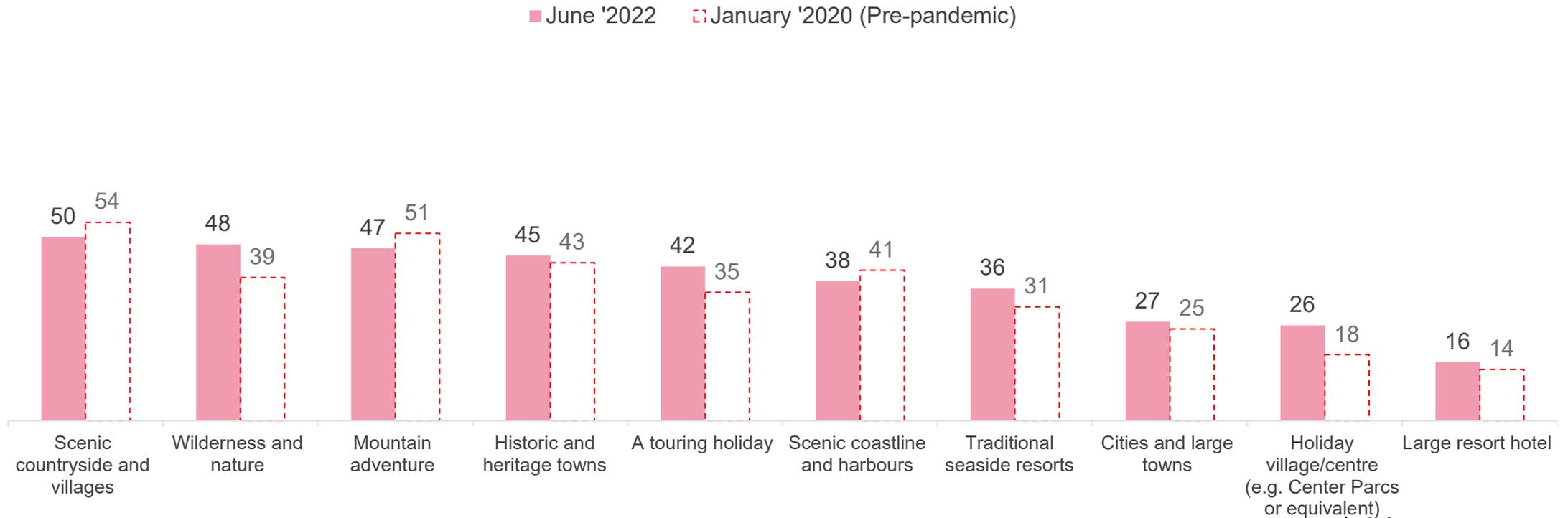
Base: Older cultural explorers n=29; Scenic Explorer Couples n=63; Pre-family explorers n=72; Active Family Explorers n=77; Budget Families n=152



Destination types associated with Wales compared to 2020

- Wales is most likely to be associated with ‘scenic countryside and villages’, ‘wilderness and nature’ and ‘mountain adventure’.
- Compared to 2020, there have been significant increases in Wales’ associations with ‘wilderness and nature’ and ‘touring holidays’.
- Wales associations with ‘cities and large towns’ is notably lower.

Figure 31. Destination associations with Wales compared to 2020, Percentage, All respondents



D2 Below are the types of destination you are seriously considering visiting for a holiday or short break in the next 12 months. Which, if any, of these places do you most associate with these destination types?

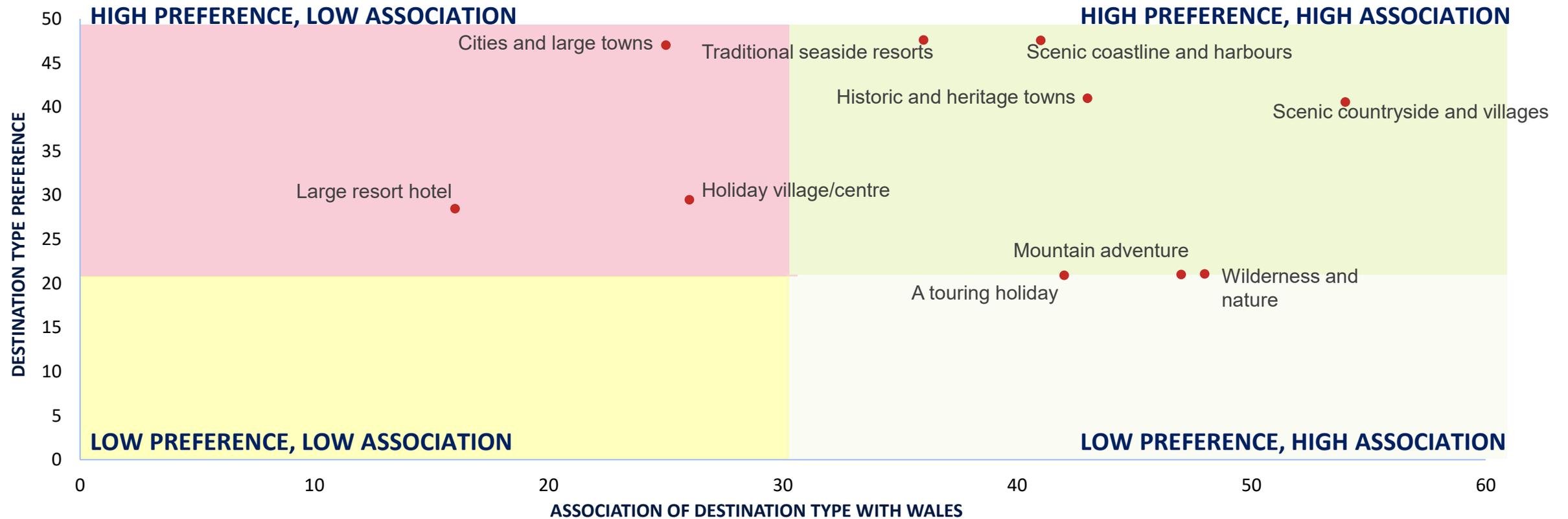
Base: All respondents considering each destination



Wales destination types associations against preferences

- Wales has relatively high associations in most of the 'high preference destination types', in particular 'scenic countryside and villages', 'historic and heritage towns' and 'scenic coastline and harbours'. Wales scores less well on 'cities and large towns', 'holiday villages/centres' and 'large resort hotels'.

Figure 32. 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 12 months. Which, if any, of these places do you most associate with these destination types?

Base: All respondents considering each destination



Destination types associated with selected UK destinations

- Wales does not generate the highest association for any destination type – however, it makes the top 2 for ‘historic and heritage towns’, ‘traditional seaside resorts’ and ‘scenic coastlines and harbours’ – although it is significantly below the leading destination.
- West Country is the leading destination associated with seaside holidays, whilst Scotland is the lead destination associated with urban, mountain adventure and touring holidays.

Table 2. 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% Lake District	 56% Lake District	 54%	 59%	 66% West Country	 69% West Country	 61%	 54%	 36% Lake District	 27% West Country
 54% West Country	 52%	 38%	 45%	 36%	 38%	 49% Lake District	 42% Lake District	 33% West Country	 22% Lake District
 50%	 48%	 27%	 41% West Country	 16%	 37%	 47%	 42%	 26%	 16%
 46%	 36%	 17% West Country	 40%	 13%	 33%	 25%	 40%	 14%	 13%
 45%	 33% West Country	 10% Lake District	 31% Lake District	 10% Lake District	 25% Lake District	 10% West Country	 40% West Country	 12%	 9%

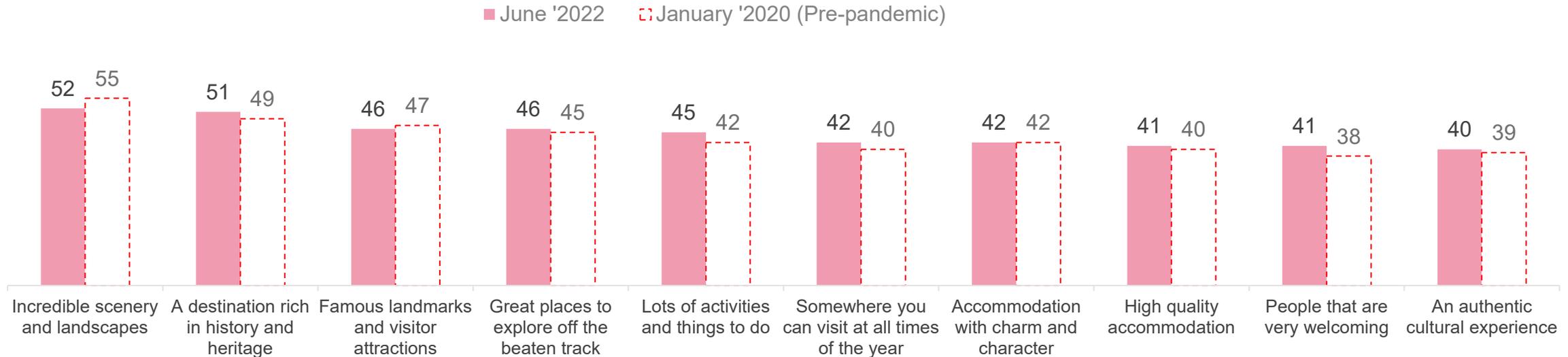
D2 Below are the types of destination you are seriously considering visiting for a holiday or short break in the next 12 months. Which, if any, of these places do you most associate with these destination types?

Base: All respondents considering each destination

Destination influences associated with Wales compared to 2020

- Wales is most associated with 'incredible scenery and landscapes', being 'rich in history and heritage', 'famous landmarks and visitor attractions', 'great places to explore off the beaten track' and 'lots of activities and things to do' – all generating an association of 45% and above.
- There have been minimal movements since 2020, although most have moved in a positive direction.

Figure 33. Wales destination influence associations with Wales compared to 2020, Percentage Top 10, All respondents



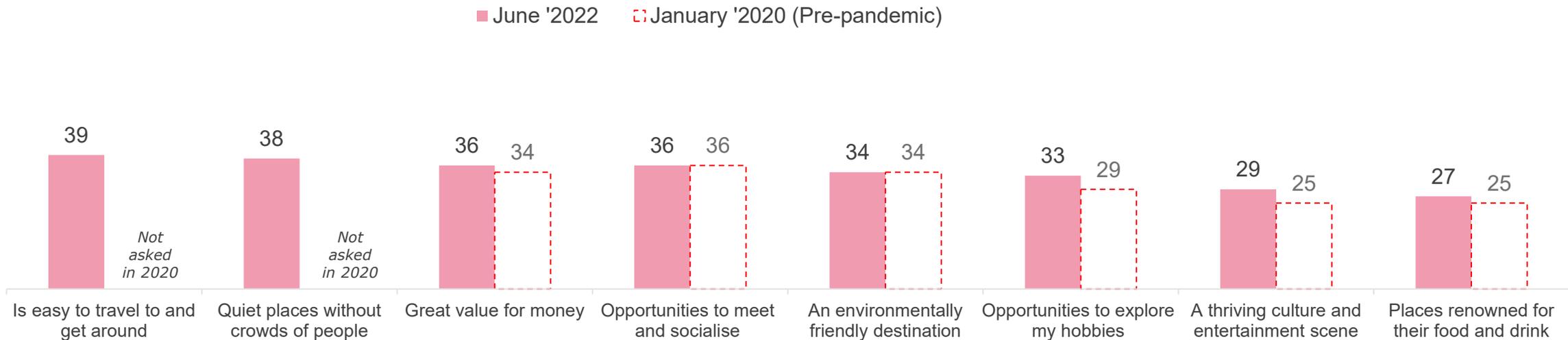
D3. Below are the destination influences we showed you earlier. Which, if any, of these places do you most associate with each influence?

Base: All respondents n= 1,146

Destination influences associated with Wales compared to 2020

- Wales has weaker associations with food and drink and culture and entertainment

Figure 34. Destination influence associations with Wales compared to 2020, Percentage Top 10, 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?

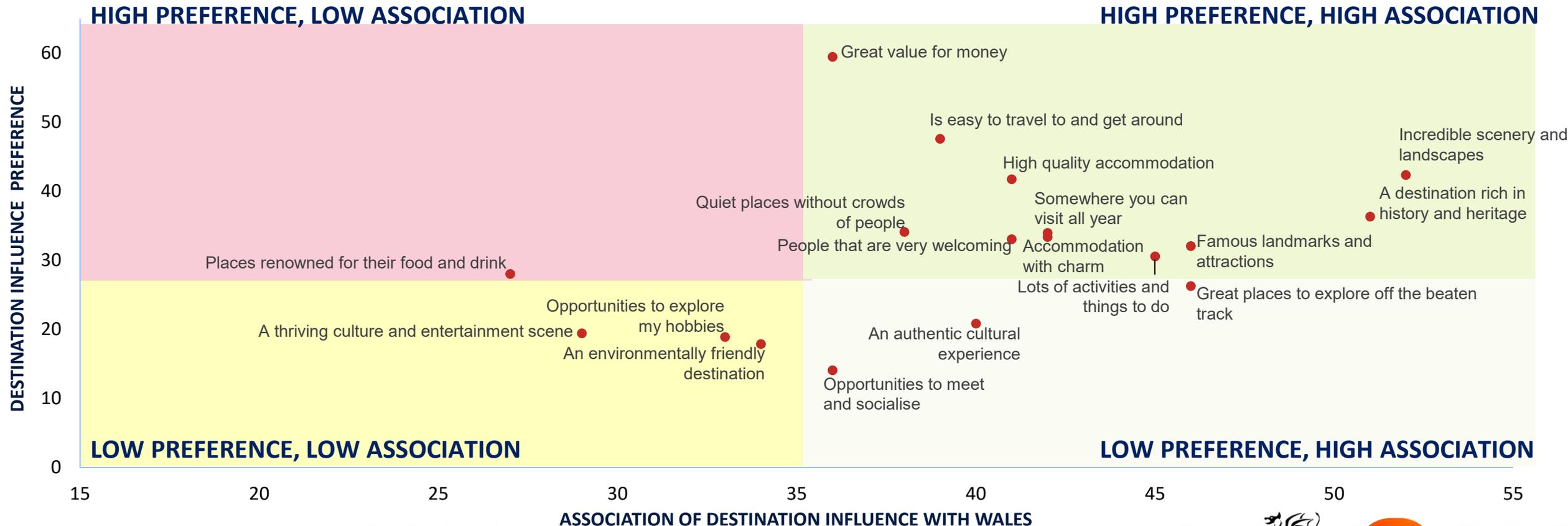
Base: All respondents n= 1,146



Wales destination influence associations against preferences

- Wales scores relatively high for most 'high preference' destination influences – in particular 'incredible scenery and landscapes' and 'a destination rich in history and heritage'.
- Places renowned for their food and drink' and 'a thriving culture and entertainment scene' score low relative to preference however.

Figure 35. 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= 1,146



Destination associations – trip influences

- In a competitive context, Wales has the strongest association as a place providing ‘great for value for money’, and the second strongest for being ‘a destination rich in history and heritage’. Although ‘famous landmarks and visitor attractions’ is a trip influence for which Wales has strong associations (see previous pages), it is significantly behind Scotland in this area.

Table 3. 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
 45%	 48%	 43%	 58%	 60%	 43%	 45%	 49%	 36%
 44%	 45%	 35%	 51%	 47%	 39%	 44%	 47%	 34%
 41%	 40%	 35%	 49%	 46%	 29%	 42%	 47%	 29%
 41%	 36%	 34%	 44%	 43%	 28%	 41%	 42%	 28%
 37%	 32%	 28%	 37%	 42%	 21%	 37%	 42%	 24%

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= 1,146

Destination associations – trip influences

- Relative to other destinations, Wales also has the strongest associations as somewhere that is ‘easy to travel to and get around’ – although there are minimal differences with other British destinations for this measure.
- Although Wales’ strongest association is somewhere with ‘incredible scenery and landscapes’, it sits significantly behind The Lake District and Scotland on this measure.
- Wales is less associated than competitors for quality accommodation, food and drink, welcome and socialising.

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

High quality accommodation	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
 49%	 50%	 49%	 60%	 40%	 37%	 43%	 40%	 39%
 47%	 45%	 48%	 59%	 39%	 37%	 41%	 39%	 38%
 46%	 45%	 46%	 52%	 37%	 36%	 40%	 38%	 38%
 41%	 43%	 41%	 51%	 27%	 33%	 36%	 30%	 36%
 40%	 38%	 39%	 48%	 23%	 29%	 34%	 29%	 28%

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

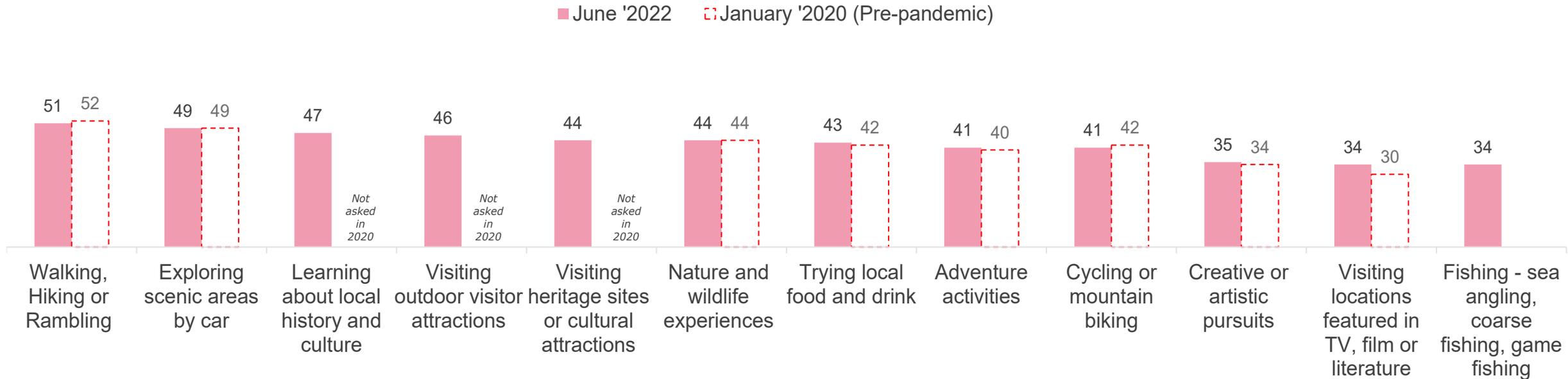
Base: All respondents n= 1,146



Experiences associated with Wales compared to 2020

- In relation to experiences, Wales has high associations with ‘walking, hiking or rambling’, ‘exploring scenic areas by car’, ‘learning about local history and culture’ and ‘visiting outdoor attractions’.
- Experience associations are relatively similar to 2020, although some have increased – most notably, ‘visiting locations featured in TV’

Figure 36. Experience associations with Wales compared to 2020, Percentage Top 12, All respondents



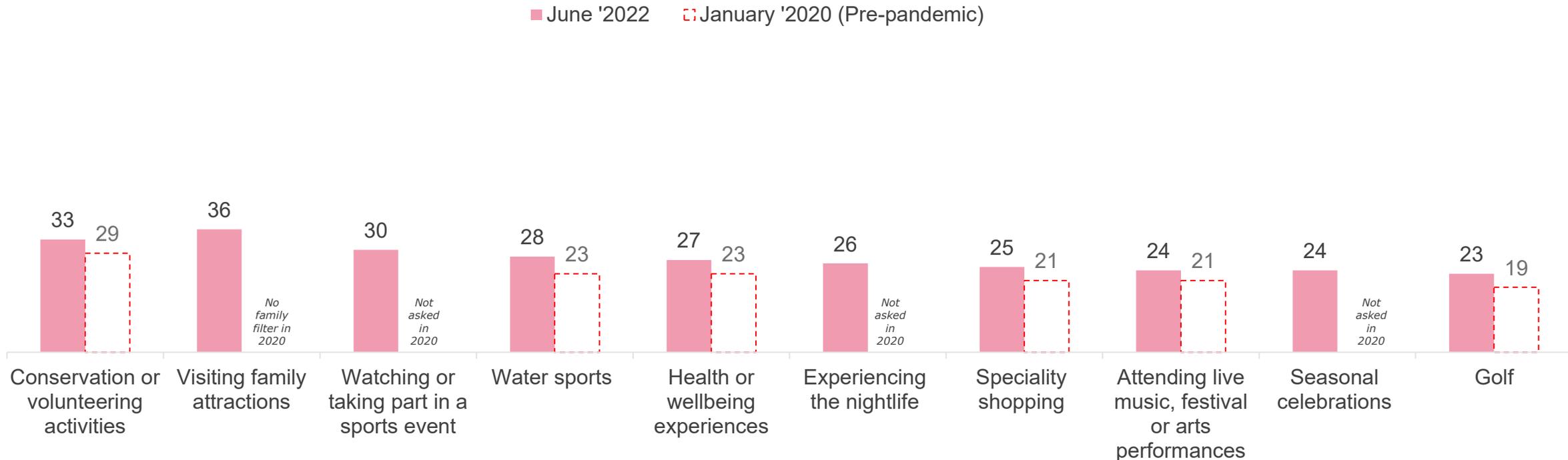
D4. And which, if any, of these places do you think are best suited to these holiday experiences?

Base: All respondents n= 1,146

Experiences associated with Wales compared to 2020

- Associations are relatively lower for 'golf', 'seasonal celebrations' and 'attending live music', although this will in part be linked to relevance to the individual. Since 2020, associations have increased for 'conservation or volunteering activities', 'water sports', 'speciality shopping' and 'health or wellbeing experiences'.

Figure 37. 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= 1,146

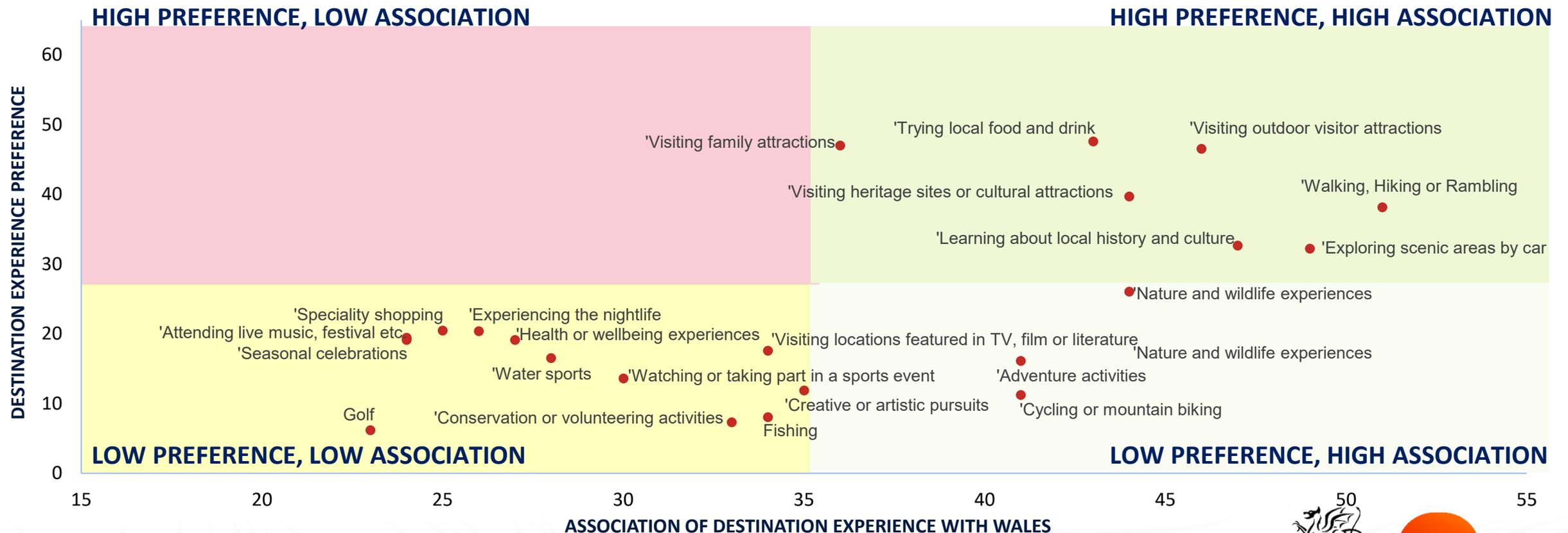
Visiting family attractions of families only n=415



Wales destination experience associations against preferences

- Wales has generally high associations with the majority of destination experiences that are of high importance, in particular for 'visiting outdoor attractions', 'walking, hiking or rambling' and 'exploring scenic areas by car'. 'Visiting family attractions' is the lowest scoring 'high preference experience'.
- 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 38. 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= 1,146

Visiting family attractions of families only n=415



Destination associations – trip experiences

- Within a competitive context, Wales has a ‘top 2’ association with ‘visiting heritage sites or cultural attractions’, ‘exploring scenic areas by car’ and ‘conservation or volunteering activities’.
- Perhaps notably, Wales is ranked fourth for the experiences the domestic holiday market would most like to do on a holiday – ‘trying local food and drink’ and ‘visiting outdoor visitor attractions’.

Table 5. 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	Speciality shopping
 55%	 52%	 41%	 55%	 45%	 55%	 34%	 43%	 36%	 51%	 36%	 34%
 44%	 51%	 37%	 47%	 38%	 49%	 33%	 42%	 33%	 49%	 29%	 28%
 43%	 49%	 31%	 47%	 38%	 49%	 32%	 38%	 29%	 46%	 27%	 26%
 41%	 46%	 29%	 39%	 37%	 47%	 31%	 35%	 27%	 43%	 24%	 25%
 36%	 38%	 28%	 38%	 34%	 45%	 26%	 35%	 23%	 34%	 17%	 22%

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

Base: All respondents n= 1,146

Destination associations – trip experiences

- Wales also has a ‘top 2’ association with ‘watching or taking part in a sports event’. For most other experiences, Wales is ranked third or fourth.
- Notably, the Lake District has stronger associations with adventure activities, although these are also associated with Wales and Scotland, along with walking and cycling.

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

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
 53% Lake District	 58% Lake District	 44% Lake District	 45% Lake District	 48% West Country	 42% Scotland	 50% Scotland	 53% Scotland	 39% Ireland	 36% Scotland
 50% Scotland	 52% Scotland	 41% Scotland	 43% Scotland	 35% Lake District	 39% West Country	 31% Ireland	 29% Ireland	 38% Scotland	 30% Wales
 44% West Country	 51% Wales	 41% Wales	 41% Wales	 28% Wales	 34% Wales	 26% Lake District	 23% Wales	 26% Wales	 29% Ireland
 44% Wales	 47% West Country	 36% West Country	 32% West Country	 26% Scotland	 34% Ireland	 24% Wales	 19% West Country	 25% West Country	 20% West Country
 38% Ireland	 41% Ireland	 31% Ireland	 30% Ireland	 23% Ireland	 29% Lake District	 23% West Country	 17% Lake District	 17% Lake District	 18% Lake District

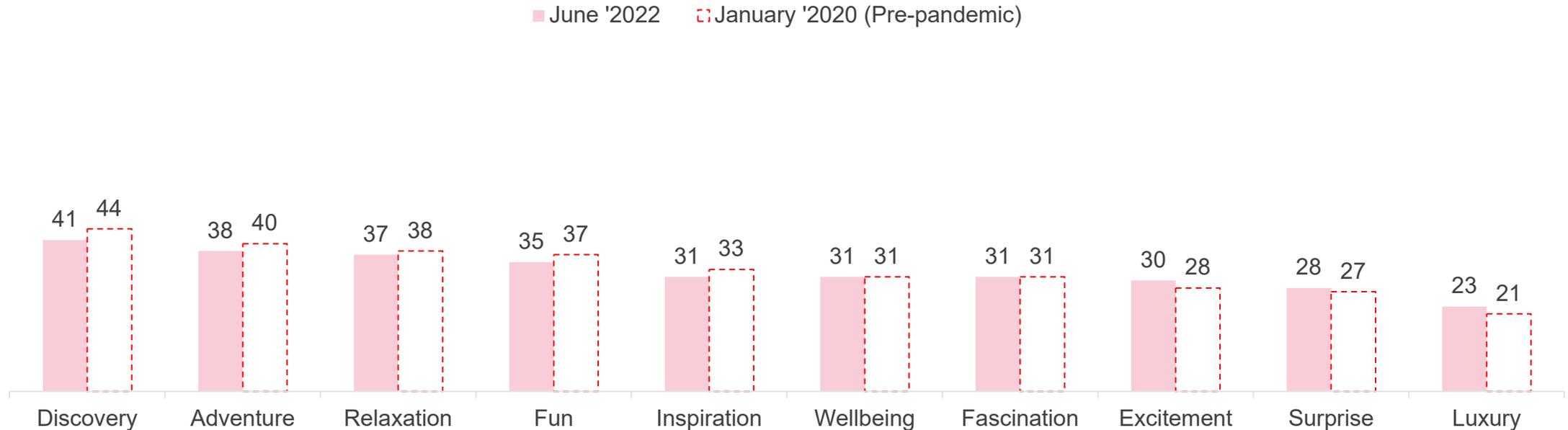
D4. And which, if any, of these places do you think are best suited to these holiday experiences?

Base: All respondents n= 1,146

Wales destination associations - feelings compared to 2020

- In terms of 'feelings', Wales is most likely to be associated with discovery, adventure and relaxation – least likely to be associated with luxury, surprise and excitement.
- There are minimal differences with 2020.

Figure 39. 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 in the UK and Ireland. 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=1,146

Destination associations – trip feelings

- In a competitive context, Wales does not generate a ‘top 2 association’ for any feeling, and only two ‘top 3 associations’ for relaxation and adventure.
- Scotland has notably stronger associations as an exciting, surprising, fascinating destination to discover, whereas the Lake District is associated with wellbeing, relaxation and romance.

Table 7. Destinations most strongly associated with each trip feeling, All respondents

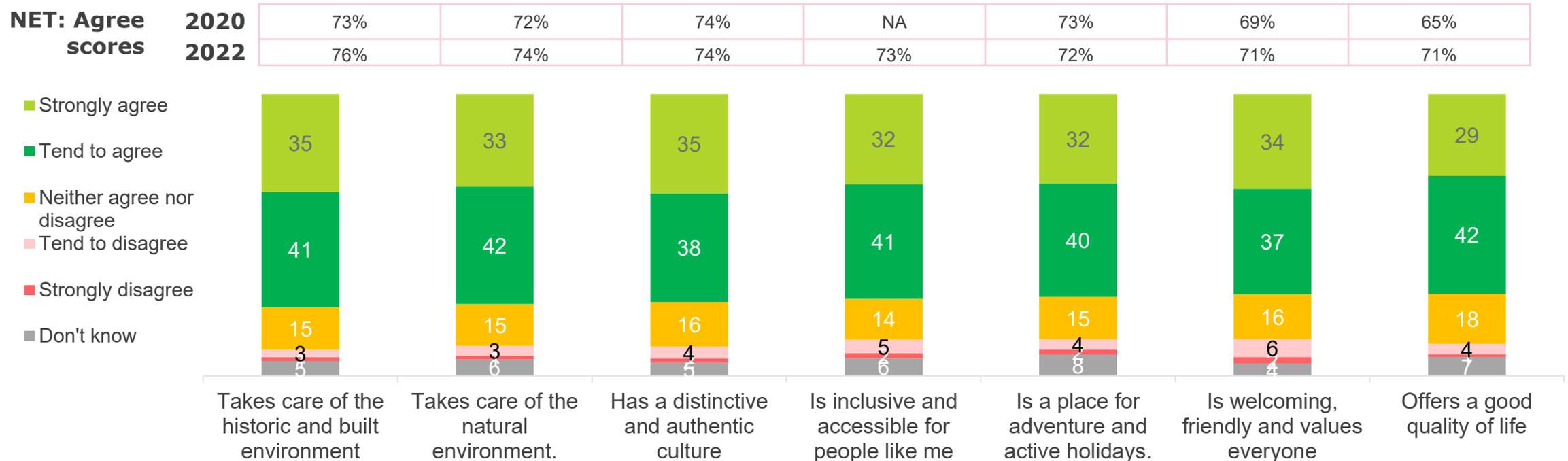
Excitement	Relaxation	Inspiration	Surprise	Adventure	Luxury	Discovery	Wellbeing	Fun	Romance	Fascination
 40%	 49%	 42%	 33%	 47%	 38%	 48%	 44%	 46%	 37%	 40%
 35%	 48%	 39%	 31%	 41%	 37%	 44%	 39%	 41%	 31%	 36%
 33%	 37%	 37%	 30%	 38%	 33%	 41%	 34%	 39%	 31%	 34%
 30%	 37%	 34%	 29%	 35%	 25%	 41%	 31%	 35%	 29%	 34%
 29%	 32%	 31%	 28%	 34%	 23%	 40%	 30%	 35%	 23%	 31%

D5. The list below outlines some feelings other people have experienced on holidays and short breaks in the UK and Ireland. 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=1,146

Wider brand perceptions of Wales

- Wales has relatively strong associations as somewhere that 'takes care of its historic and built environment' and that 'takes care of the natural environment', both of which have increased marginally since 2020. The majority of other associations have also increased since 2020

Figure 40. Wider brand perceptions of Wales, Percentage Top 7,



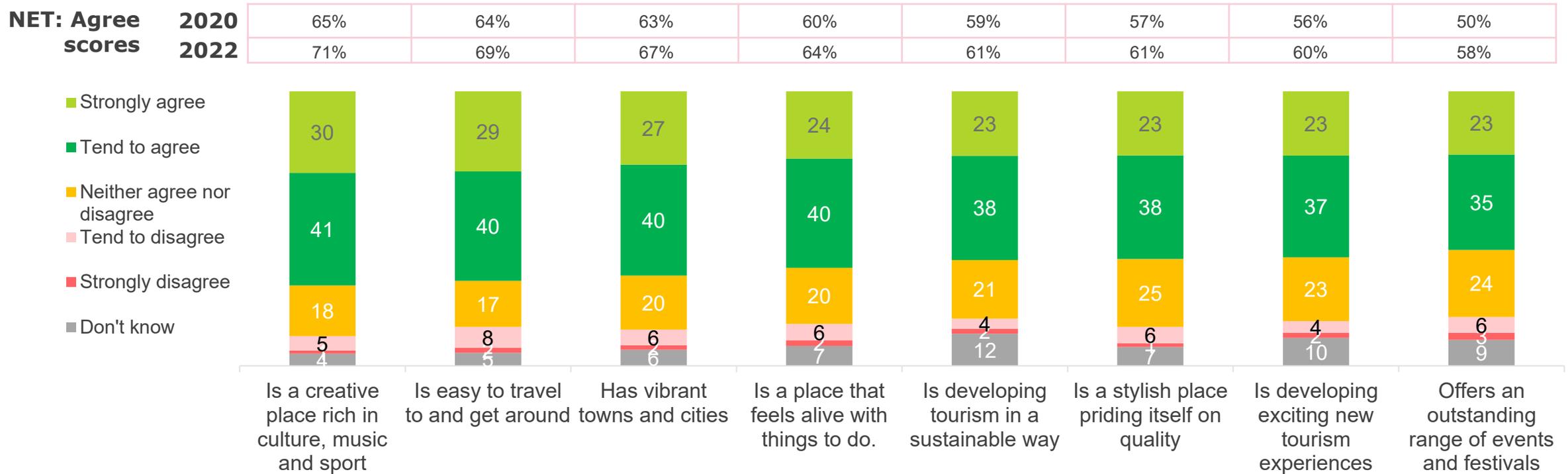
F5. How much do you agree or disagree with these statements about Wales?
 Base: All respondents n=1,146



Wider brand perceptions of Wales

- Offering 'an outstanding range of events and festivals' has the lowest rating, but has increased by 8 percentage points since 2020.

Figure 41. Wider brand perceptions of Wales, Percentage Top 7,



F5. How much do you agree or disagree with these statements about Wales?

Base: All respondents n=1,146



Future visits to Wales



Trips taken in Wales in 2022 and intended in next 12 months

- 1 in 4 (24%) of the UK domestic holiday market have taken a short break or holiday in Wales so far in 2022 (between January and June), with 26% stating they have either already booked or will definitely take a Wales trip in the next 12 months. A notable 1 in 4 (27%) state they will 'probably' do so.

Figure 42. Whether taken a Wales trip between January and June 2022, Percentage, All respondents

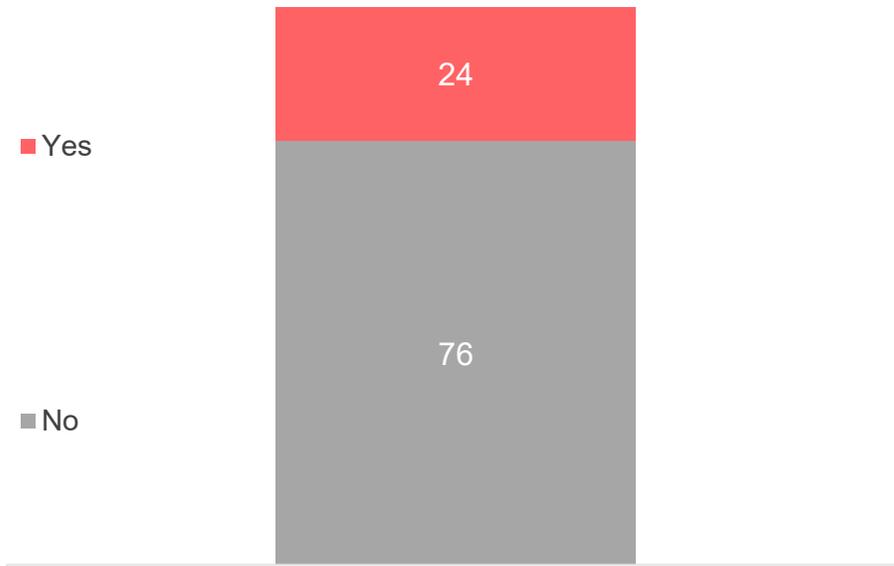
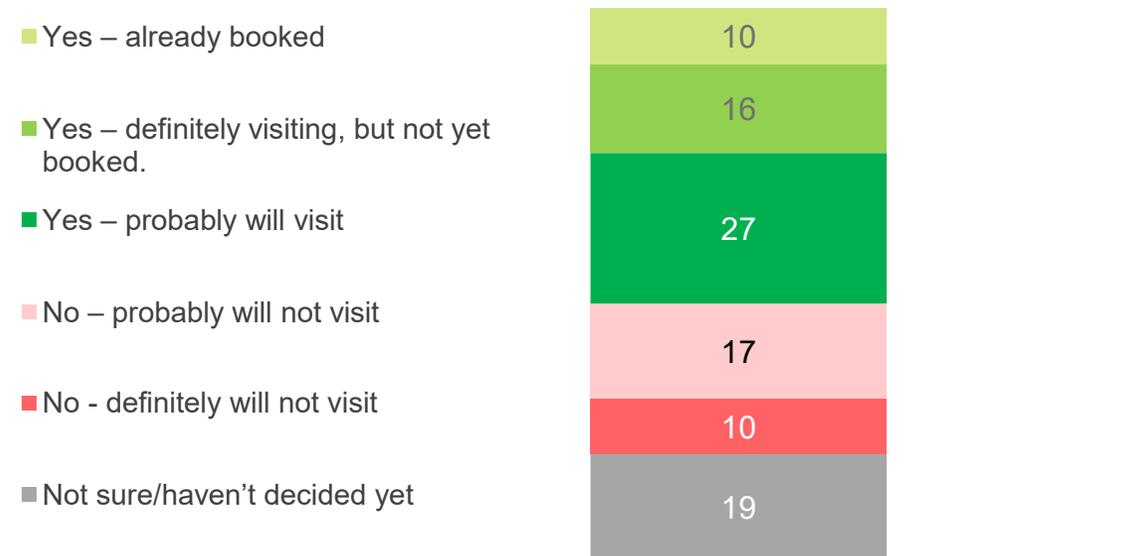


Figure 43. Wales trips intended in next 12 months, Percentage, All respondents



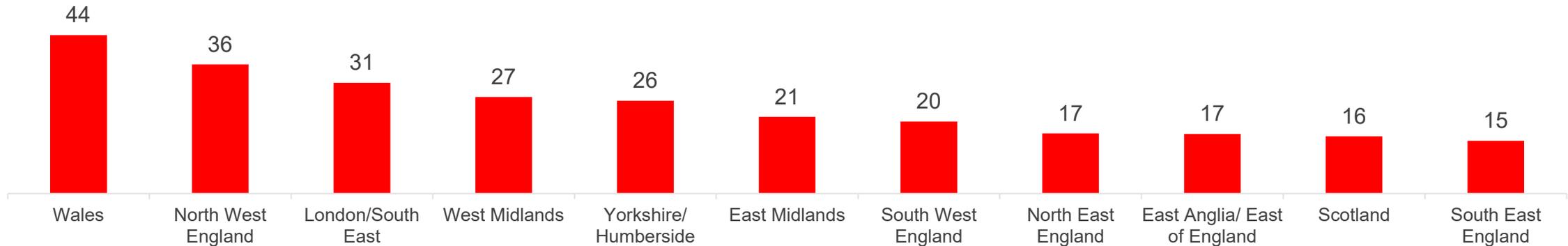
F1. Are you intending to take a holiday or short break in Wales in the next 12 months?
 F2b. And have you already taken a holiday or short break in Wales this year?

Base: All respondents n=1,146

Trips intended to Wales in next 12 months by region of residence

- Residents of Wales exhibit the highest intention of taking a holiday/short break in Wales in the next 12 months, followed by the North West of England, London/South East and the West Midlands.

Figure 44. Already booked/definitely visiting Wales in next 12 months by region of residence, All respondents



F1. Are you intending to take a holiday or short break in Wales in the next 12 months?

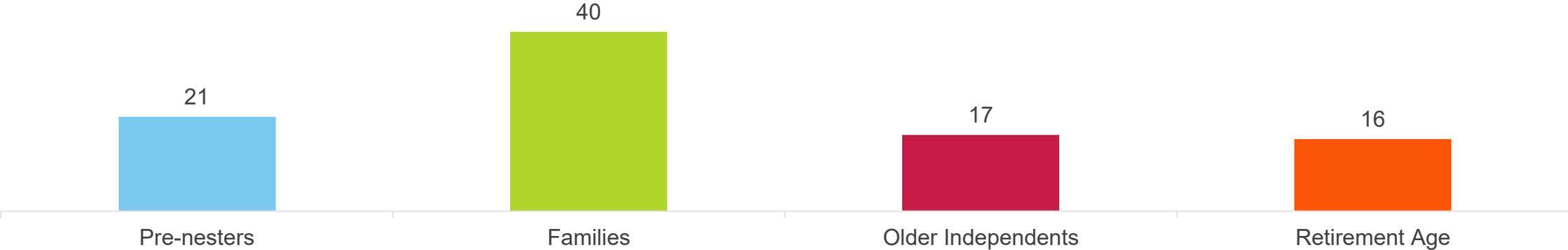
Base: All respondents. Wales n=196; North West n=111; West Mids n=100; Yorkshire n=80; London/South East n=259; South West England n=79; Scotland n=79; East Mids n=82; North East England n=38; East of England n=94



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

- Families are the life stage most likely to be 'definitely intending' to take a Wales holiday/short break in the next 12 months – 2 in 5 intending to do so.

Figure 45. 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=184; Families n=415; Older Independents n=313; Retirees n=226



Months taken or intending to take a trip in Wales

- Wales trip intenders are most likely to be planning their Wales trip in August or September 2022, family segments unsurprisingly indexing higher in August, non-family segments generally higher in September.
- When asked their preferred months for an overnight trip in Wales more generally, the window extends, 'May to June' and 'September to October' only slightly less appealing than 'July to August'.
- Both charts indicate that November to February is relatively less appealing for a Wales trip.

Figure 46. Months taken or intending to take a trip in Wales, Percentage, All respondents

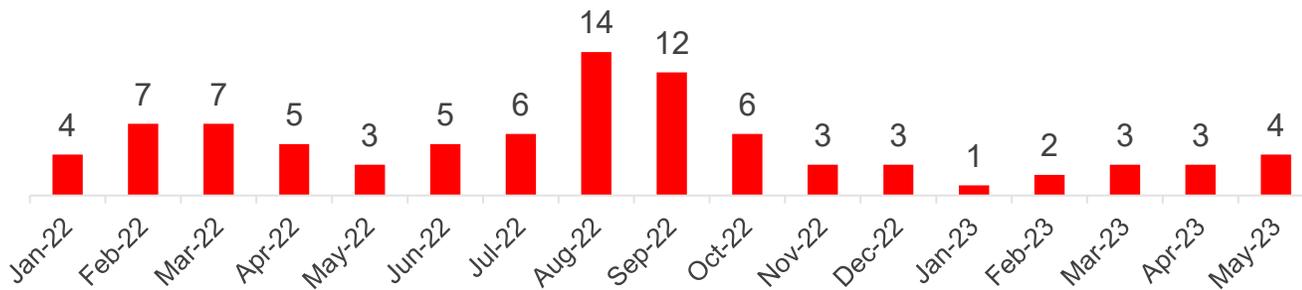
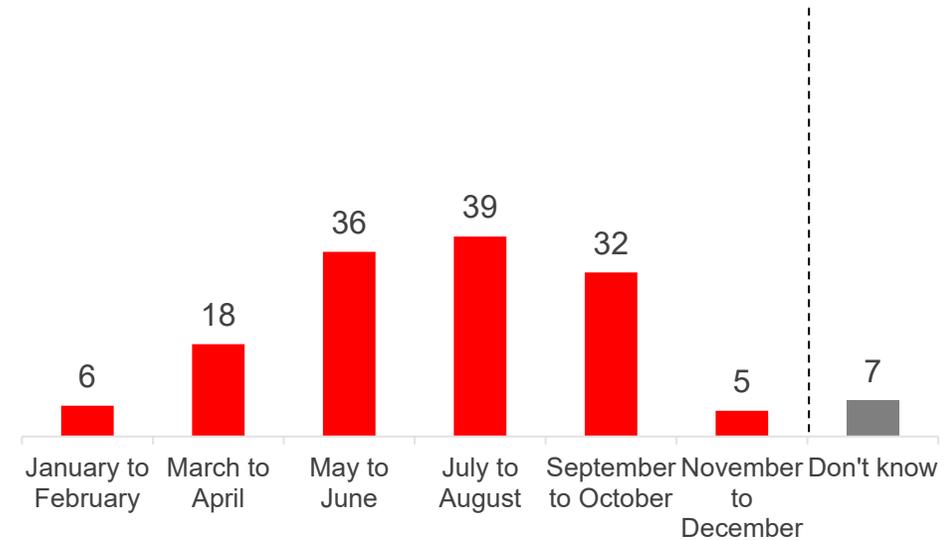


Figure 47. Preferred months for taking an overnight trip in Wales, Percentage, All respondents open to an overnight trip to Wales



F2a. When are you planning to take a holiday or short break in Wales in the next 12 months?

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

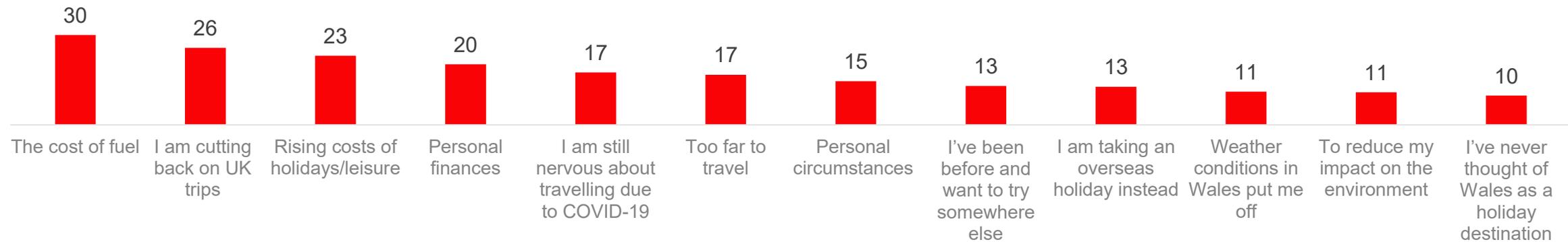
Wales? Base: All respondents n=1,146; All respondents open to taken a Wales trip n=1,000



Reason for not visiting Wales in the next 12 months

- Financial factors are a leading reason for UK holiday-makers not visiting Wales for a holiday or short break in the next 12 months – ‘the cost of fuel’ the number one reason, with ‘rising costs of holiday/leisure’ the third leading reason and ‘personal finances’ fourth. Around 1 in 4 (26%) are cutting back on UK trips, with 1 in 6 (17%) still nervous about travelling due to COVID-19.

Figure 48. Reasons for not visiting Wales for a holiday or short break in 2022, 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=500

Reason for not visiting Wales in the next 12 months

- A small number of respondents cite a range of other reasons for not planning on visiting Wales in the next 12 months – a number of them being ‘personal reasons’ such as health, limited annual leave and concerns about catching COVID.

Figure 49. Reasons for not visiting Wales for a holiday or short break in 2022, 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 12 months?

Base: All respondents not planning a trip to Wales in 2022 n=500



Visiting Wales out of season



Openness to out of season Wales short break or holiday

- Over half (57%) of the UK market 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 highest in Spring and early Autumn, and lowest between November and February.

Figure 50. Openness to out of season Wales trip, Percentage, All respondents

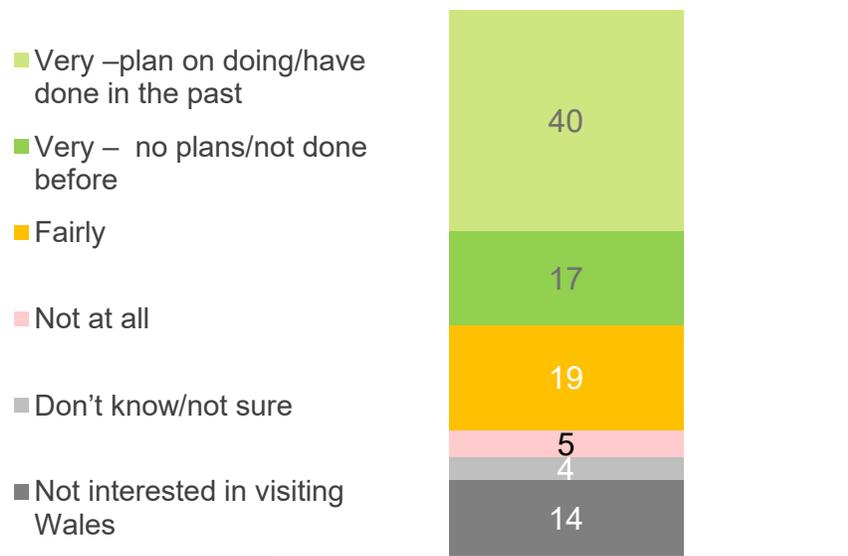
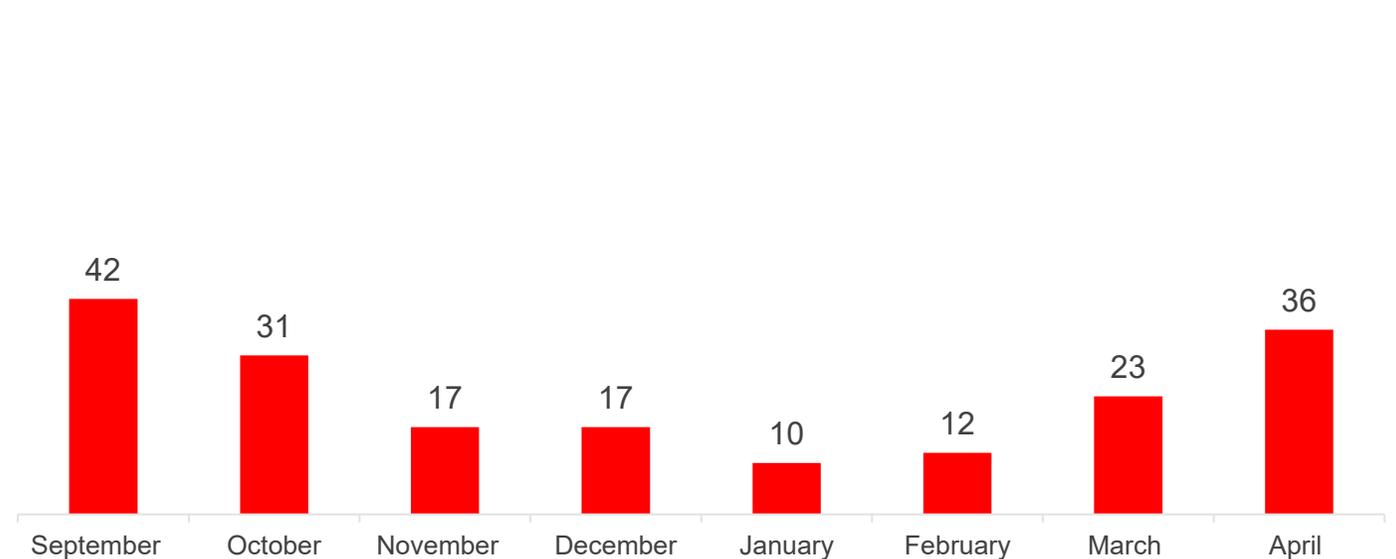


Figure 51. Months would be open to a future out of season short break or holiday in Wales, Percentage, All respondents very/fairly open to out of season trip

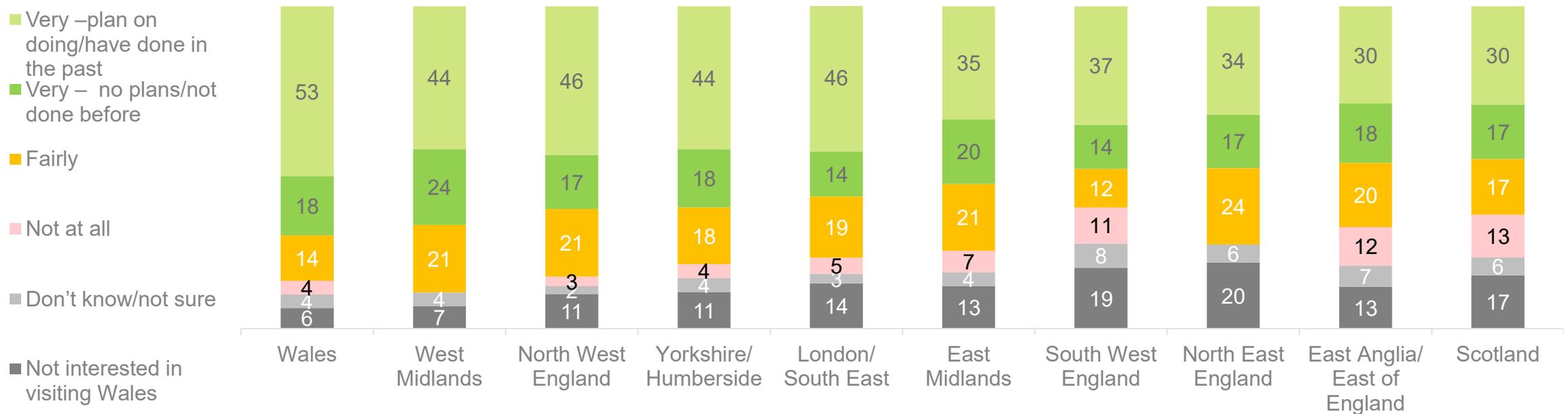


F5ii. How open would you be to taking a holiday/short break in Wales outside of the main summer season – that is between September and April? Which months would you be open to taking a future out of season short break or holiday in Wales? Base: All respondents n=1,146; Months base: All very/fairly open to out of season trip n=888

Openness to out of season Wales trip - by region of residence

- Similar to general intention to visit, residents from Wales, the West Midlands and the North West of England are most likely to be open to a short break/holiday in Wales out of season. Residents of East Anglia/Scotland are the least open to doing so.

Figure 52. Openness to out of season Wales trip by region of residence, Percentage, All respondents



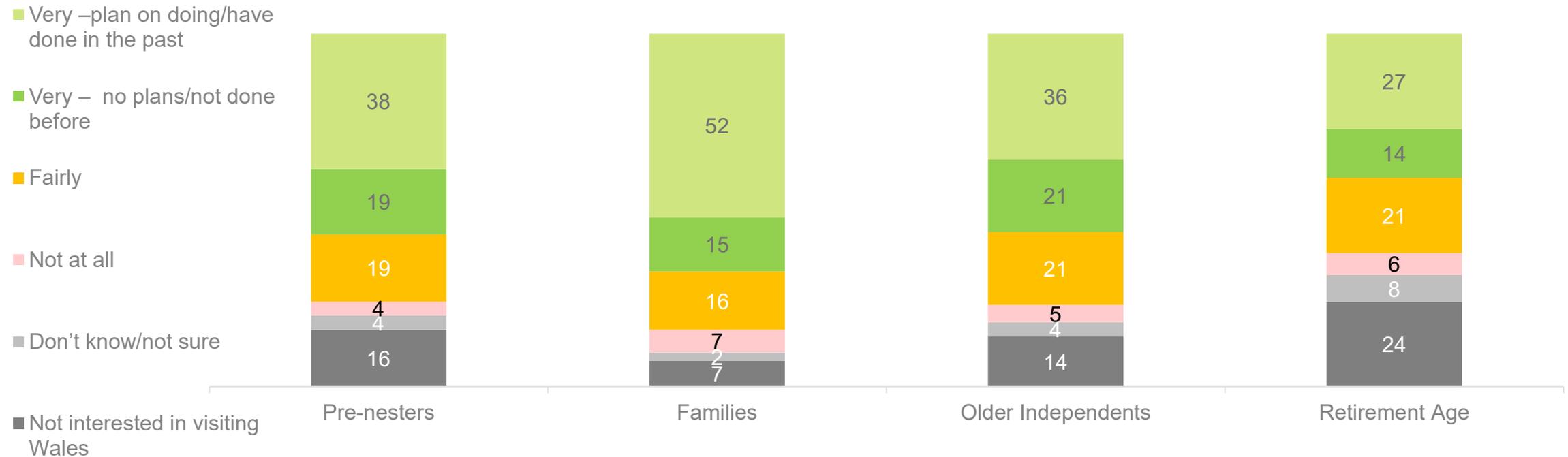
F5ii How open would you be to taking a holiday/short break in Wales outside of the main summer season – that is between September and April? Base: All respondents. Wales n=196; North West n=111; West Mids n=100; Yorkshire n=80; London/South East n=259; South West England n=79; Scotland n=79; East Mids n=82; North East England n=38; East of England n=94



Openness to out of season Wales trip - by life stage

- Also similar to general intention, families exhibit the highest interest in visiting Wales for a holiday or short break out of season.
- Older age groups show lower openness to visiting Wales out of season, which corresponds with lower intentions to visit in next 12 months and lower level of recent visitation. This contrasts with the higher number of loyal Wales visitors from these age groups.

Figure 53. Openness to out of season Wales trip by life stage, Percentage, All respondents

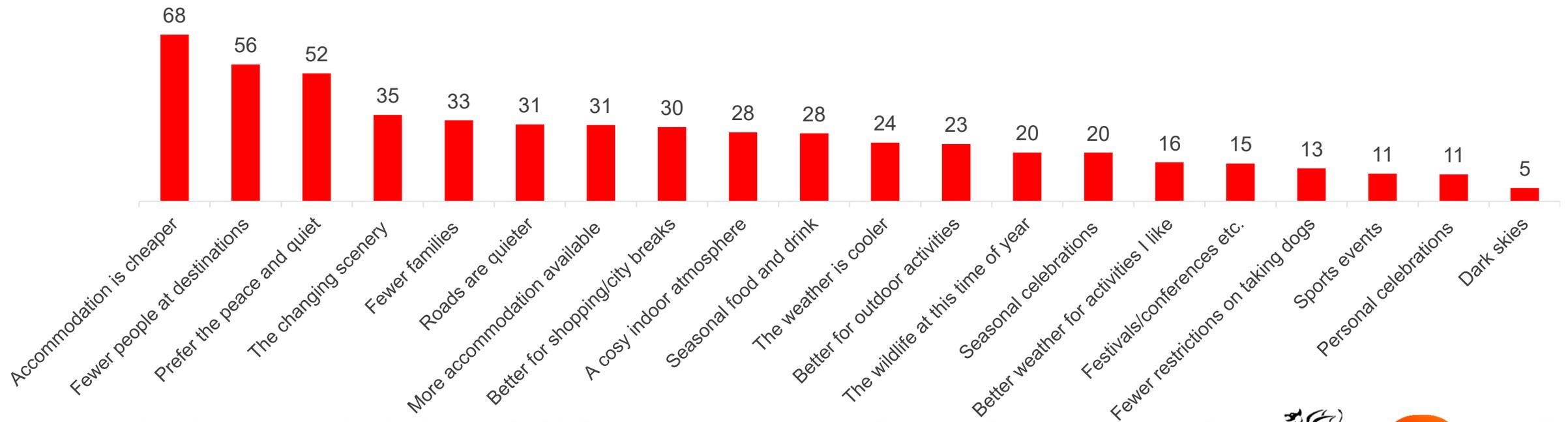


F5ii. How open would you be to taking a holiday/short break in Wales outside of the main summer season – that is between September and April? Base: Pre-nesters n=184; Families n=415; Older Independents n=313; Retirees n=226

Reasons for the appeal of an out of season Wales trip

- Openness to visiting Wales out of season is driven by a large number of reasons – ‘cheaper accommodation’ is the leading reason (68% stating this), with ‘fewer people at destinations’ (56%) and ‘prefer the peace and quiet’ (52%) close behind.
- A range of other reasons make an out of season trip appealing, including ‘the changing scenery’, ‘fewer families’ and ‘more accommodation available’.
- Enjoying seasonal and personal celebrations, festivals and events, seasonal food and drink and city breaks currently have lower appeal than enjoying the more peaceful outdoor environment, possibly linked to these being less associated with Wales.

Figure 54. Reasons for the appeal of an out of season Wales trip, Percentage, All respondents open to out of season Wales trip

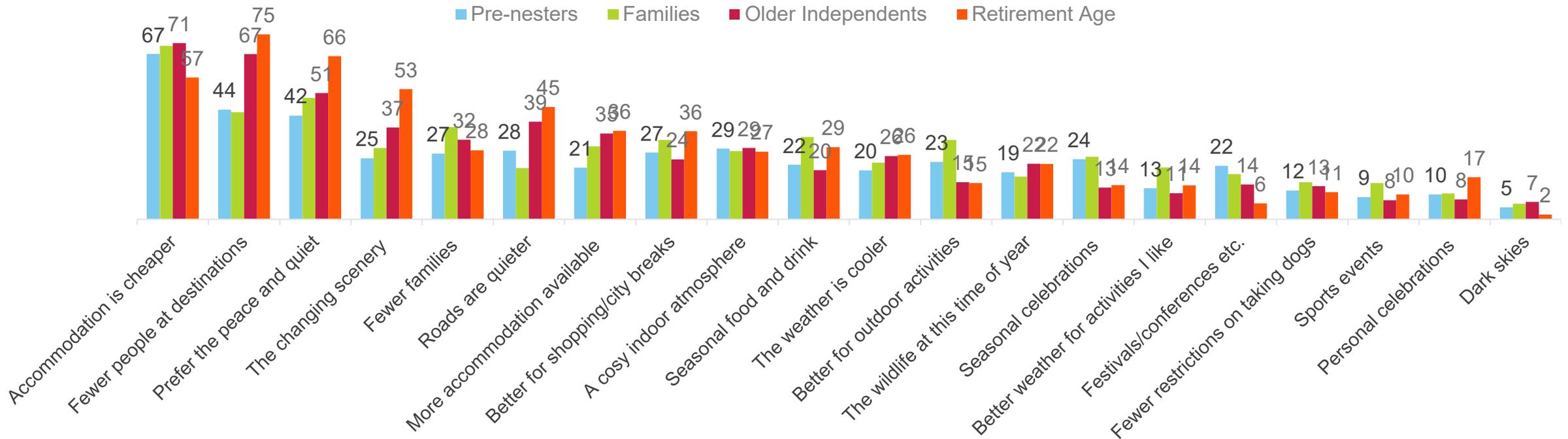


F8. Which, if any, of the following explain the appeal of an out of season holiday/short break in Wales to you?
 Base: All respondents interested in Wales out of season trip n=875

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 differs by life stage – for older life stages, fewer people are of leading importance, whilst ‘pre-nesters’ and ‘families’ index high on ‘accommodation is cheaper’ relative to other reasons.

Figure 55. Reasons for the appeal of an out of season Wales trip by life stage, Percentage, All respondents open to out of season Wales trip



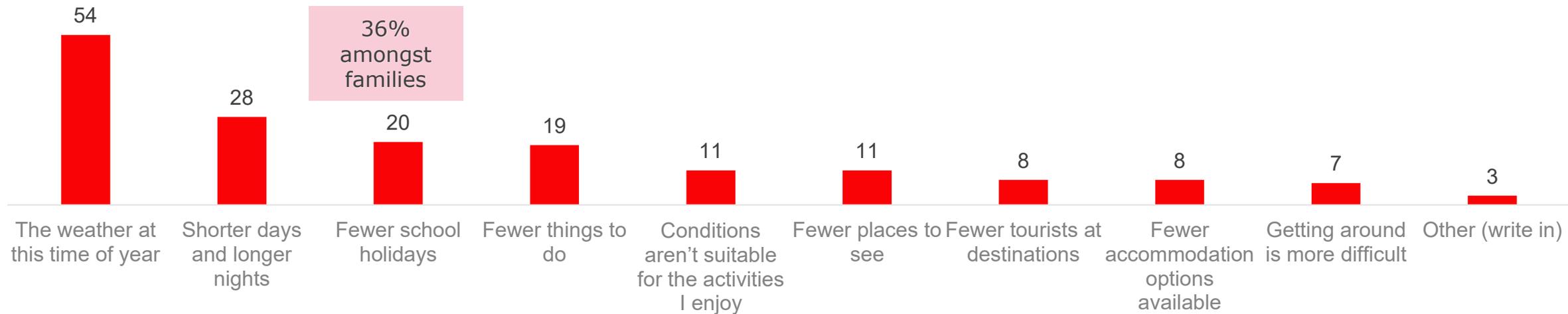
F8. Which, if any, of the following explain the appeal of an out of season holiday/short break in Wales to you?
 Base: All respondents interested in Wales out of season trip Pre-nesters n=143; Families n=352; Older Independents n=246; Retirees n=147



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 – over half stating this, followed by ‘shorter days and nights’ and ‘fewer school holidays’ (driven by families).

Figure 56. 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



36% amongst families

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?

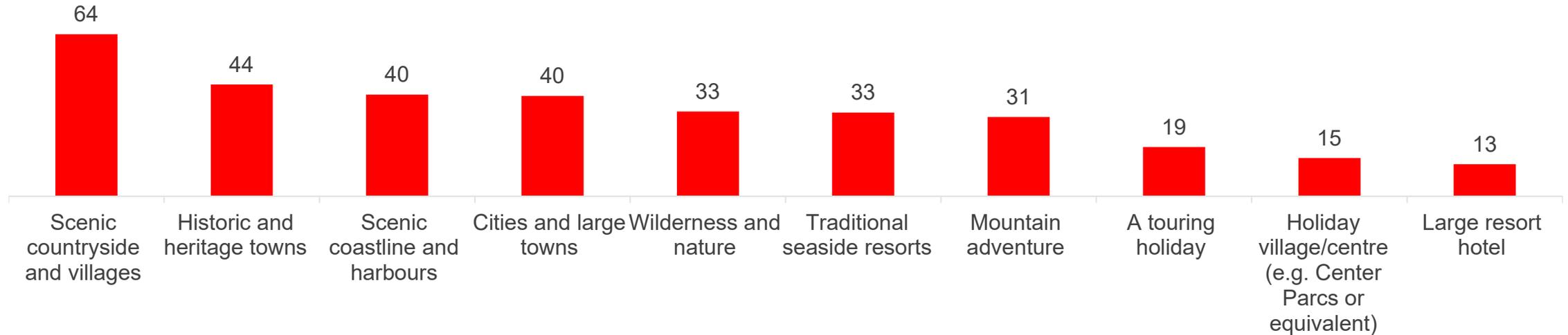
Base: All respondents fairly or not at all open to taking an out of season Wales short break/holiday n=259



Destination types seriously considering for out of season trip

- ‘Scenic countryside and villages’ is the destination UK holiday-makers would be most interested in visiting in Wales out of season, significantly above the next most preferred - ‘historic and heritage towns’.
- The destination type preference for out of season trips in Wales marks a departure from general preference for UK trips, where ‘traditional seaside resorts’, ‘scenic coastline and harbours’ and ‘cities and large towns’ are the most preferred.

Figure 57. 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



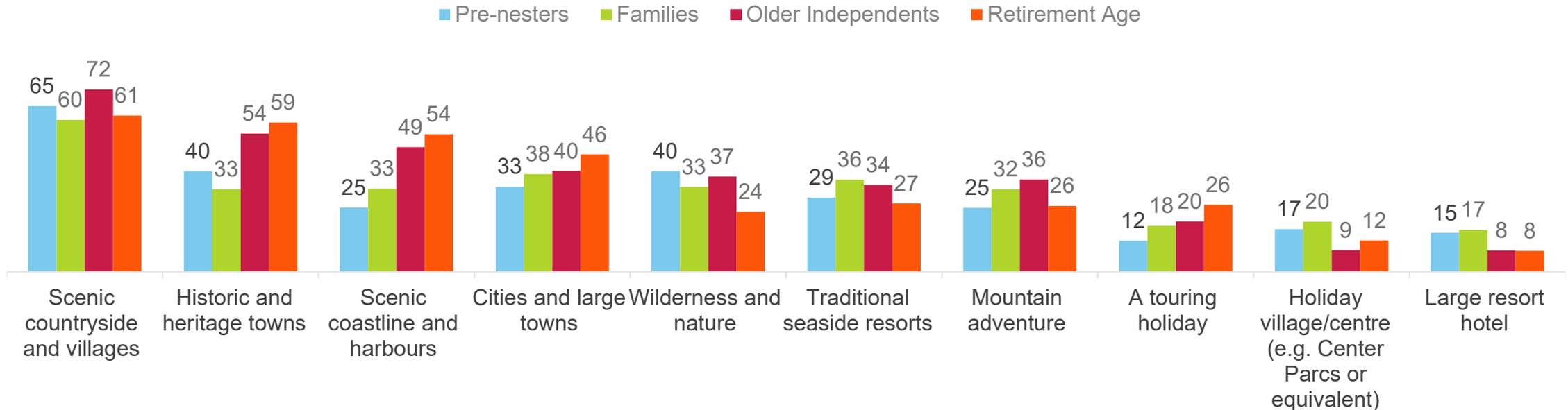
F9.Which, if any, of the following best describes the types of destination you would be most interested in visiting in Wales out of season?

Base: All respondents interested in Wales out of season trip n=875

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

- Relatively similar to general UK preference, 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’.
- However, unlike general preference there is minimal difference in preference for ‘scenic countryside and villages’ (lower for pre-nesters and families generally), or for ‘cities and large towns’ (higher for pre-nesters generally).

Figure 58. 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=143; Families n=352; Older Independents

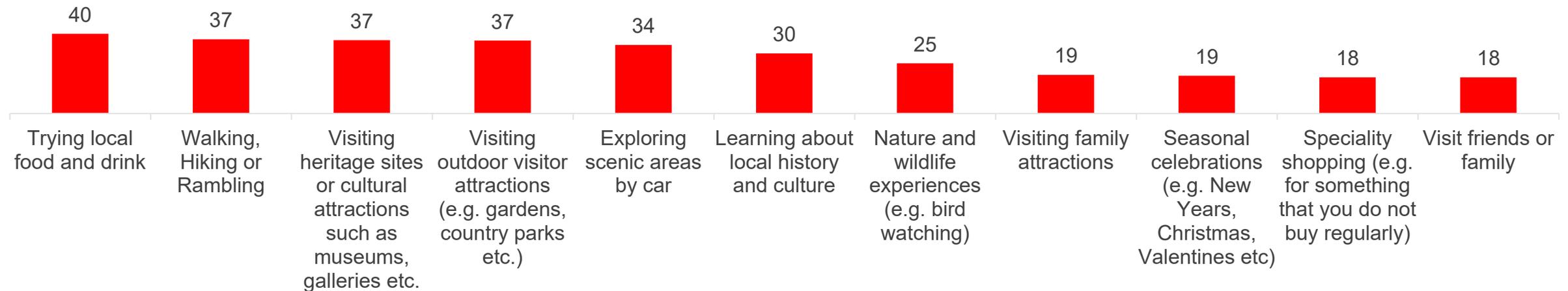
n=246; Retirees n=147



Experiences would most like to do on out of season trip

- The experiences that are regarded as most interesting on a Wales on an out of season holiday/short break, align relatively closely with the UK holiday market's most preferred experiences generally – 'trying local food and drink', 'walking, hiking or rambling', 'visiting heritages sites' and 'visiting outdoor visitor attractions' in the top 4 for both.

Figure 59. 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



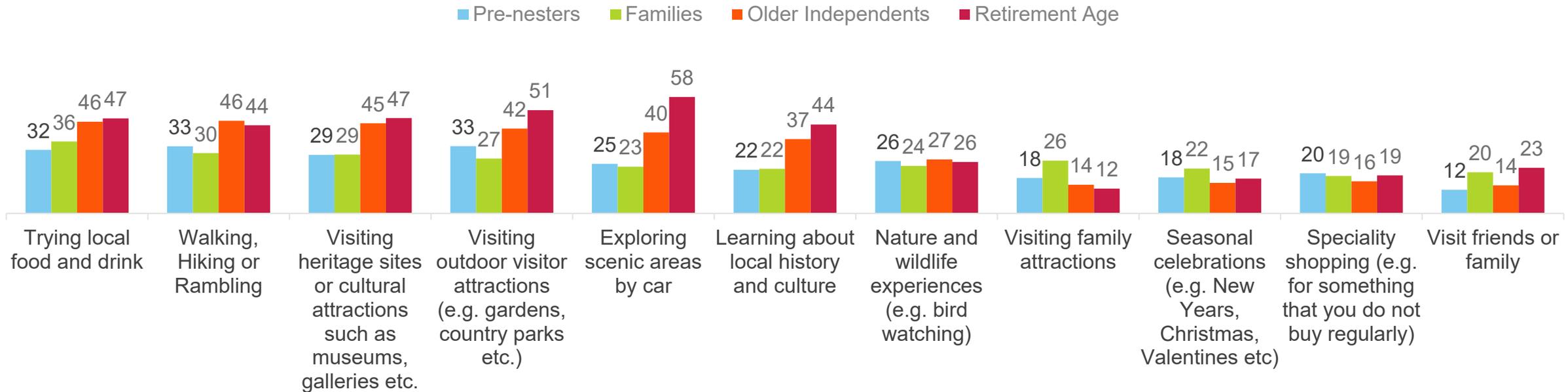
F10.Which, if any, of these activities would you be most interested in doing on an out of season trip in Wales?

Base: All respondents interested in Wales out of season trip n=875

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’, ‘visiting outdoor attractions’ and ‘exploring scenic areas by car’ for an out of season trip in Wales.

Figure 60. 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?

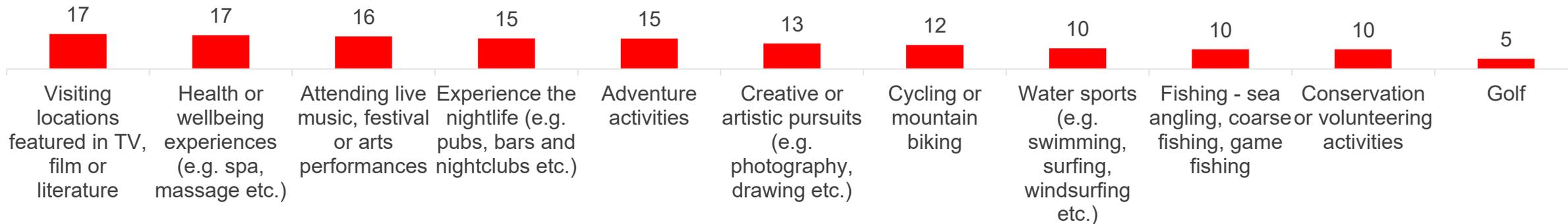
Base: All respondents interested in Wales out of season trip Pre-nesters n=143; Families n=352; Older Independents n=246; Retirees n=147



Experiences would most like to do on out of season trip

- A range of other experiences also appeal for an out of season break to Wales, including 'visiting locations featured in TV, film or literature', and 'health or wellbeing experiences'.

Figure 61. 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



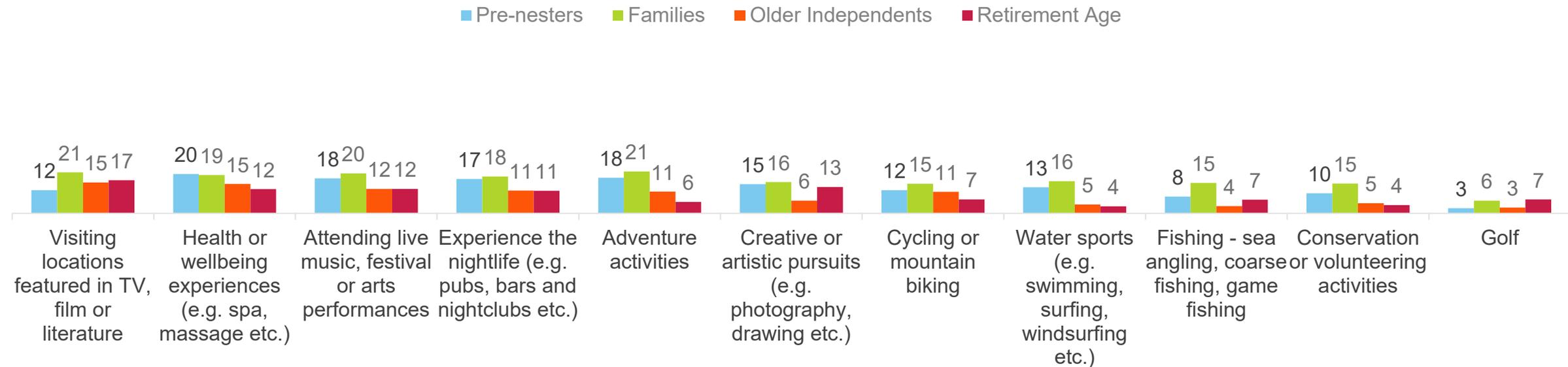
F10.Which, if any, of these activities would you be most interested in doing on an out of season trip in Wales?

Base: All respondents interested in Wales out of season trip n=875

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 62. 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?

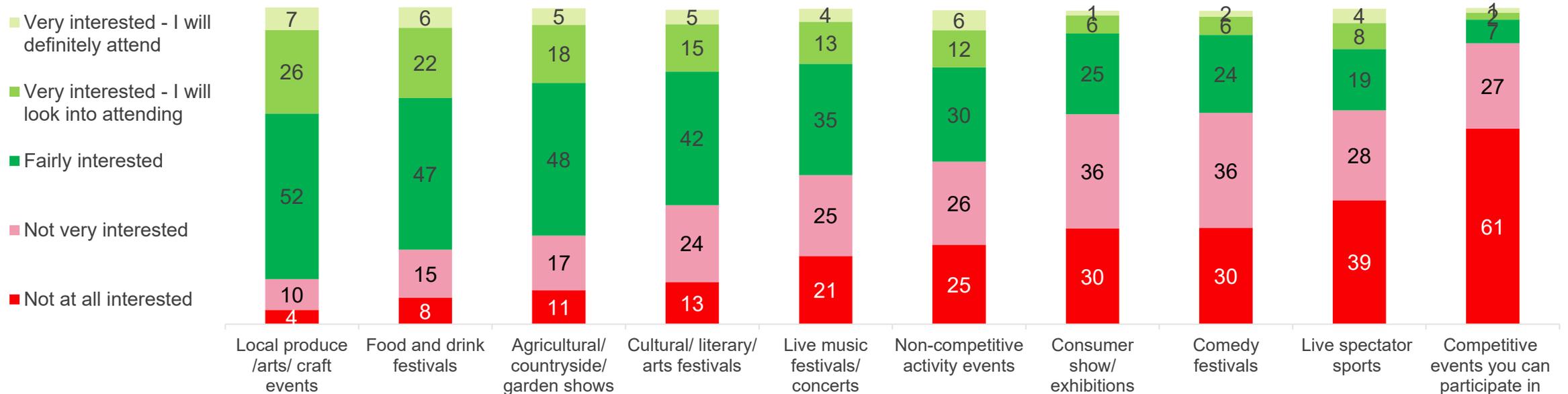
Base: All respondents interested in Wales out of season trip Pre-nesters n=143; Families n=352; Older Independents n=246; Retirees n=147



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 – ‘local produce/arts/crafts events’ the most appealing followed by ‘food and drink festivals’ and ‘agricultural/countryside/garden shows’. ‘Sports events’ appeal the least, although there is still interest from around 1 in 10.

Figure 63. 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?

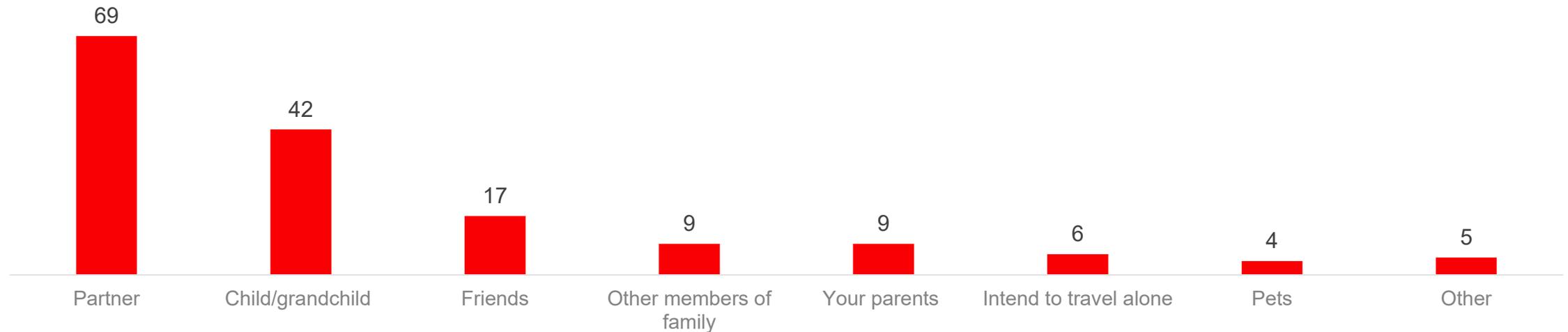
Base: All respondents interested in Wales out of season trip n=875



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



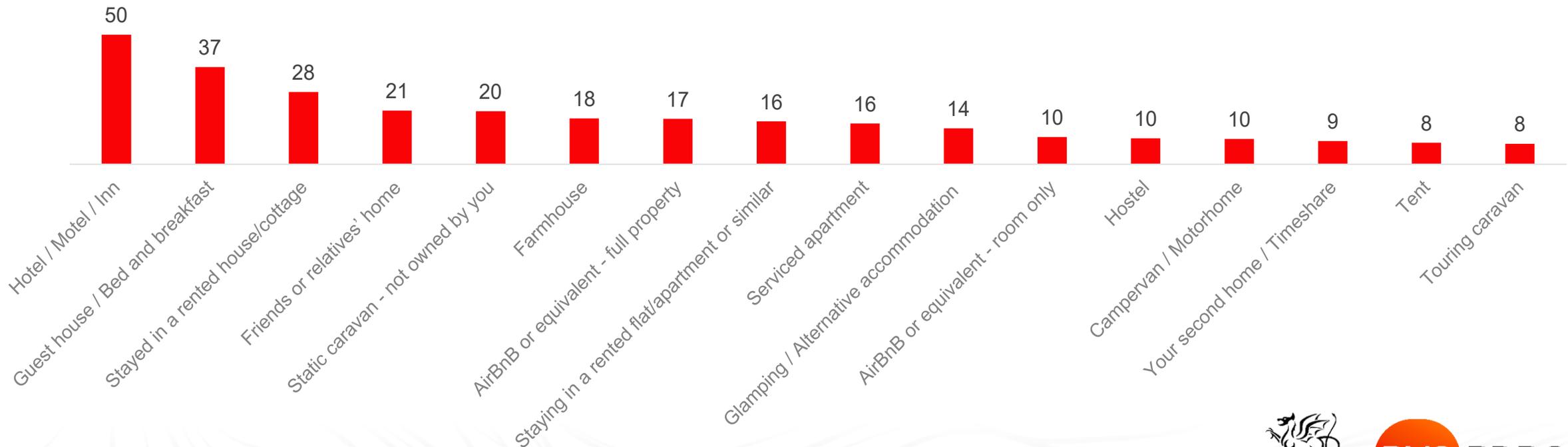
F12. Who, if anyone, would you be most likely to travel with on an out of season holiday/short break in Wales?

Base: All respondents interested in Wales out of season trip n=875

Type of accommodation for a Wales out of season trip

- 'Out of season' trip-takers to Wales would be most likely to stay in a 'hotel/motel/inn', followed by a 'guest house/B&B' and a 'rented house/cottage'.
- Compared to the typical accommodation stayed in during summer months, 'serviced accommodation' (e.g. hotel and guest house) is more prevalent for anticipated out of season trips.

Figure 65. Accommodation choice for Wales out of season trip, Percentage, All respondents open to out of season Wales trip



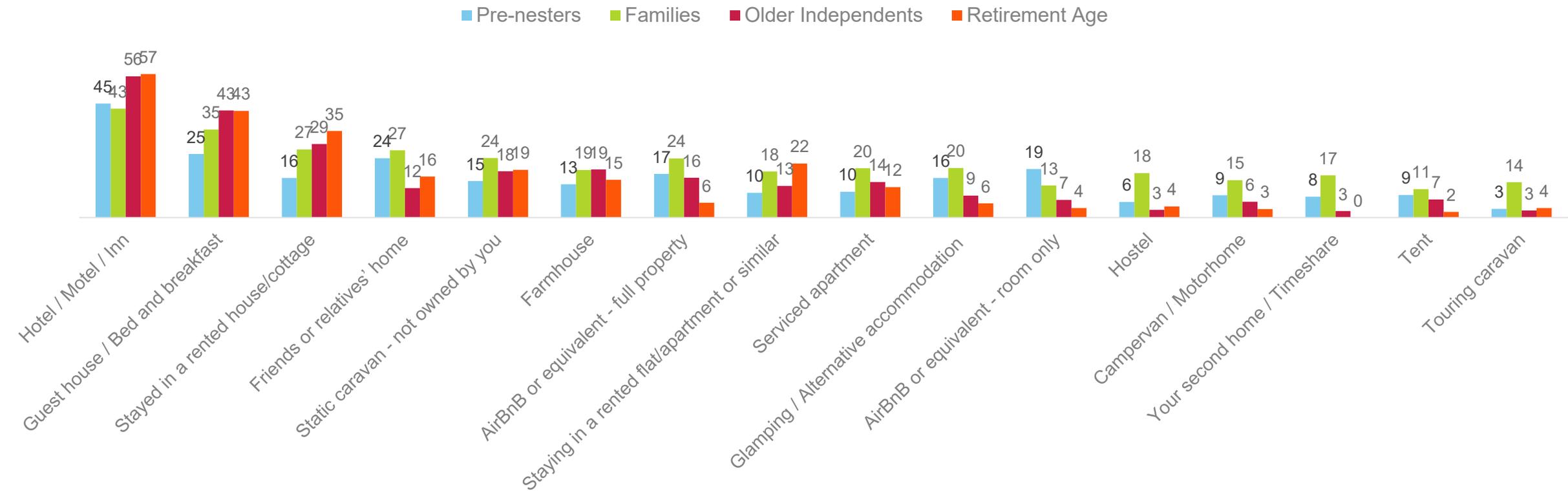
F13. What type/s of accommodation would you be most likely to stay in on an out of season holiday/short break in Wales?

Base: All respondents interested in Wales out of season trip n=875

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. Families index higher on a number of different accommodation types, particularly those relating to camping and caravans.

Figure 66. Accommodation choice for Wales out of season trip by life stage, Percentage, All respondents open to out of season Wales trip

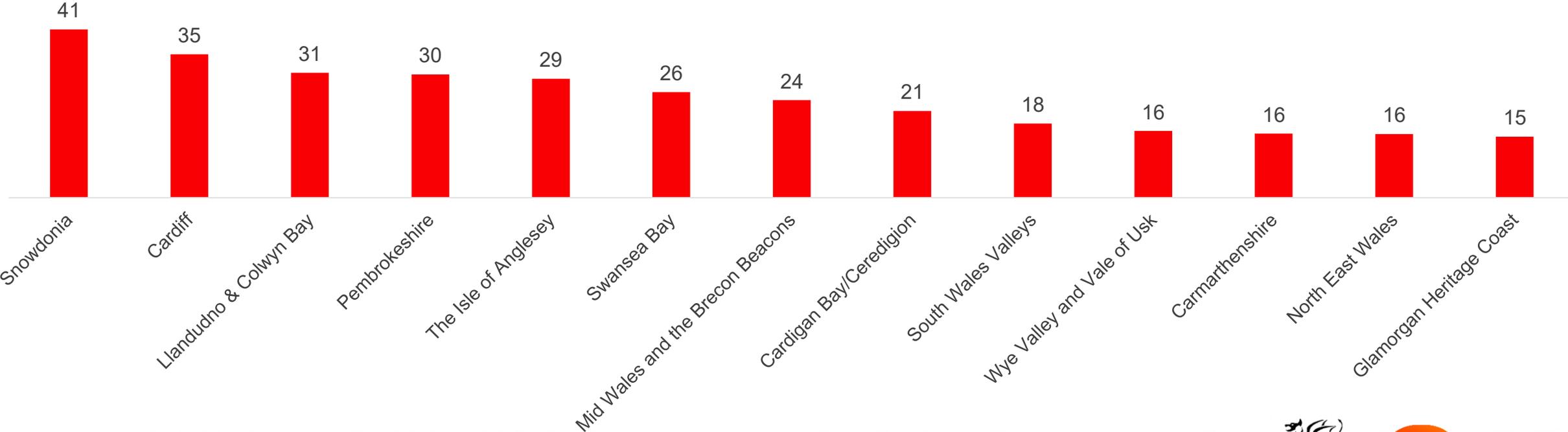


F13. What type/s of accommodation would you be most likely to stay in on an out of season holiday/short break in Wales?
 Base: All respondents interested in Wales out of season trip Pre-nesters n=143; Families n=352; Older Independents n=246; Retirees n=147

Anticipated destination for Wales out of season trip

- Similar to other times of the year, Snowdonia is regarded as the most appealing destination for a Wales out of season trip, followed by Cardiff, Llandudno & Colwyn Bay and Pembrokeshire.

Figure 67. 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=875



Planned destination for Wales out of season trip

- Generally, destination preference for a Wales out of season trip correlates with ease of access – residents of the North West of England, for example, most likely to prefer North Wales, and residents of London/South East, Cardiff. However, it's worth noting that Snowdonia is regarded as a high interest out of season destination regardless of region of residence

Table 8. Planned destination for Wales out of season trip by segment, Percentage, All respondents open to out of season Wales trip

		REGION OF RESIDENCE									
		Wales	North West England	West Midlands	London/South East	South West England	Scotland	East Midlands	Yorkshire/Humber/ East of England	North East England	East of England
ARE OF WALES FAMILIAR WITH	Snowdonia	35%	42%	44%	39%	40%	44%	52%	39%	42%	43%
	Cardiff	31%	27%	30%	40%	34%	47%	33%	30%	34%	32%
	Llandudno & Colwyn Bay	29%	51%	28%	19%	30%	27%	38%	39%	33%	29%
	Pembrokeshire	50%	23%	36%	27%	42%	31%	30%	27%	21%	34%
	The Isle of Anglesey	22%	54%	28%	22%	25%	33%	28%	26%	33%	28%
	Swansea Bay	26%	16%	24%	31%	22%	33%	20%	26%	31%	29%
	Mid Wales and the Brecon Beacons	32%	19%	30%	21%	35%	31%	27%	15%	32%	18%
	Cardigan Bay/Ceredigion	29%	14%	25%	23%	17%	29%	21%	14%	23%	21%
	South Wales Valleys	13%	15%	6%	22%	29%	29%	17%	11%	20%	20%
	Wye Valley and Vale of Usk	19%	12%	16%	15%	33%	14%	17%	12%	19%	19%
	Carmarthenshire	29%	12%	18%	14%	11%	22%	23%	12%	14%	17%
	North East Wales	14%	22%	14%	13%	9%	15%	11%	26%	20%	13%
	Glamorgan Heritage Coast	13%	8%	12%	17%	16%	23%	18%	12%	14%	18%
	None of these	1%	2%	2%	2%	0%	4%	3%	0%	0%	1%

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. Wales n=196; North West n=111; West Mids n=100; Yorkshire n=80; London/South East n=259; South West England n=79; Scotland n=79; East Mids n=82; North East England n=38; East of England n=94



Trip length and time of week

- Around half of those open to an out of season Wales trip, would anticipate it being a 'short break of 1-3 nights', over 2 in 5 a longer break of 4+ nights.
- A mid-week trip (Monday to Friday) is the preferred time of taking the trip (42% stating this), although only a slightly smaller proportion (37%) favour a long weekend.

Figure 68. Anticipated length of out of season trip, Percentage, All respondents open to out of season Wales trip

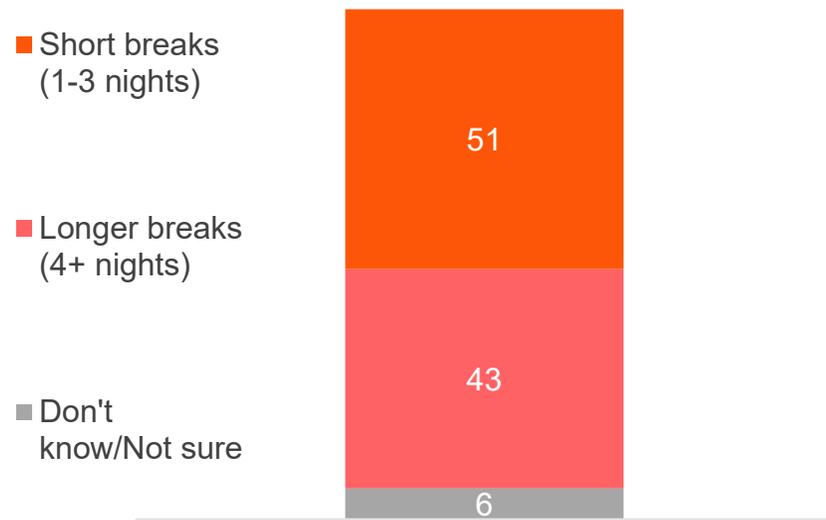
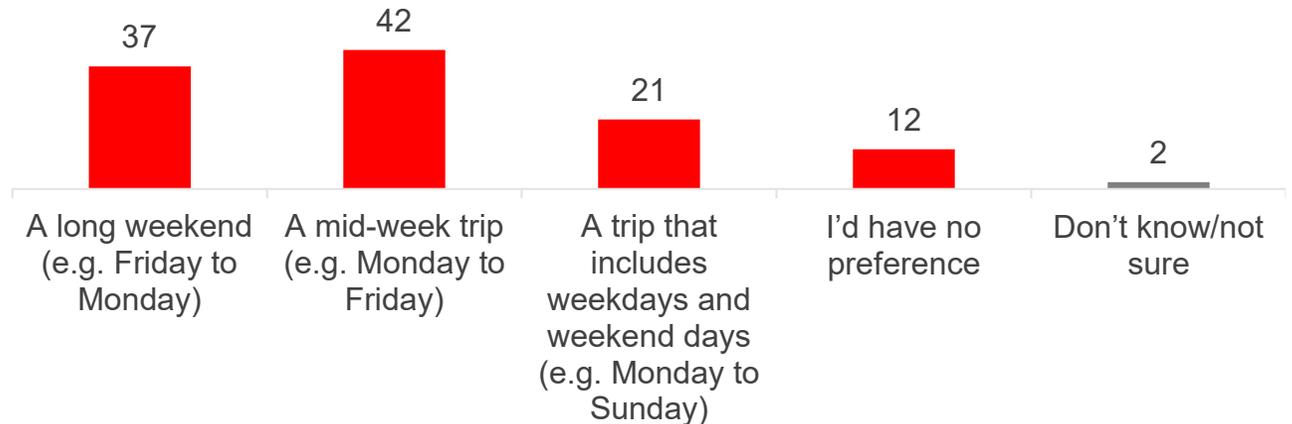


Figure 69. Anticipated time of week for out of season Wales trip, Percentage, All respondents open to out of season Wales trip



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 n=1,146

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, whilst retirees favour a longer trip.
- Retirees also index significantly higher on ‘mid-week’ trips and lower on ‘long weekends’ – the latter favoured by pre-nesters.

Figure 70. Anticipated length of out of season trip by life stage, Percentage, All respondents open to out of season Wales trip

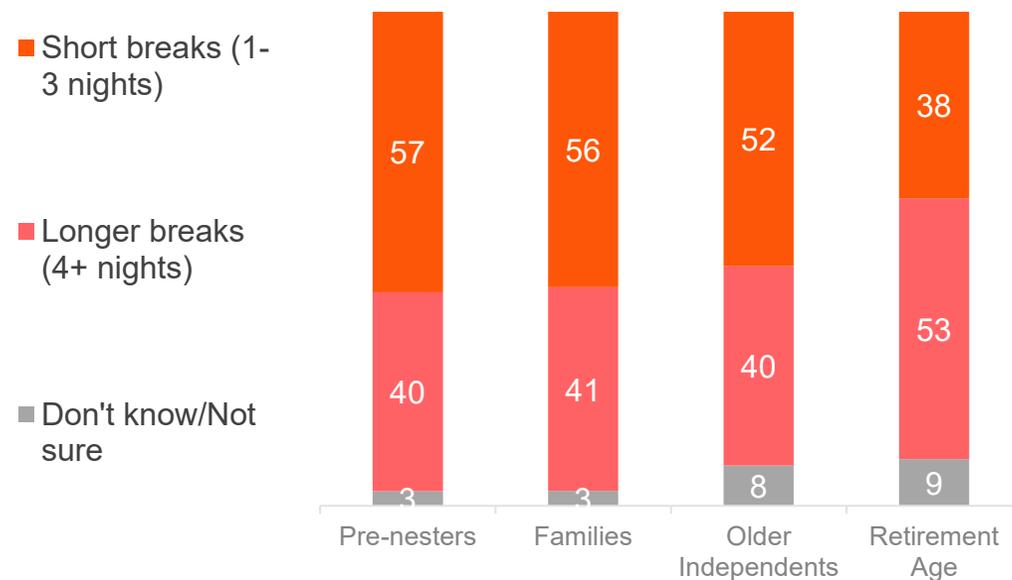
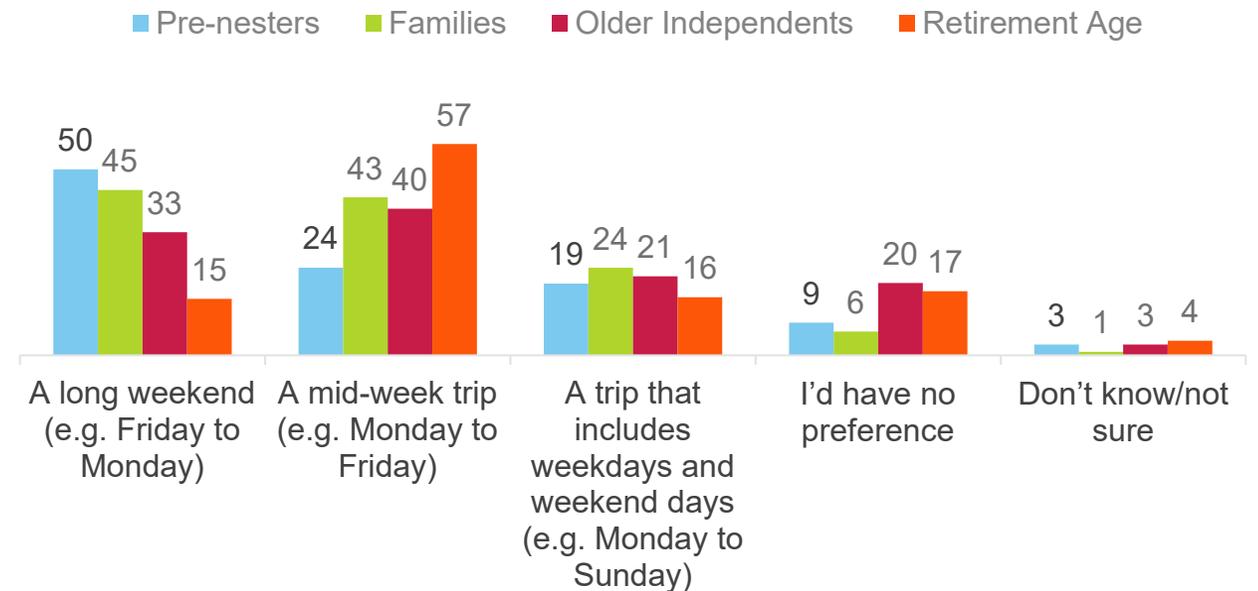


Figure 71. Anticipated time of week for out of season Wales trip by life stage, Percentage, All respondents open to out of season Wales trip



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=143; Families n=352; Older Independents

n=246; Retirees n=147



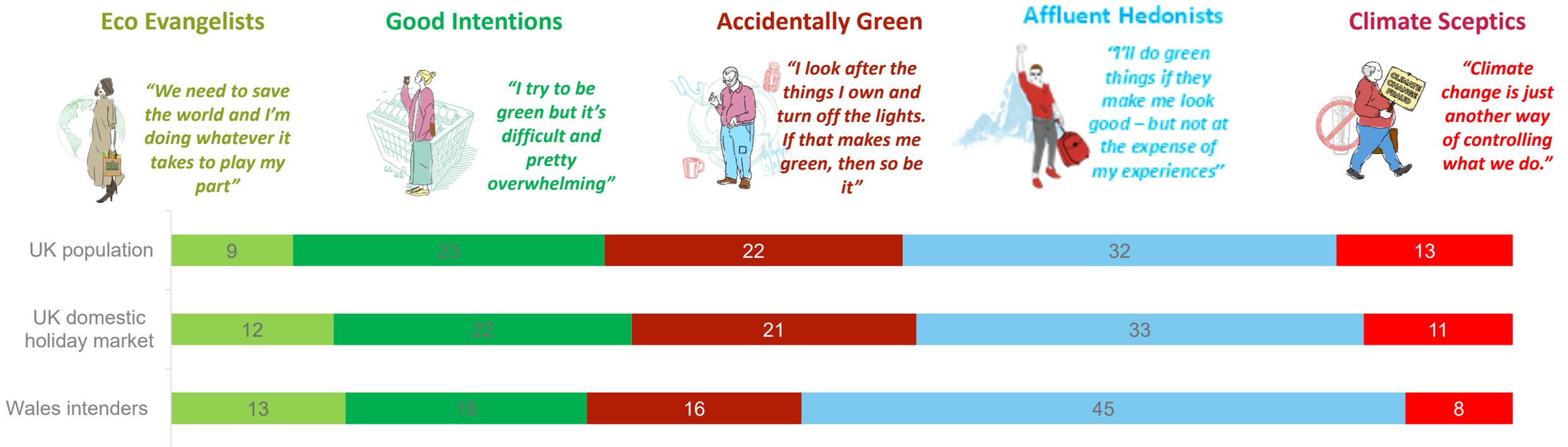
Understanding Attitudes to Sustainability



Breakdown of BVA BDRC sustainability segments

- Wales trip-takers index above the UK population on the 'Eco Evangelist' sustainability segment (13% compared to 9% in the population) and 'Affluent Hedonists' – a segment that signals interest in green issues, but doesn't follow through with any 'green actions' and prioritises experiences (45% compared to 32% in the population).

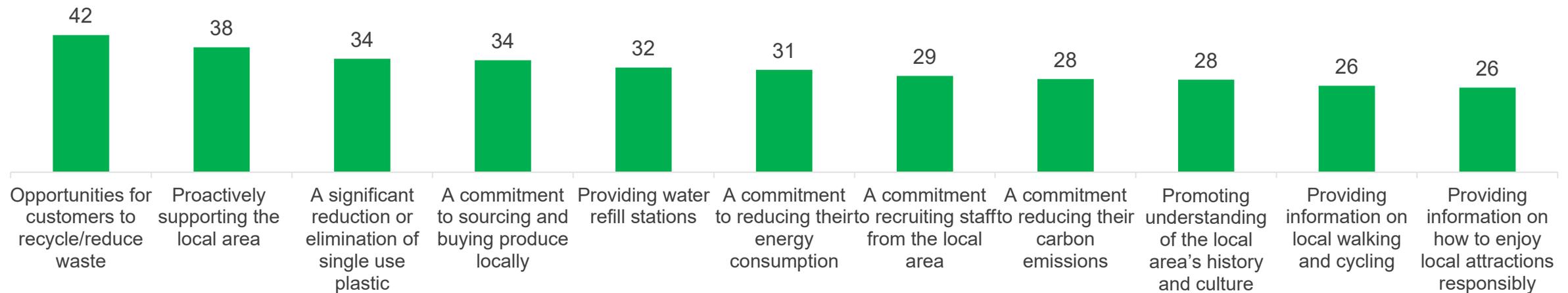
Figure 72. Breakdown of Visit Wales intenders by BVA BDRC sustainability segments



Sustainable actions tourism businesses should prioritise

- Reducing/recycling waste and supporting the local area are the two main priorities the UK holiday market think tourism businesses should prioritise to become more sustainable, followed by 'significantly reducing single-use plastic' and 'sourcing produce locally'. There is also support for a range of other initiatives including 'providing water refill stations' and 'a commitment to reducing energy consumption'.

Figure 73. Sustainable actions tourism businesses should prioritise, Percentage Top 11, All respondents



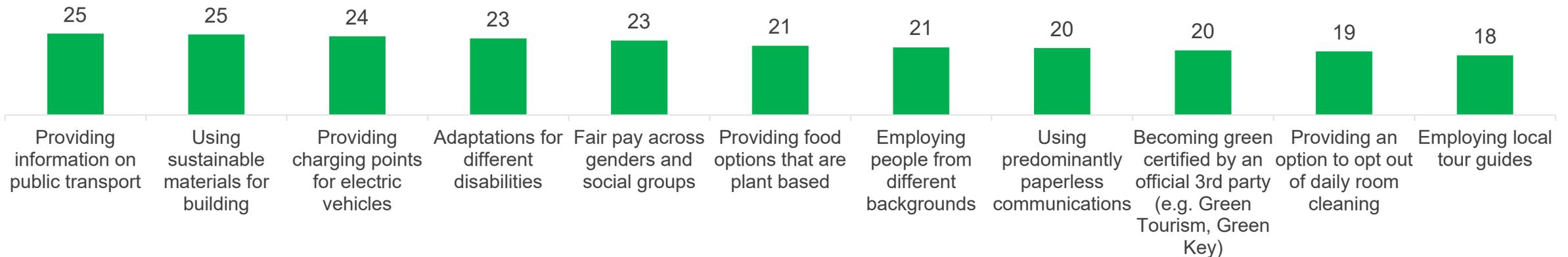
G7. Which, 3-4 of the following actions do you believe are most important for tourism businesses to take to become more sustainable? G8. And which 3-4 of these actions do you believe are most important for tourism businesses to take to become more sustainable?

Base: All respondents n=1,146

Sustainable actions tourism businesses should prioritise

- ‘Employing local tour guides’ and ‘providing an option to opt out of daily room cleaning’ are regarded as lower priorities for tourism businesses. Notably, ‘accreditation’ is also at the bottom end of the priority list.

Figure 74. Sustainable actions tourism businesses should prioritise, Percentage, Bottom 11, All respondents



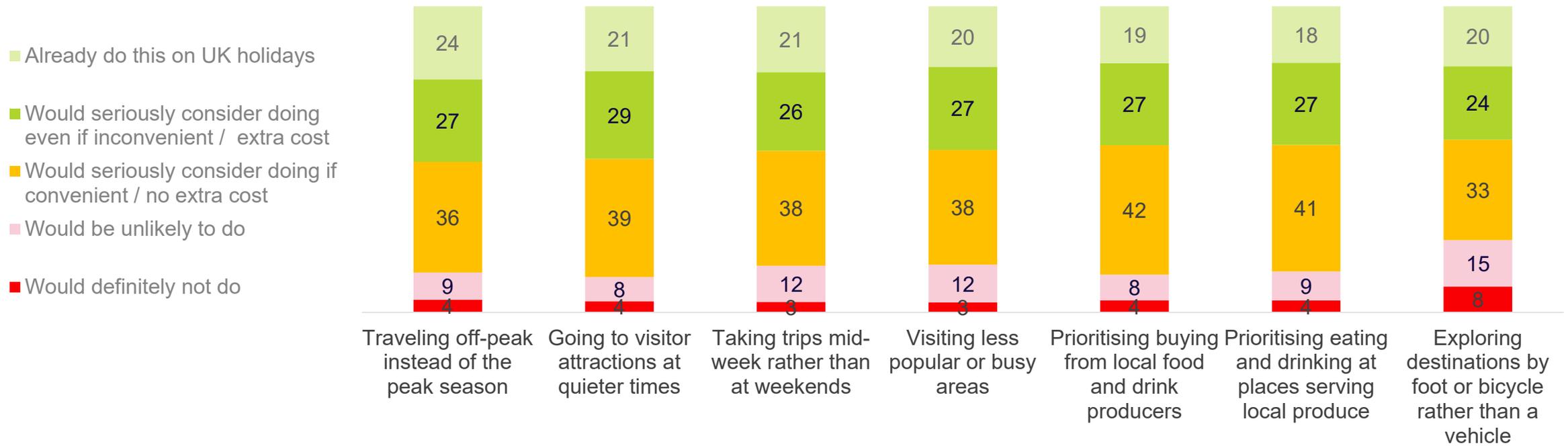
G7.Which, 3-4 of the following actions do you believe are most important for tourism businesses to take to become more sustainable? G8.And which 3-4 of these actions do you believe are most important for tourism businesses to take to become more sustainable?

Base: All respondents n=1,146

Attitudes to individual sustainable actions on domestic trips

- In terms of sustainable actions for the individual, the UK holiday market are most likely to 'already do/would seriously consider if no extra cost', 'travelling off-peak instead of the peak season', 'going to visitor attractions at quieter times' and 'visiting less popular or less busy areas'.

Figure 75. 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?

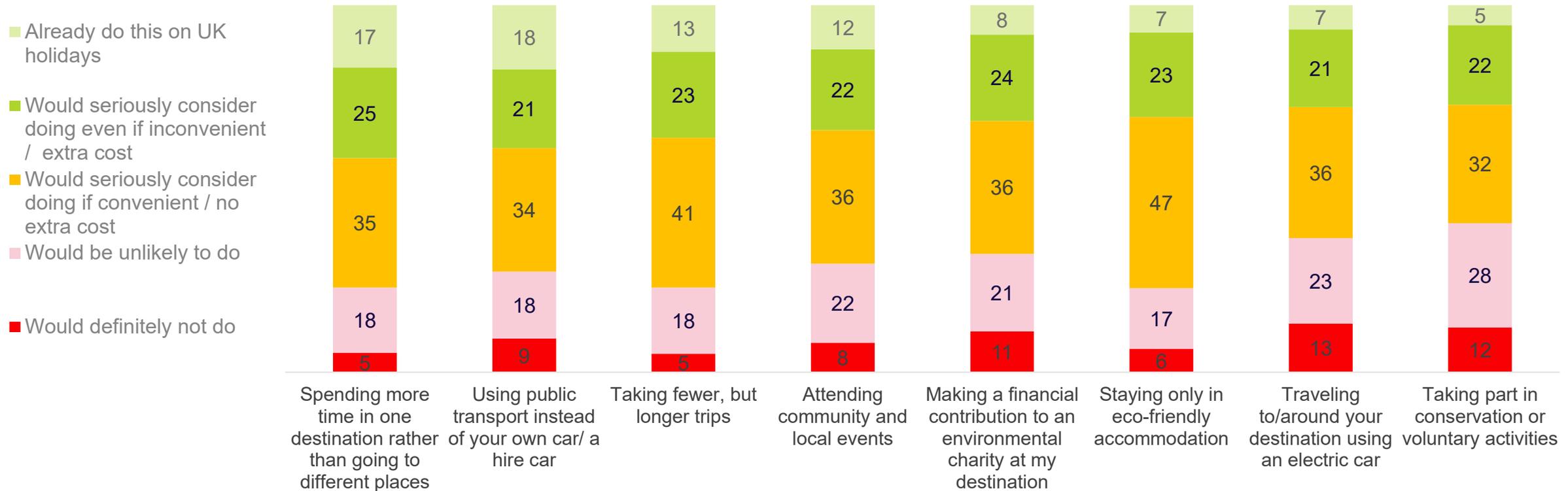
Base: All respondents n=1,146



Attitudes to individual sustainable actions on domestic trips

- ‘Taking part in conservation or voluntary activities’ and ‘travelling to/around a destination using an electric car’ are the individual sustainable actions the UK holiday market are least likely to consider doing, although there remains majority support for them.

Figure 76. 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=1,146



Appendix



Statistical significance

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

Base	Survey finding of...		
	5 / 95%	20 / 80%	50 / 50%
Total Sample (1,146)	+/- 1.3%	+/- 2.3%	+/- 2.9%
Non-Wales intenders (500)	+/- 1.9%	+/- 3.5%	+/- 4.4%
Shown TV advert (382)	+/- 2.2%	+/- 4.0%	+/- 5.0%