



Visit Wales Tourism Market Demand Report – Ireland January 2023

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This document is also available in Welsh.

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

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Contents

Chapter	Page number
<u>Background and Methodology</u>	4
<u>Key findings</u>	9
<u>Demographics of the Ireland Holiday Market</u>	16
<u>Trip Influences and Preferences</u>	22
<u>Destination Relationships and Previous Visits</u>	35
<u>Wales Visitation in 2022</u>	44
<u>Non-visitors to Wales in 2022</u>	52
<u>Visits to Wales in 2023</u>	57
<u>Barriers to visiting Wales in 2023</u>	73
<u>The Appeal of Touring/Trails</u>	77
<u>Marketing Impact</u>	88
<u>Promotion and awareness of Wales from Football World Cup (November 2022)</u>	98
<u>Appendix</u>	102

Background and Methodology



Background

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

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

Methodology

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

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

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

There were 599 completed surveys. The data was then weighted to be representative of Irish residents likely to take a UK trip in the next few years, ensuring comparability to previous studies. Data was weighted by gender, age, social grade and region of residence.

The survey took 25 minutes to complete on average.

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

Definitions used within this report (1)

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

- **The Irish holiday market:** The total survey sample – residents of the Republic of Ireland who are holiday or short break decision-makers and are very or fairly likely to take a UK holiday or short break in the next few years.
- **Wales trip takers:** Residents of the Republic of Ireland who stated they took a holiday or short break in Wales in 2022. Trip behaviour for this audience relates to the whole year.
- **Wales trip intenders:** Residents of the Republic of Ireland who are definitely or probably intending to take a holiday or short break in Wales in the next 12 months. Trip behaviour for this audience relates to their next trip planned in Wales so will be naturally biased to earlier in the year. With this in mind, trips planned for 2023 should not be compared to trips taken in 2022

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

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

In some cases within this report, life stages (and other sub-groups) are reported on 'indicatively'. This means that sample/base sizes are low and commentary should be treated with caution – as 'indicative' only. Where charts are based on low sample sizes (below n=50), they are marked with an asterisk – these figures should also be treated with caution.

Definitions used within this report (2)

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

- **A Higher managerial, administrative and professional**
- **B Intermediate managerial, administrative and professional**
- **C1 Supervisory, clerical and junior managerial, administrative and professional**
- **C2 Skilled manual workers**
- **D Semi-skilled and unskilled manual workers**
- **E State pensioners, casual and lowest grade workers, unemployed with state benefits only**

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

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

Key Findings



Key findings (1)

The Irish Holiday Market

1. This research identifies the Irish holiday market as those who live in the Republic of Ireland, are holiday decision-makers and are very/fairly likely to take a holiday or short break in the UK in the next few years.
2. Families are the largest life stage in the Irish holiday market (34%), followed by Older Independents (31%), Pre-nesters (18%) and Retirees (17%).
3. The Irish holiday market is skewed towards ABC1 socio-economic groups, making up 3 in 5 of the market. However, nearly 7 in 10 have been 'hit hard' or are 'having to be careful' due to the cost-of-living crisis.
4. The region of residence of the Irish holiday market broadly replicates the Irish population and is spread across the regions of the Republic of Ireland – Dublin (28%), Leinster (27%), Munster (27%) and Connacht-Ulster (18%).

Key findings (2)

Trip Influences and Preferences –UK Holidays

1. 'Great value for money' is the number one influence for a holiday or short break in the UK amongst the Irish holiday market. Coupled with the majority having been 'already hit hard' or 'being careful' due to the cost-of-living crisis, it's likely that lower-priced or 'good value' trip options will be more favoured than in previous years. This is particularly the case for lower social grades, and those more vulnerable to the rising cost-of-living, who are more likely to look for cheaper accommodation options, free things to do and deals or special offers.
2. 'Ease of travel to and getting around the destination' is the next most important influence for the Irish holiday maker – an area where Wales is in a relatively strong position given its transport links from the East Coast of Ireland.
3. Beyond these practical factors, 'incredible scenery and landscapes', 'famous landmarks and visitor attractions', and 'a destination rich in history and heritage' are the next most important influences.
4. The Irish holiday market tends to favour urban destinations – 'cities and large towns' is the destination type they are most seriously considering for a UK trip in the next few years, followed by 'historic or heritage towns'. Beyond this, 'scenic coastlines and harbours' and 'scenic countryside and villages' are the next most popular destination types. Purely rural destination types such as 'wilderness and nature' and 'mountain adventure' are less favoured, although remain a consideration for around 1 in 4.
5. 'Cities and large towns' is the leading destination type for all life stages. But there is some variation amongst other destination types. 'Older' life stages such as older independents and retirees are more likely to consider 'historic and heritage towns' and 'scenic countryside and villages'. Pre-nesters have a higher preference for 'mountain adventure' and 'wilderness and nature' than other life stages. Alongside pre-nesters, families index higher for 'holiday village/centres', 'large resort hotels' and 'traditional seaside resorts'.
6. The experiences sought by the Irish holiday market tend to reflect destination preferences. Beyond 'trying local food and drink' and 'visiting friends or family', they are most likely to be interested in 'visiting heritage sites', 'visiting outdoor attractions', 'exploring scenic areas by car', and 'learning about local history and culture'.
7. Older life stages are more likely to favour experiences relating to history, heritage and scenic areas. Pre-nesters prefer a more active trip that also takes in nightlife and entertainment venues – indexing higher for 'activities and things to do', 'adventure activities', 'water sports', 'a thriving culture and entertainment scene' and 'live music'. Families also seek out 'water sports' alongside 'family attractions'.

Key findings (3)

Destination Relationships and Trips to Wales in 2022

1. England and Northern Ireland are the areas of the UK the Irish holiday market have the closest relationship with in terms of holidays and short breaks. Wales is the part of the UK that has attracted the lowest historic visits, although regular visitation is on a par with Scotland – both visited in 2022 by 7%.
2. Dublin residents exhibit the strongest 'loyalty' to Wales as a destination and the highest visits in 2022, although historic visits are only marginally ahead of other parts of the Republic of Ireland.
3. Younger life stages report the highest proportion of regular visits, as well as the highest recency. Around a third of each life stage has never been to Wales and would like to, suggesting strong potential to convert to visits. However, with younger life stages more likely to be planning a visit to the UK in the next few years, the potential is stronger with this audience.
4. There are minimal differences in relationship with Wales by segment, with the exception of Sightseers who are likely to have visited Wales at least regularly or sometimes.
5. Amongst those who visited Wales in 2022, Wales was the first-choice destination for over half – around a third stating it was a replacement for an overseas trip elsewhere, and 1 in 10 for a trip elsewhere in the UK.
6. Trips from Ireland peaked in July and were predominantly short breaks. Two thirds of parties travelled with a partner and half with children or grandchildren.
7. Aligned with general preferences, 'cities or large towns' and 'historic or heritage towns' were the leading destination types for 2022 trips to Wales, although a range of other destinations types were also visited – the least popular visited by 18%.
8. North Wales was stayed in by the majority of Wales overnight visitors at 70% - North East Wales, Llandudno & Colwyn Bay and Anglesey driving this percentage. Around 3 in 10 visitors from the Irish Market stayed in each of Mid Wales, South West Wales and South East Wales.

Key findings (4)

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

1. Around 1 in 7 (15%) of the 'Irish holiday market' have either 'already booked' or 'are definitely visiting' Wales for a holiday/short break in 2023 with a further 1 in 5 indicating they will 'probably' visit. Only a minority have 'already booked' their trip however.
2. Families are more likely to indicate they will visit Wales for an overnight trip. Pre-nesters also demonstrate a strong interest, although this is more driven by 'probably' rather than 'definitely'. Older independents and retirees are the least likely to be intending a Wales trip, although a larger than average proportion have not yet decided on their trip, suggesting there is potential to convert this audience.
3. Aligned with historic visits, residents of Dublin are the most likely to be planning an overnight trip to Wales in the next 12 months, followed closely by residents of Leinster. Experience seekers and Cultural Buffs are the segments most likely to have 'already booked' or to be 'definitely visiting' Wales for an overnight holiday or short break in 2023. Adventurers and Explorers are less likely to be certain of a visit but a notable minority (23% and 19% respectively) state they will 'probably' visit.
4. There is relatively even interest in taking a Wales trip between the spring and summer months of April and September. The autumn and winter months of January to March and October to December are less appealing for this market. Intended trips are predominantly short-breaks, although longer trips are favoured in July and August.
5. A broad range of destination types are being considered for trips in Wales in 2023 – 'historic or heritage town' and 'scenic countryside or village' the leading types (intended by 3 in 10) and 'holiday/village centre' the least preferred (by 1 in 7).
6. Cardiff is the preferred area of Wales for 2023 trips. However, whilst this aligns with preferred destination types, it is based on 'next trips' so is likely to be skewed to earlier in the year when city breaks are more prevalent.
7. In line with general preferences, 'trying local food and drink' is the leading activity planned by visitors to Wales from Ireland in 2023, followed by 'learning about local history and culture', 'visiting outdoor visitor attractions' and 'exploring scenic areas by car'.
8. There is strong general interest in festivals/events in Wales amongst Wales 2023 intenders – 'food and drink', 'local produce/arts/crafts', 'non-competitive walking/cycling' and 'country/garden shows' generating the strongest interest.

Key findings (5)

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

1. A range of barriers were cited for members of the Irish holiday market not planning to visit Wales in 2023. 'I am taking an overseas holiday instead' is the leading barrier, a change from 2022 when it was the third most important. Linked to this, only 1 in 10 cite nervousness about COVID as a barrier to visiting in 2023, compared to 1 in 4 for trips in 2022. Together, these findings suggest a less cautious Irish holiday-maker in the next 12 months.
2. Wales' salience as a holiday destination is also a key factor for not visiting – 15% citing 'I don't know about what there is to do there' and 14% 'I've never thought of Wales as a holiday destination'. This perhaps underlines the value of Visit Wales marketing and communications in showcasing Wales as an attractive destination.
3. The cost of living crisis is likely to have a widespread influence on trips in Wales in 2023 with 4 in 5 potential visitors indicating that they will act to manage costs in some way. 'I will look for special offers/deals', 'I will choose cheaper accommodation' and 'I will travel at less expensive times' are the leading ways in which spending is likely to be moderated.

The Appeal of Touring/Trails

1. 4 in 5 of the Irish holiday market would be interested in taking a long distance trail around Wales in the next few years. 'Self-driving route' was the most preferred, followed closely by 'walking/hiking'.
2. A broad range of special interest trails in Wales appeal to the Irish holiday market, with 'heritage sites', 'scenic tours' and 'walking trails' the top three.
3. There is variation in special interest trails appeal by life stage. 'Food, drink foraging', 'nature and wildlife' and 'walking trails' index higher for pre-nesters, with 'heritage sites', 'self-driving routes', 'scenic tours', and 'gardens' of more appeal to older life stages. Families are also interested in 'food, drink and foraging', 'walking trails', 'heritage sites' and 'adventure activities'.
4. 2-3 days is the preferred length of a tourist route or trail in Wales, with 4-7 days also popular.

Key findings (6)

Tourism Marketing Impact

1. Overall, responders to the survey are most likely to state they have heard about the same or a lower level of promotion of Wales as a place to visit in the last few months. These findings are largely unchanged since June 2022.
2. Nearly 3 in 5 (57%) of the Irish holiday market have seen or heard about Wales holidays via at least one information source in the last few months. 'Television advertising' is the leading source, followed closely by 'promotion or content on social media'.
3. Around 3 in 10 (32%) of the Irish holiday market claim to have engaged with one of Visit Wales' digital marketing channels in the last 12 months. 'Visiting the Visit Wales website', 'following/liking the Visit Wales Facebook page', 'following Visit Wales on Instagram' and 'subscribing to the Visit Wales Channel on YouTube' are the leading points of contact.
4. Perceptions of the Visit Wales promotional films shown to the survey responders were positive, with a strong majority agreeing that they 'paint Wales in a very positive light', 'make Wales look very appealing for a holiday or short break' and 'will make people more likely to consider Wales for a holiday or short break'.
5. The promotional films were found to be most positively communicating incredible scenery, lots of activities and things to do and great places to explore off the beaten track. They were less associated with great value for money and high quality accommodation, which are important factors driving holiday choice.

Engagement with the Football World Cup

1. Around 2 in 3 people stated they saw some form of media coverage of Wales during the Football World Cup.
2. Watching a Wales match was the main source of engagement, followed by media coverage of the Wales team or fans at the tournament.
3. 1 in 10 stated they saw a promotional film or other form of advertising for Wales in relation to the tournament.
4. Around half of the respondents who saw some form of coverage of Wales during the World Cup stated it made them more positive about Wales.

Demographics of the Irish Holiday Market



Gender and life stage of the Irish holiday market

- The gender split of the Irish holiday market is evenly split between males and females. Families and older independents are the largest life stages – making up two-thirds between them. Pre-nesters and retirees each make up around 1 in 6.

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

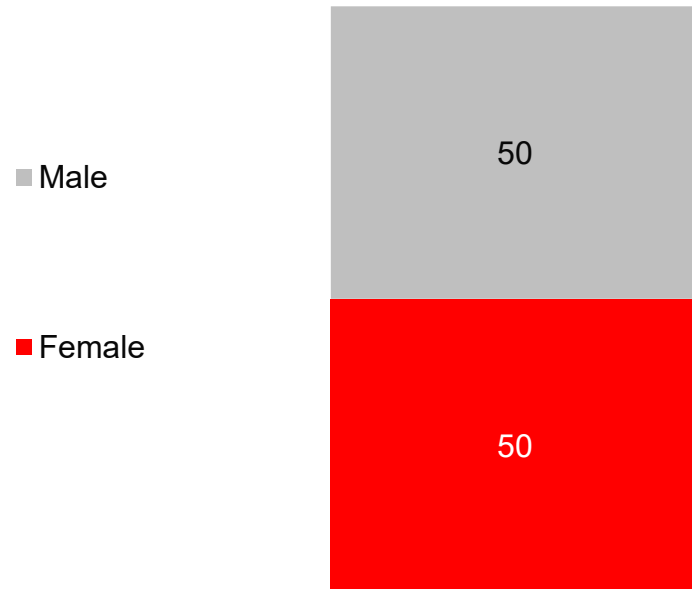
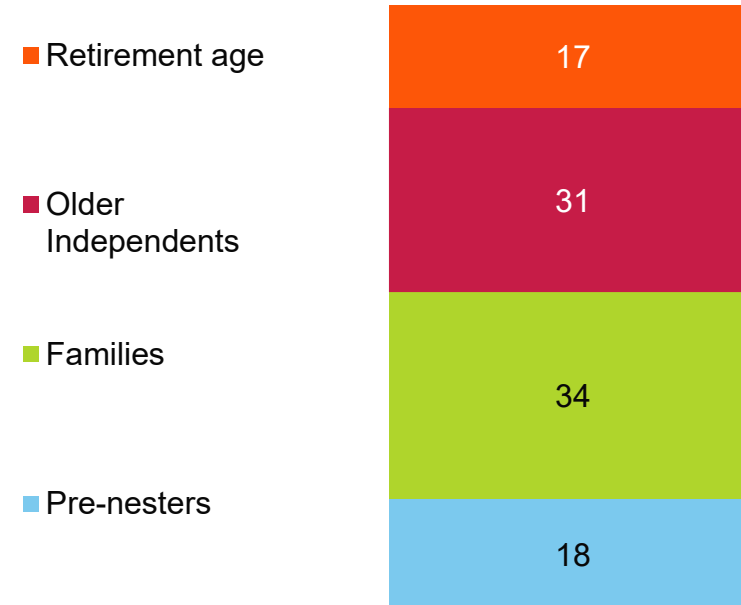


Figure 2. Life stage of respondents, Percentage, All respondents



Employment status and social grade of the Irish holiday market

- Nearly half (49%) of the Irish holiday market is in full-time employment, and around 1 in 6 (17%) are retired.
- 3 in 5 (61%) of the Irish holiday market fall into social grades ABC1.

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

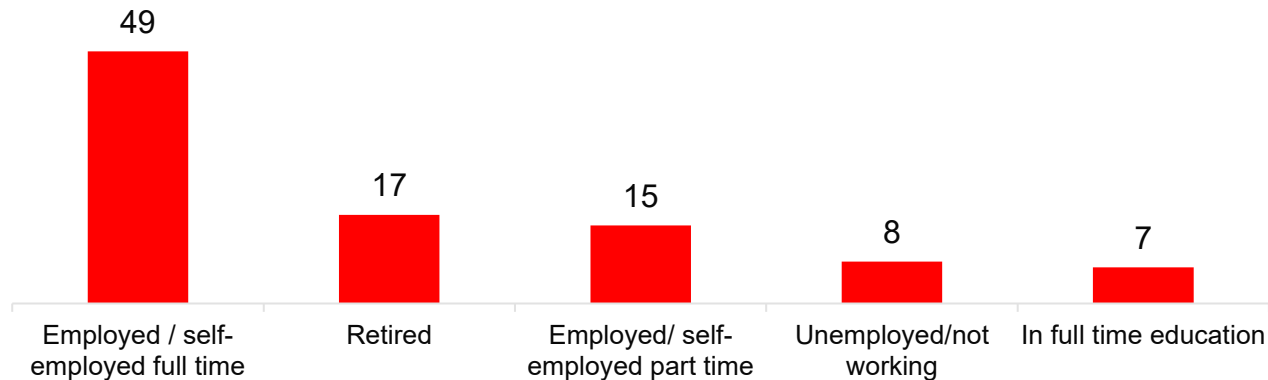
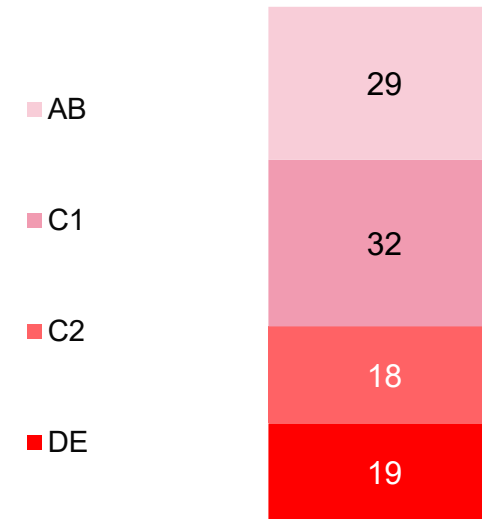


Figure 4. Social grade of respondents (weighted), Percentage, All respondents



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

Base: All respondents n=599

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

- Over two thirds (69%) of the Irish holiday market have either been ‘hit hard’ by the cost of living crisis so far, or ‘are ok but have to be careful’ – the latter making up the largest proportion. Only around a third believe they will not be negatively impacted, within which around 1 in 11 (9%) are better off than before the crisis
- The segment breakdown of the Irish holiday market is broadly similar to pre-pandemic, the only small differences being a slightly higher proportion of ‘Experience seekers’, and slightly fewer ‘Sightseers’.

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

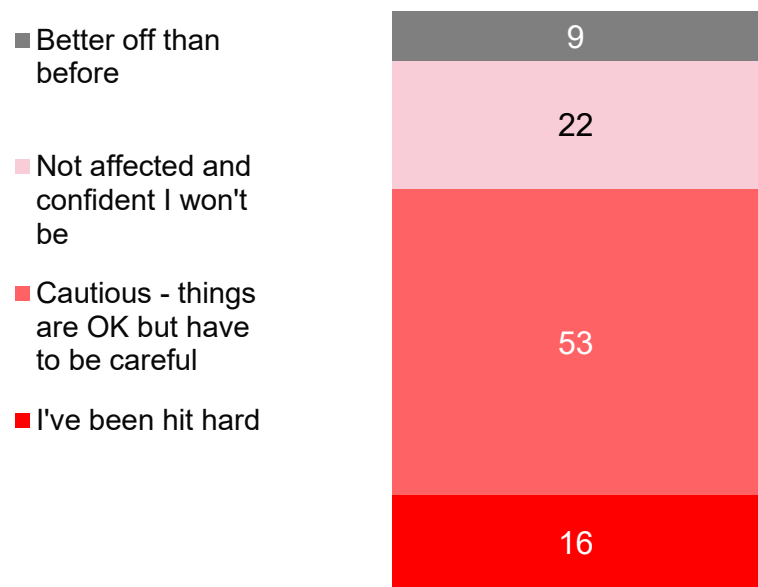
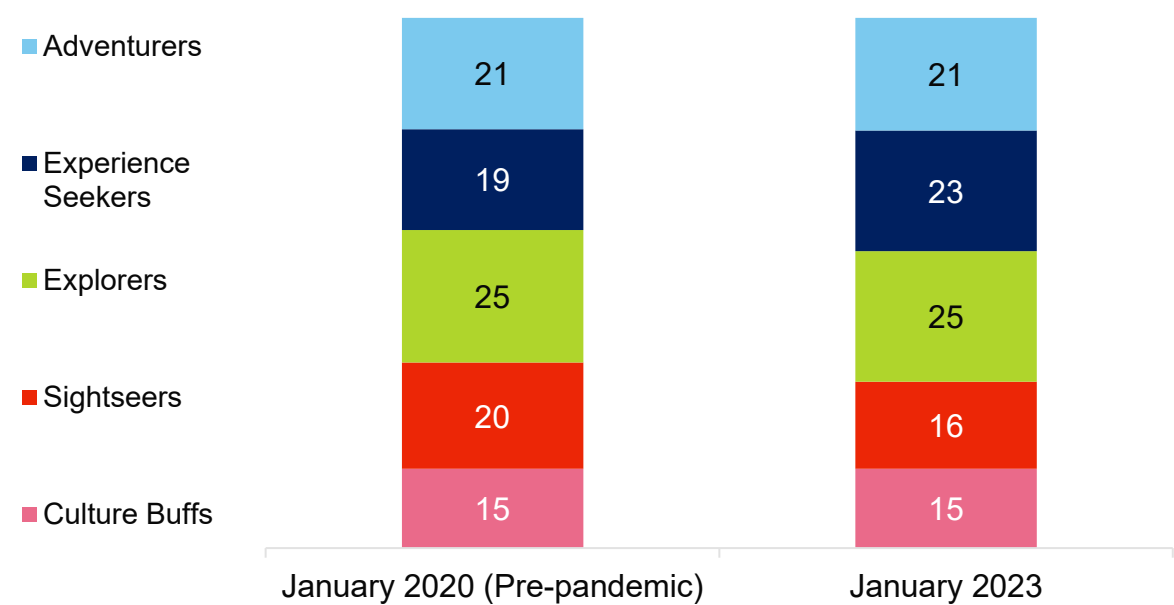


Figure 6. Visit Wales Segment of respondents, Percentage, All respondents



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=599



Region of residence and relationship with Wales

- In terms of region of residence, the Irish holiday market is split along population lines, with around 3 in 10 living in each of Dublin, Leinster (outside of Dublin) and Munster, and nearly 1 in 5 living in Connacht-Ulster.
- 23% have ties to Wales of some sort. 'Having family and friends who live there' is the most dominant with 16% falling into this category.

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

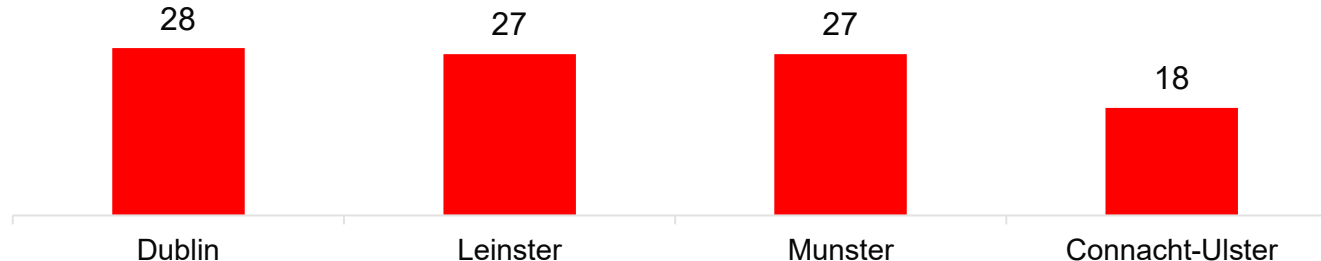
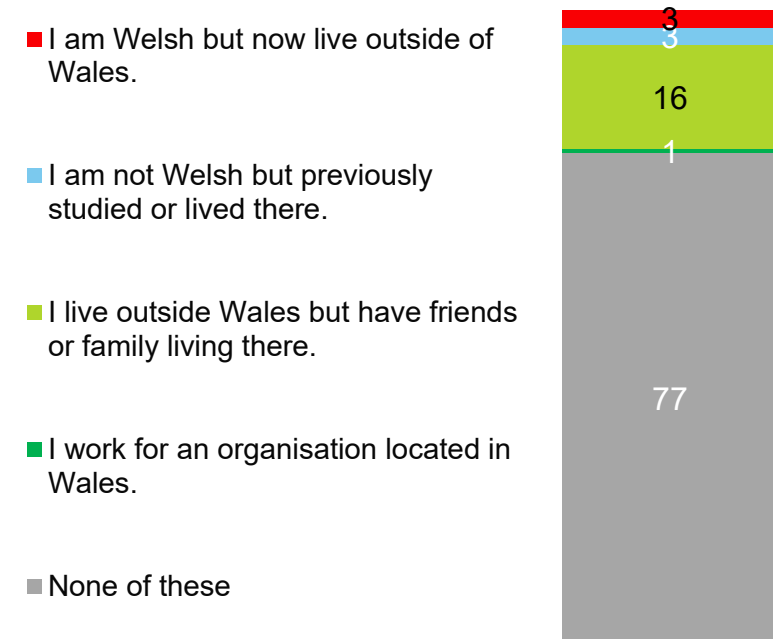


Figure 8. Relationship with Wales, Percentage, All respondents



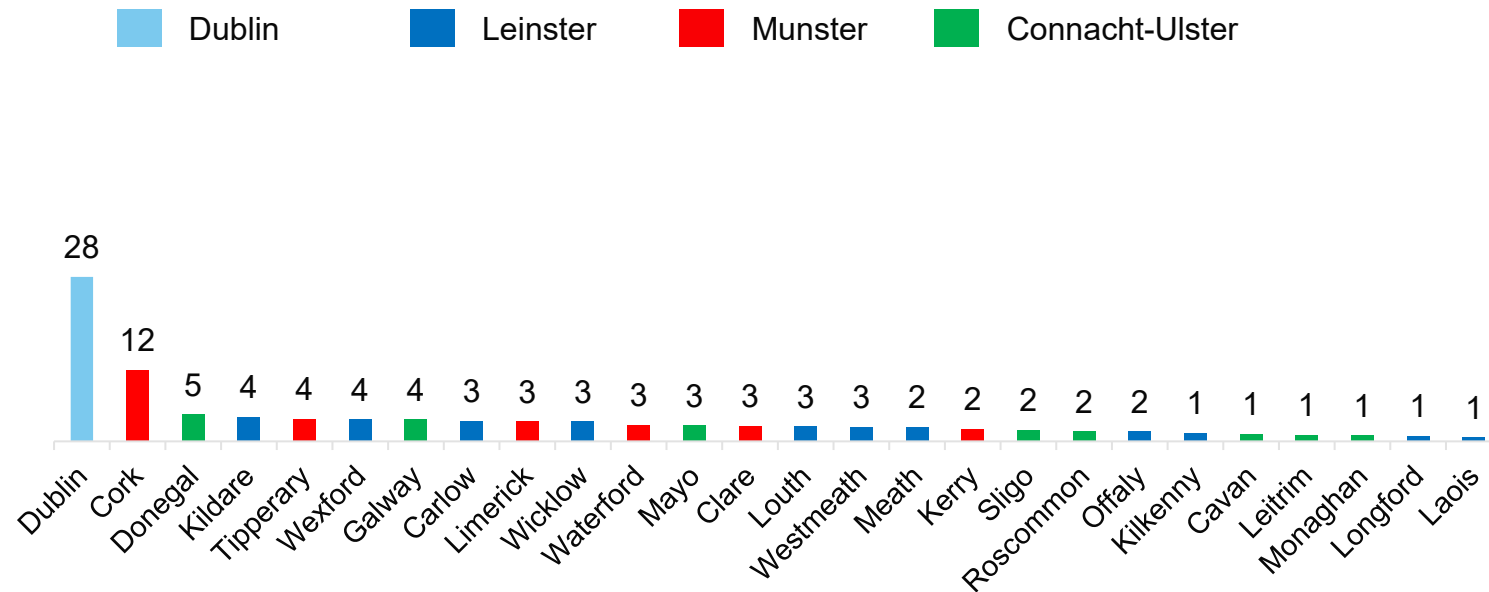
Demographics questions. I-S3. Where in the Republic of Ireland do you live? X9. Which, if any, of the following apply to you?

Base: All respondents n=599

Region of residence – full list

- On a more granular level, Dublin and Cork are the two parts of Ireland with the highest representation – making up 40% between them.

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



Demographics questions. I-S3. Where in the Republic of Ireland do you live?

Base: All respondents n=599

Map sourced from <https://worldmapblank.com/labeled-map-of-ireland/>

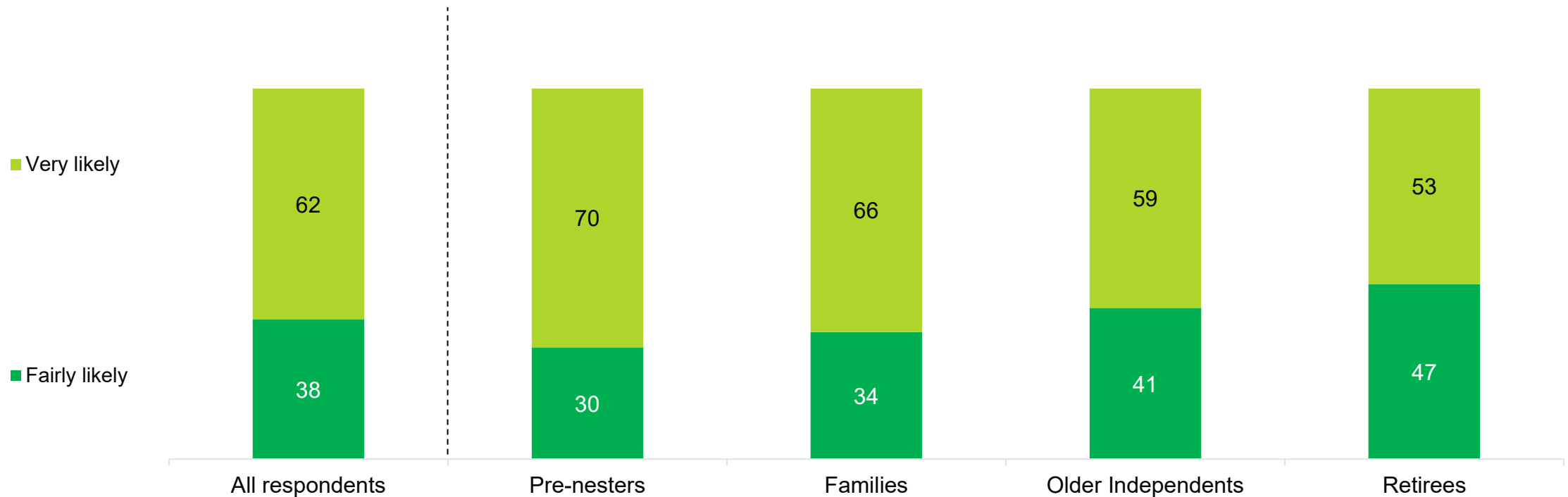
Trip Preferences



UK holiday/short break intention in the next few years

- Just over 3 in 5 (62%) of the Irish holiday market (all of whom qualified for this survey) are 'very likely' to take a UK holiday/short break in the next few years – in line with figures prior to the pandemic.
- Likelihood of taking a UK holiday or short break in the next few years correlates with age. Pre-nesters and families are more likely to say they are 'very likely' take a holiday or short break in the UK in the next few years than older independents or retirees.

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



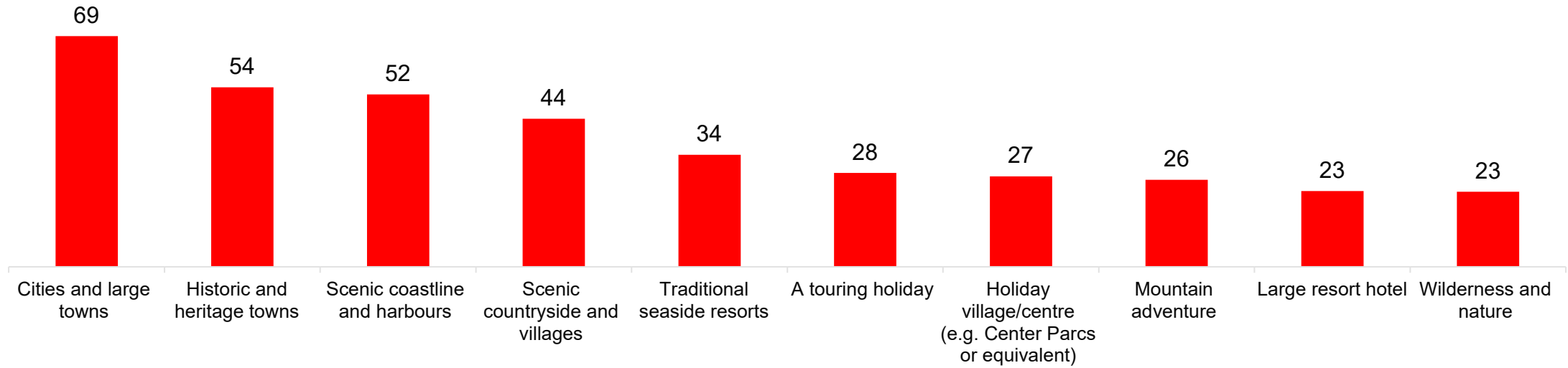
IRE-S7. How likely or unlikely are you to take a holiday or short break in the UK in the next few years?

Base: All respondents n=599; Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74

Destination types seriously considering a UK overnight trip

- Consistent with previous research on the Irish holiday market, 'cities and large towns' are the most popular type of holiday/short break destination in the UK – nearly 7 in 10 (69%) reported seriously considering one in the next few years. 'Historic and heritage towns', 'scenic coastlines and harbours' and 'scenic countryside and villages' are the next most popular destination types.
- Other destination types are also of interest, albeit to a smaller proportion of people. 'Large resort hotels' and 'wilderness and nature' were the least popular destination types, each indexing 23%.

Figure 11. Destination types seriously considering a UK holiday/short break in next 12 months, Percentage, All respondents



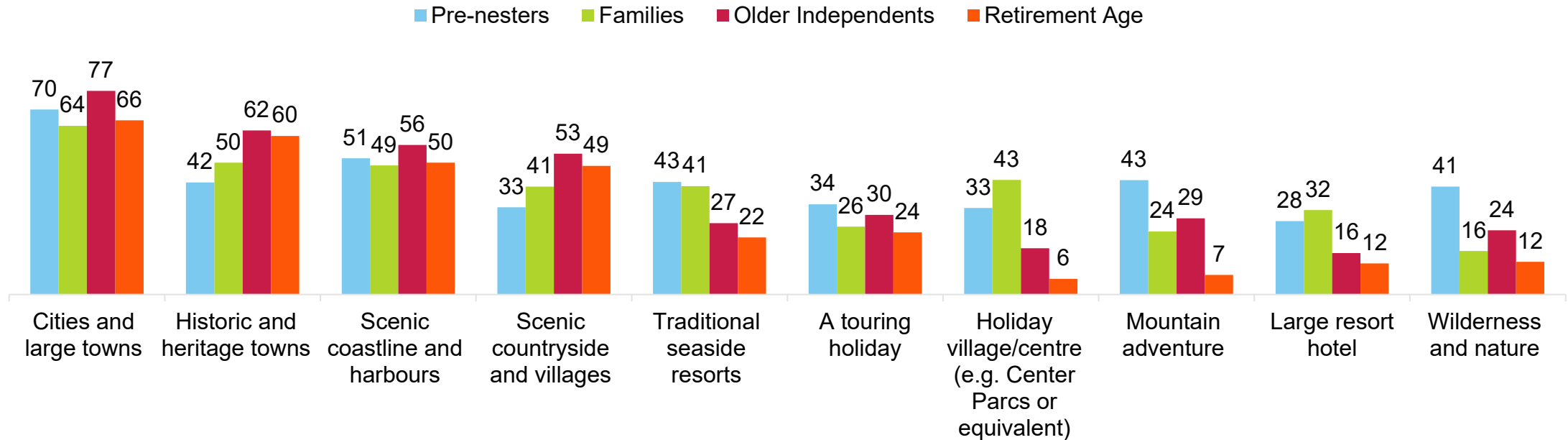
B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next 12 months?

Base: All respondents n=599

Destination types seriously considering – by life stage

- ‘Cities and large towns’ is the leading destination type for all life stages. Beyond this leading preference there is some variation. ‘Older’ life stages such as older independents and retirees are more likely than other life stages to consider ‘historic and heritage towns’ and ‘scenic countryside and villages’. Pre-nesters have a higher preference for ‘mountain adventure’ and ‘wilderness and nature’ than other life stages. Alongside pre-nesters, families index higher for ‘holiday village/centres’, ‘large resort hotels’ and ‘traditional seaside resorts’.

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



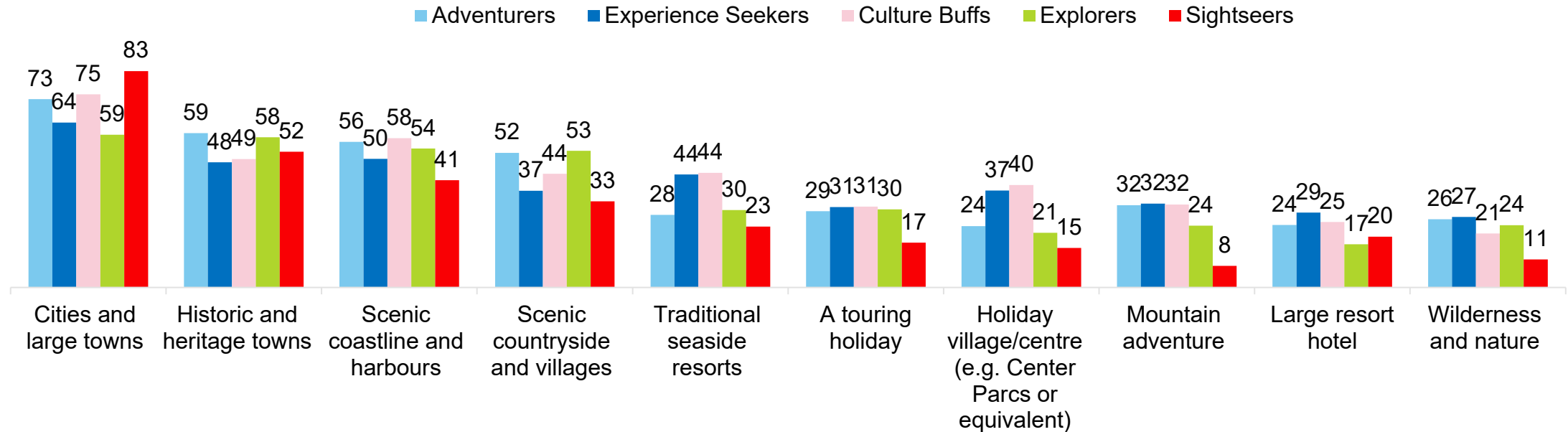
B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next 12 months?

Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74

Destination types seriously considering – by segment

- ‘Cities and large towns’ is also the leading UK destination type considered by each audience segment, although there is some variation among segments. Sightseers are the segment most likely to consider a ‘city or large town’ but index lower than the other segments for all other destination types, other than ‘historic and heritage towns’ and ‘large resort hotels’. Adventurers are the segment most likely to consider ‘historic and heritage towns’, and have high consideration for ‘cities and large towns’, ‘scenic coastline and harbours’ and ‘scenic countryside and villages’. Experience seekers and Culture Buffs also show strong consideration for these destination types, and index above other segments for ‘traditional seaside resorts’ and ‘holiday villages/centres’. Explorers – the largest segment at 25% of the Irish market – show almost equal preference for ‘cities and large towns’, ‘historic and heritage towns’, ‘scenic coastline and harbours’ and ‘scenic countryside and villages’. Explorers – the largest segment at 25% of the Irish market – show almost equal preference for ‘cities and large towns’, ‘historic and heritage towns’, ‘scenic coastline and harbours’ and ‘scenic countryside and villages’.

Figure 13. Destination types seriously considering a UK holiday/short break in next 12 months, Percentage, All respondents



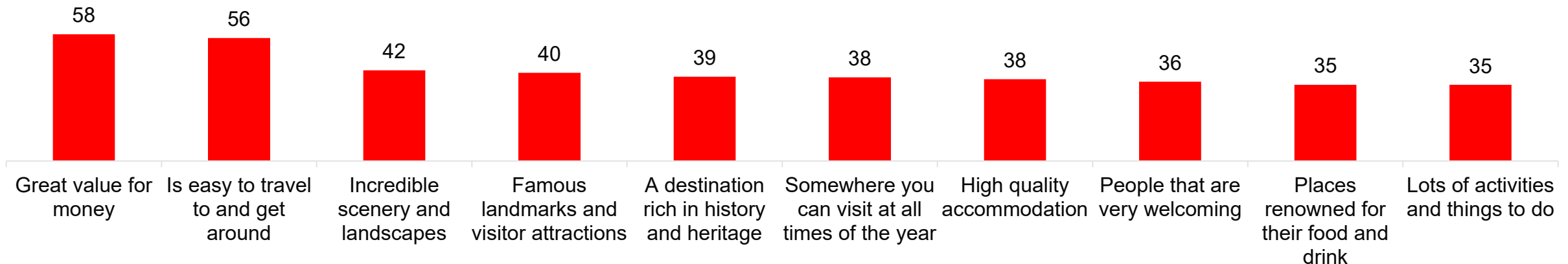
B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next 12 months?

Base: Adventurers n=136; Experience seekers n=122; Explorers n=150; Sightseers n=102; Cultural Buffs n=89

Destination influences for a UK overnight trip

- 'Great value for money' is the leading destination influence for a UK holiday/short break, followed by 'is easy to travel to and get around'. Beyond these practical factors, 'incredible scenery and landscapes', 'famous landmarks and visitor attractions', and 'a destination rich in history and heritage' are the next most important influences. A range of other influences are also important.
- Notably, 'value for money' is more of an influence than when the same question was asked in January 2020 and is of greater importance amongst those from lower social grades (67% of DEs compared to 53% of ABs) and those who have been negatively impacted by the cost-of-living crisis (64% of those who report being hit hard or being cautious, compared to 46% of those who report being better off or confident they won't be affected).

Figure 14. Destination influences for a UK holiday/short break, Percentage, Top 10, All respondents



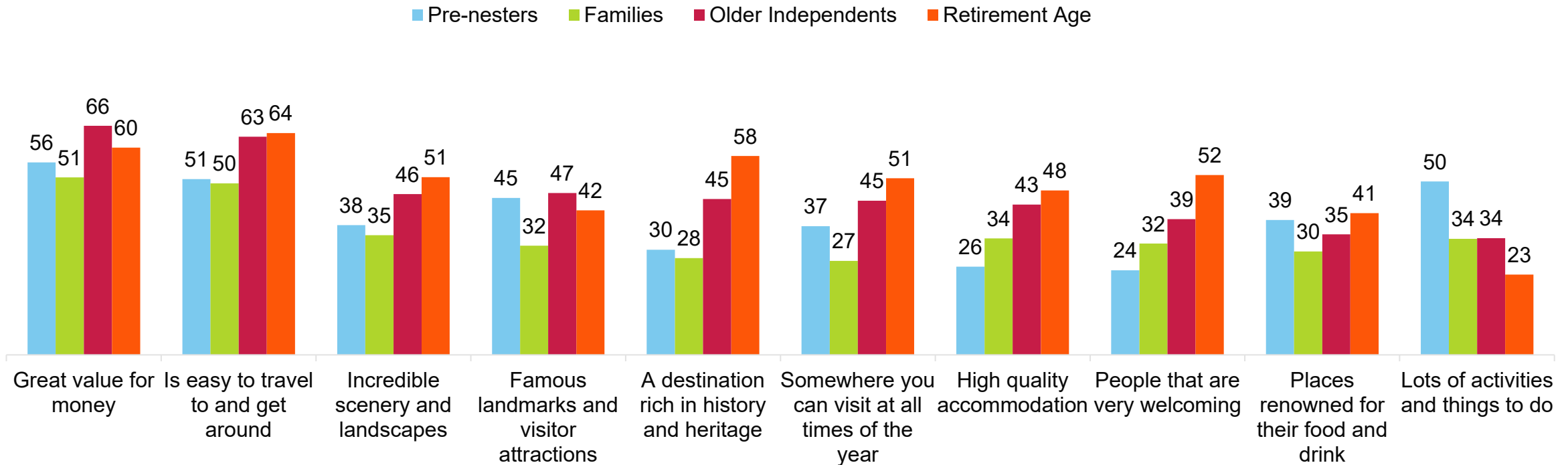
B2. Below are a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: All respondents n=599

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 vary. Older life stages such as retirees and older independents are more likely to cite influences relating to ease of travel to and getting around, somewhere that they can visit at all times of the year, history and heritage, scenery and landscapes, and people that are welcoming. Pre-nesters are more likely to value ‘lots of activities and things to do’ than other life stages.

Figure 15. Destination influences for a UK holiday/short break by life stage, Percentage, Top 10, All respondents



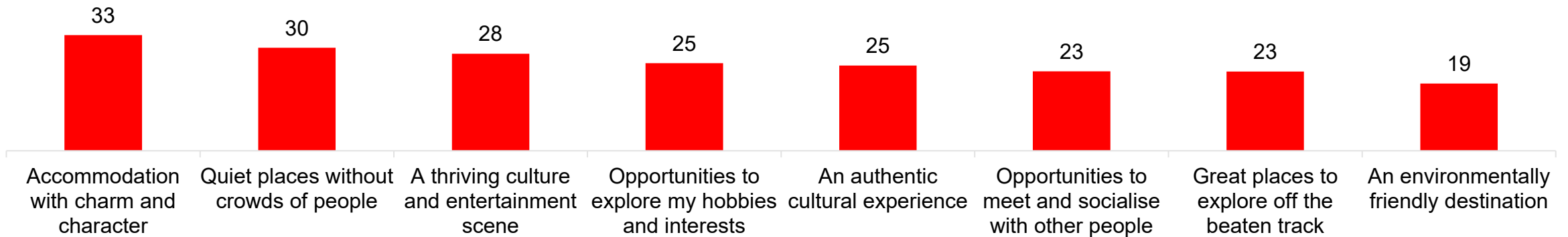
B2. Below are a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74

Destination influences for a UK overnight trip

- A range of other destination influences are important to a more limited audience. Overall, 'an environmentally friendly destination', 'great places to explore off the beaten track' and 'opportunities to meet and socialise with other people' are the least influential.

Figure 16. Destination influences for a UK holiday/short break, Percentage, Bottom 8, All respondents



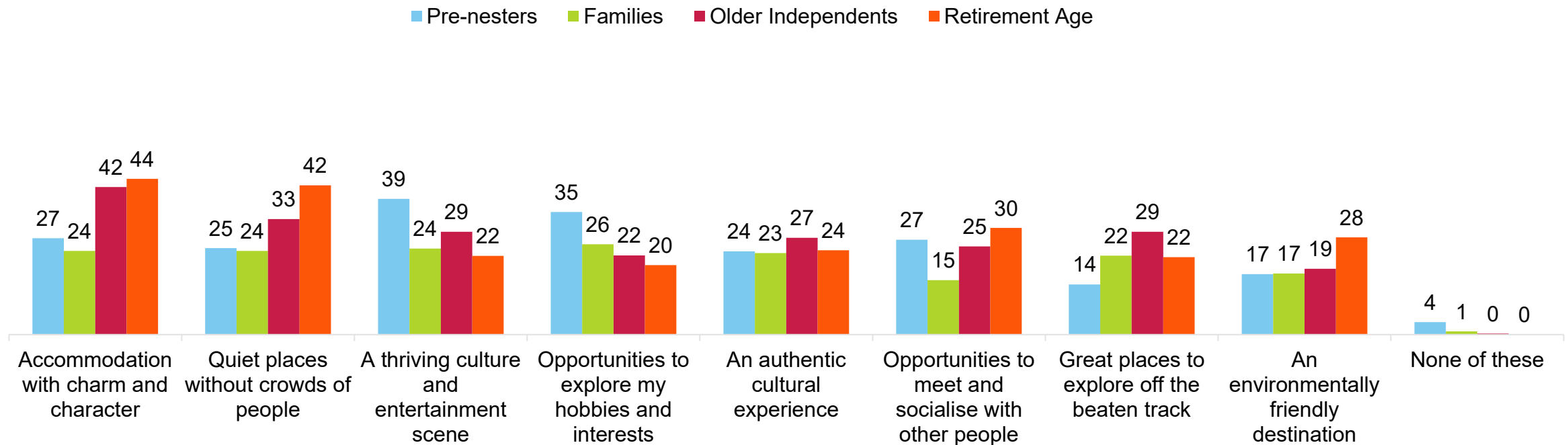
B2. Below are a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: All respondents n=599

Destination influences for a UK overnight trip – by life stage

- There are a number of other areas where life stage preferences differ. Consistent with their desire for 'high quality accommodation', older independents and retirees are more likely to be influenced by 'accommodation with charm and character'. They also have a stronger preference for 'quiet places without crowds of people'. Conversely, pre-nesters stand out in showing a preference for 'a thriving culture and entertainment scene' and 'opportunities to explore my hobbies and interests'. 'An environmentally friendly destination' is a relatively low priority across life stages.

Figure 17. Destination influences for a UK holiday/short break by life stage, Percentage, Bottom 8, All respondents



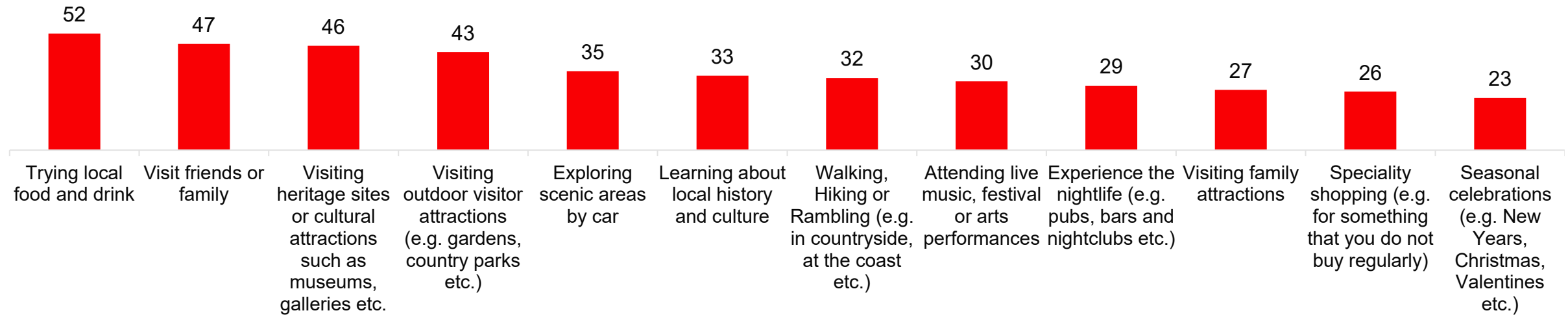
B2. Below are a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK?

Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74

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

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

Figure 18. Experiences would most like to do on a UK holiday/short break, Percentage, Top 12, All respondents



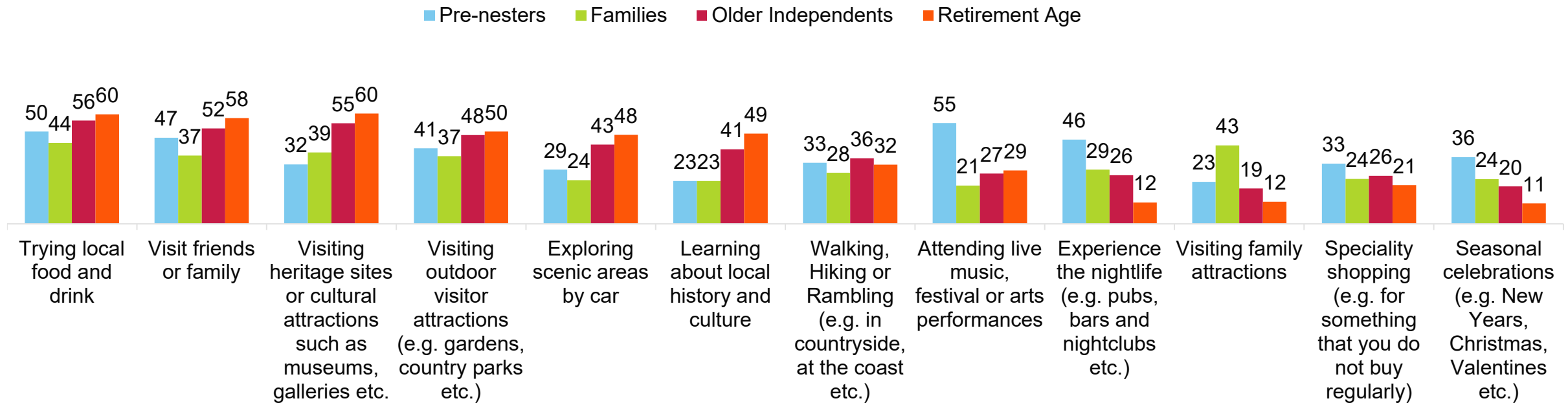
B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next 12 months?

Base: All respondents n=599

Experiences would most like to do – by life stage

- There are some differences in the leading preferred experiences by life stage. Overall preference for 'trying local food and drink' is relatively consistent across life stage albeit with a slight skew towards older independents and retirees. Differences in preference for other experiences is more clear-cut. Consistent with their leading destination influences, older independents and retirees are more likely to favour experiences relating to history and heritage, and scenic areas. Pre-nesters' preference for 'thriving entertainment scenes' is underlined with their relatively strong desire to 'attend live music performances' and 'experience the nightlife'. Unsurprisingly, families are the most likely to be interested in 'visiting family attractions'.

Figure 19. Experiences would most like to do on a UK holiday/short break by life stage, Percentage, Top 12, All respondents



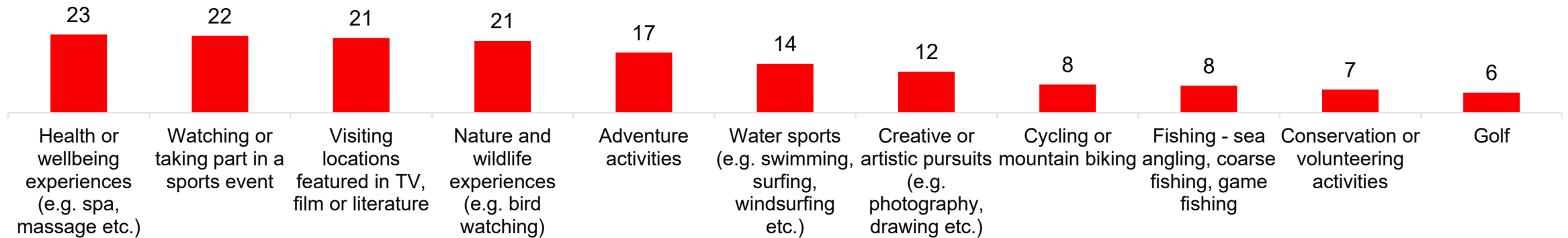
B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next 12 months?

Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74

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

- A range of other activities appeal to a more niche audience. For example, 'health or wellbeing experiences', 'watching or taking part in a sports event', 'visiting locations featured in TV, film or literature' and 'nature and wildlife experiences' are of interest to around 1 in 5.
- 'Conservation or volunteering activities' and 'golf' were the least popular experiences.

Figure 20. Experiences would most like to do on a UK holiday/short break, Percentage, Bottom 11, All respondents



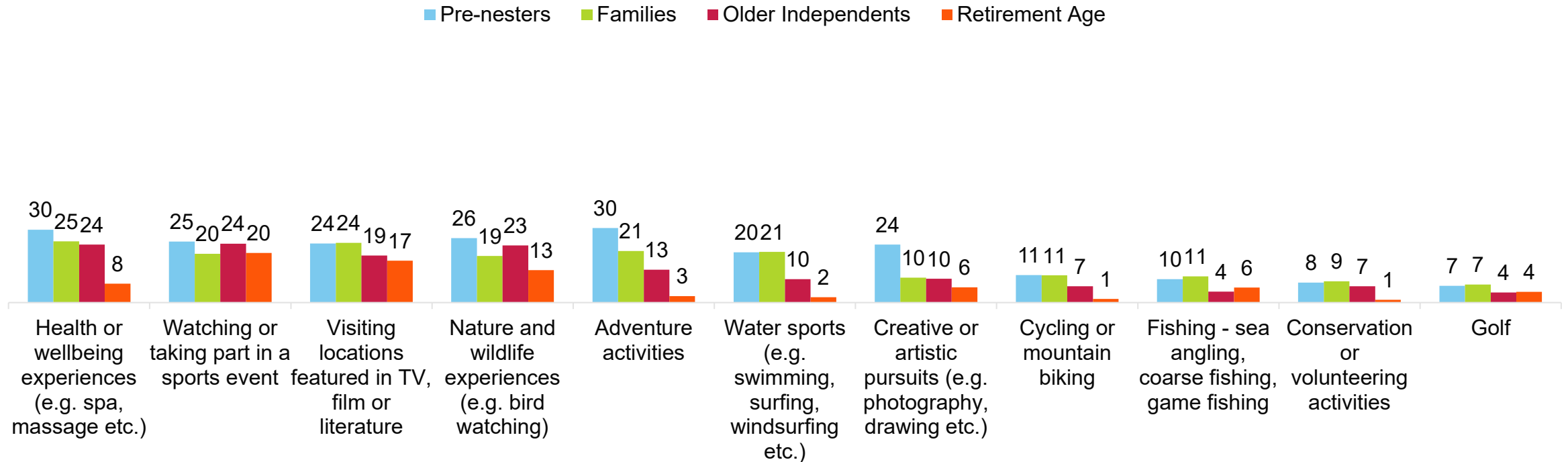
B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK and Ireland in the next 12 months?

Base: All respondents n=599

Experiences would most like to do – by life stage

- Amongst the more niche activities, pre-nesters and families index relatively highly on active experiences such as ‘adventure activities’, ‘water sports’, ‘cycling or mountain biking’ and ‘fishing’.
- Retirees are less likely to be interested in ‘health or wellbeing experiences’ than the other life stages. Pre-nesters are more likely to be interested in ‘creative or artistic pursuits’ than other life stages.

Figure 21. Experiences would most like to do on a UK holiday/short break by life stage, Percentage, Bottom 11, All respondents



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

Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74

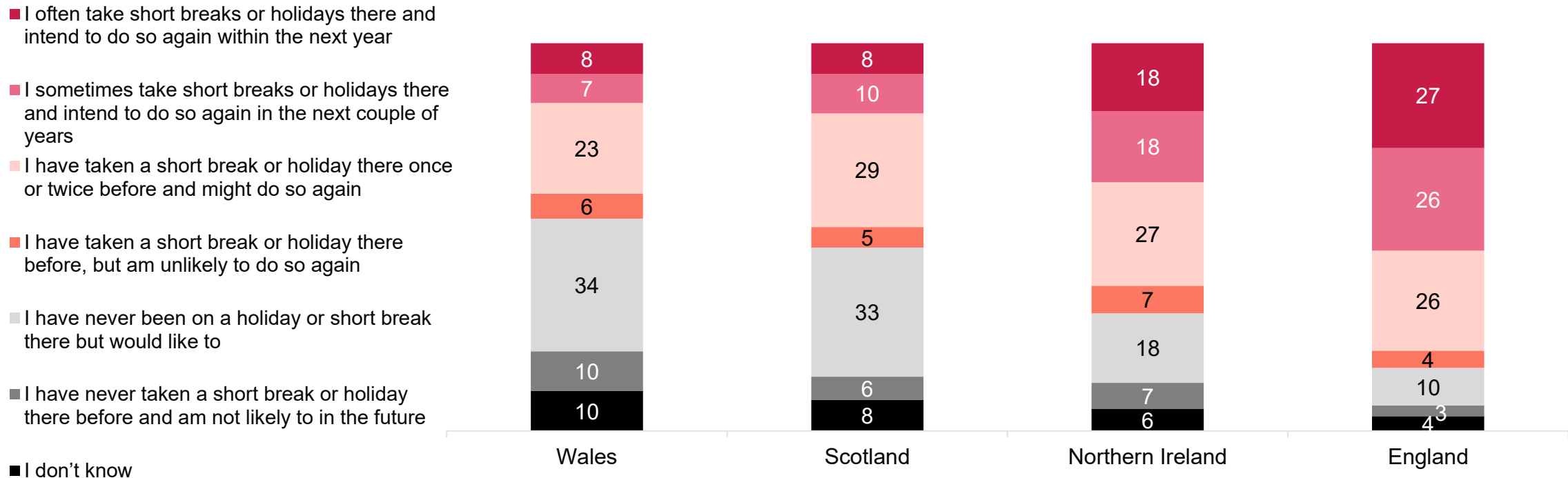
Destination Relationships and Previous Visits



Loyalty to Wales and other destinations

- England is the part of the UK most likely to generate regular holidays or short breaks, more than half of the Irish holiday market often/sometimes going there. Wales attracts the lowest proportion of regular visitors, followed closely by Scotland.
- Positively, 34% of the Irish holiday market have never been to Wales for a holiday/short break but would like to – higher than any other nation.

Figure 22. Relationship with each destination, Percentage, All respondents



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

Base: All respondents n=599

Loyalty to Wales by region of residence

- Dublin residents and residents from the wider Leinster area report the strongest relationship with Wales as a holiday or short break destination – around 1 in 6 take holidays/short breaks there often or sometimes and intending to do so within the next year or couple of years. A large proportion of residents from each Irish region have never taken a holiday or short break to Wales, with most of these stating they would like to in the future.

Figure 23. Relationship with Wales by region of residence, Percentage, All respondents

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



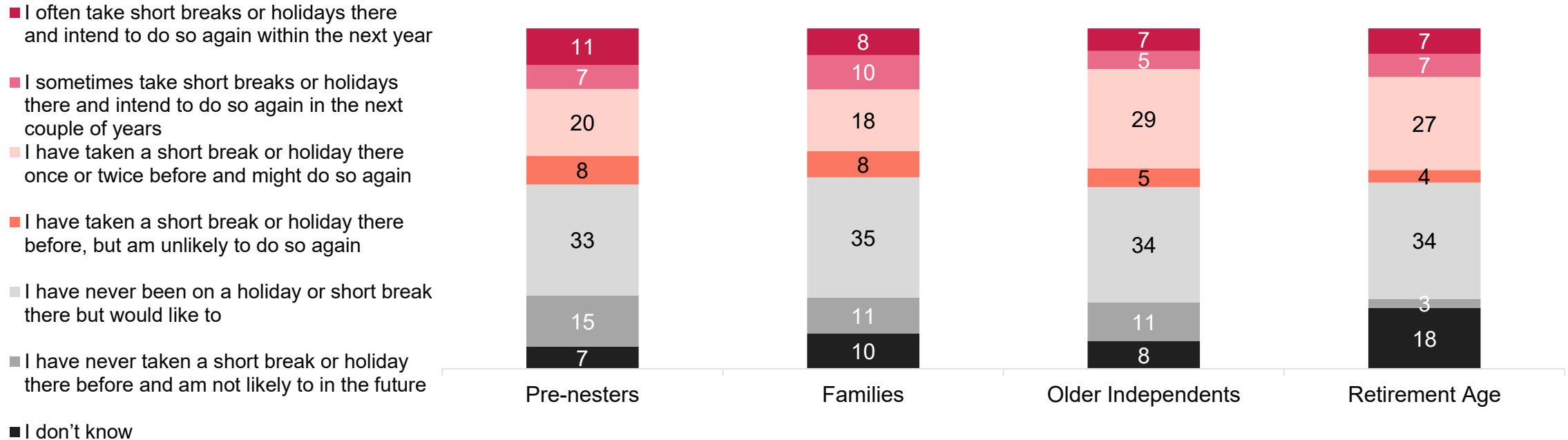
IRE-C1. Which of the following statements best applies to you when it comes to visiting these destinations?

Base: All respondents. Dublin n=149; Leinster n=177; Munster n=169; Connacht-Ulster n=104

Loyalty to Wales by life stage

- Pre-nesters and families are the most likely to report 'often' or sometimes' taking short breaks or holidays to Wales – 18% of each of these life stages report doing so and intending to do so again at least in the next couple of years. Older independents and retirees are the least likely to visit Wales 'often' or 'sometimes', but the most likely to state they 'have visited once or twice before and might do so again.'
- Around a third of each life stage has never been to Wales and would like to, suggesting strong potential to convert to visits.

Figure 24. Relationship with Wales by life stage, Percentage, All respondents



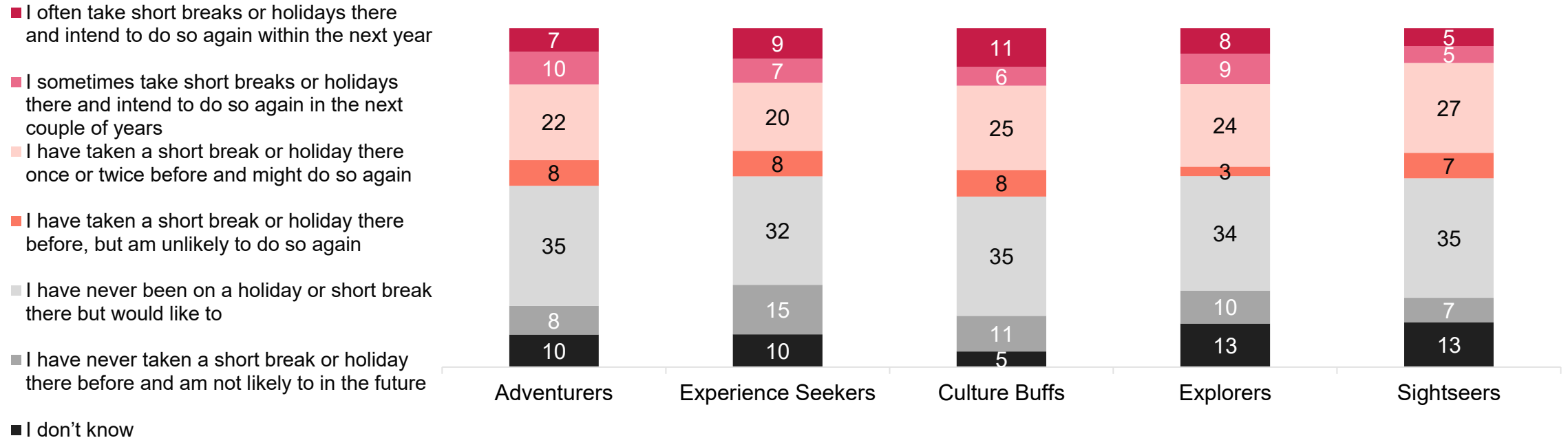
IRE-C1. Which of the following statements best applies to you when it comes to visiting these destinations?

Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74

Loyalty to Wales by segment

- There are limited differences in relationship with Wales by segment, around 1 in 6 of each – with the exception of sightseers – stating they often or sometimes take holidays or short breaks there and intend to do so in the next year or next couple of years.
- Around one third of all life stages have never taken a short break or holiday to Wales before, but would like to do so, indicating similar potential to convert to visits across the different segments.

Figure 25. Relationship with Wales by segment, Percentage, All respondents



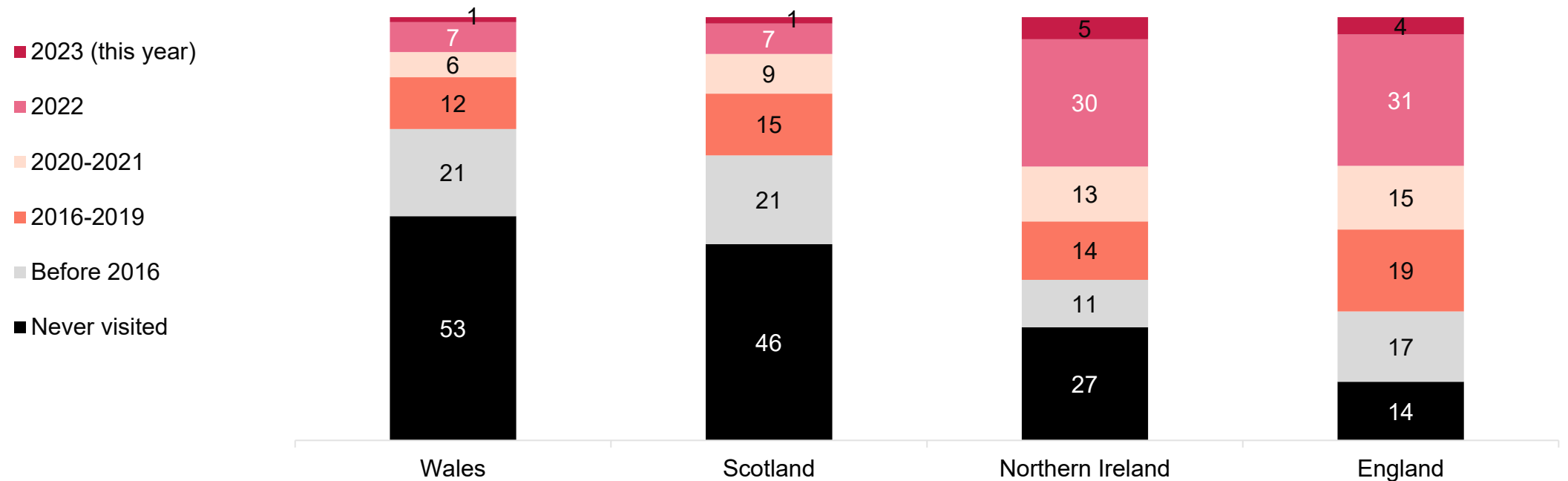
IRE-C1. Which of the following statements best applies to you when it comes to visiting these destinations?

Base: Adventurers n=136; Experience seekers n=122; Explorers n=150; Sightseers n=102; Cultural Buffs n=89

Previous visits to each destination

- Northern Ireland and England were the most visited overnight destinations in 2022, 30% and 31% of the Irish holiday market having visited them respectively.
- 7% stated they had visited Wales for an overnight short break or holiday in 2022, the same proportion as to Scotland.

Figure 26. Previous visits to each destination, Percentage, All respondents



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

Base: All respondents n=599

Previous visits to Wales by region of residence

- Aligned with their stronger relationship with Wales, Dublin residents are most likely to have last visited Wales for a holiday/short break in 2022 (12%).
- Nearly 1 in 4 Munster residents and Leinster residents last visited Wales for a holiday/short break before 2016. Connacht-Ulster residents are the most likely to have never visited Wales, compared to the other residential groups.

Figure 27. Previous visits to WALES by region of residence, Percentage, All respondents



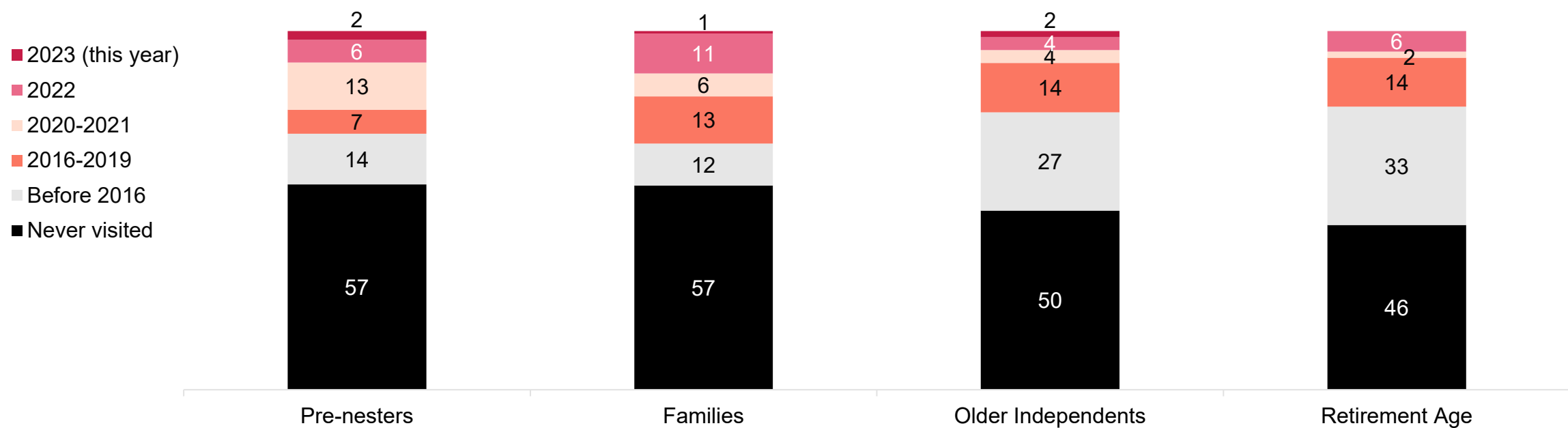
C2. When did you last visit these places for a holiday or short break?

Base: All respondents. Dublin n=81; Leinster n=103; Munster n=91; Connacht-Ulster n=52

Previous visits to Wales by life stage

- Aligned with general loyalty to Wales as a destination, pre-nesters and families are the life stages most likely to have taken a trip in Wales since 2020 – families are the most likely to have done so in 2022. Retirees and older independents show a lower level of recent visitation since 2020 but higher levels of visitation during 2019 and earlier than the other life stages. This does suggest there may be a need to ‘reactivate’ these older life stages.

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

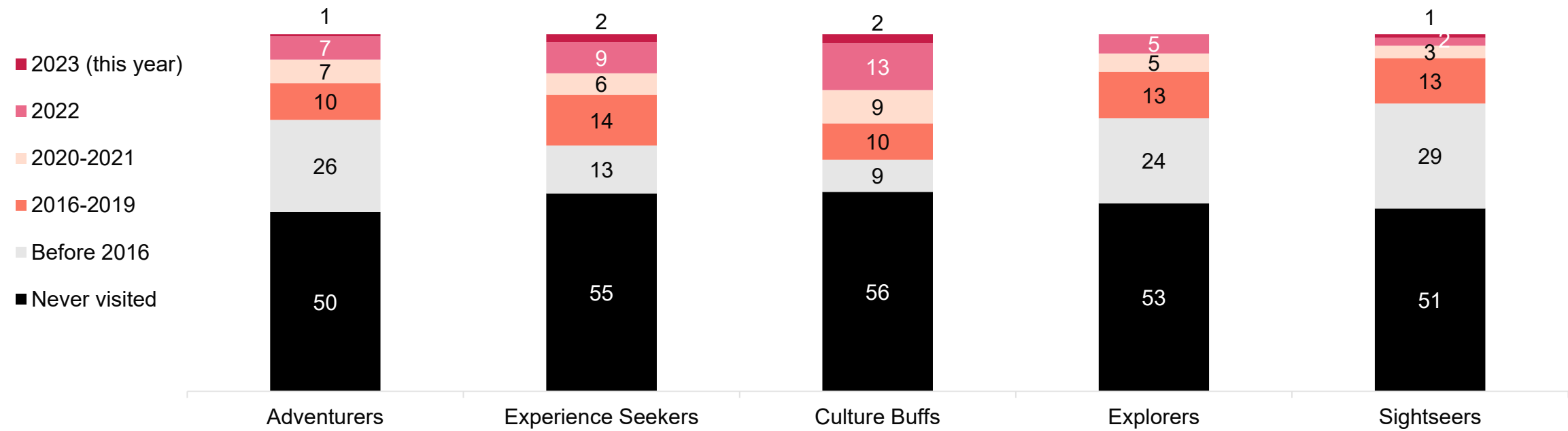


C2. When did you last visit these places for a holiday or short break?
Base: Pre-nesters n=43; Families n=114; Older Independents n=123; Retirees n=47

Previous visits to Wales by segment

- By segment, Cultural Buffs’ are the most likely to have visited Wales for a holiday or short break in the recent past – 13% stating they last visited in 2022 and a further 19% stating they last visited between 2016 and 2021.
- Adventurers and Experience seekers are the next most likely to have visited Wales in recent years. 7% of Adventurers and 9% of Experience seekers visited in 2022, and 17% of Adventurers and 20% of Experience seekers visited between 2016 and 2021. Explorers and Sightseers are the segments least likely to have visited Wales since 2016.

Figure 29. Previous visits to WALES by SEGMENT, Percentage, All respondents



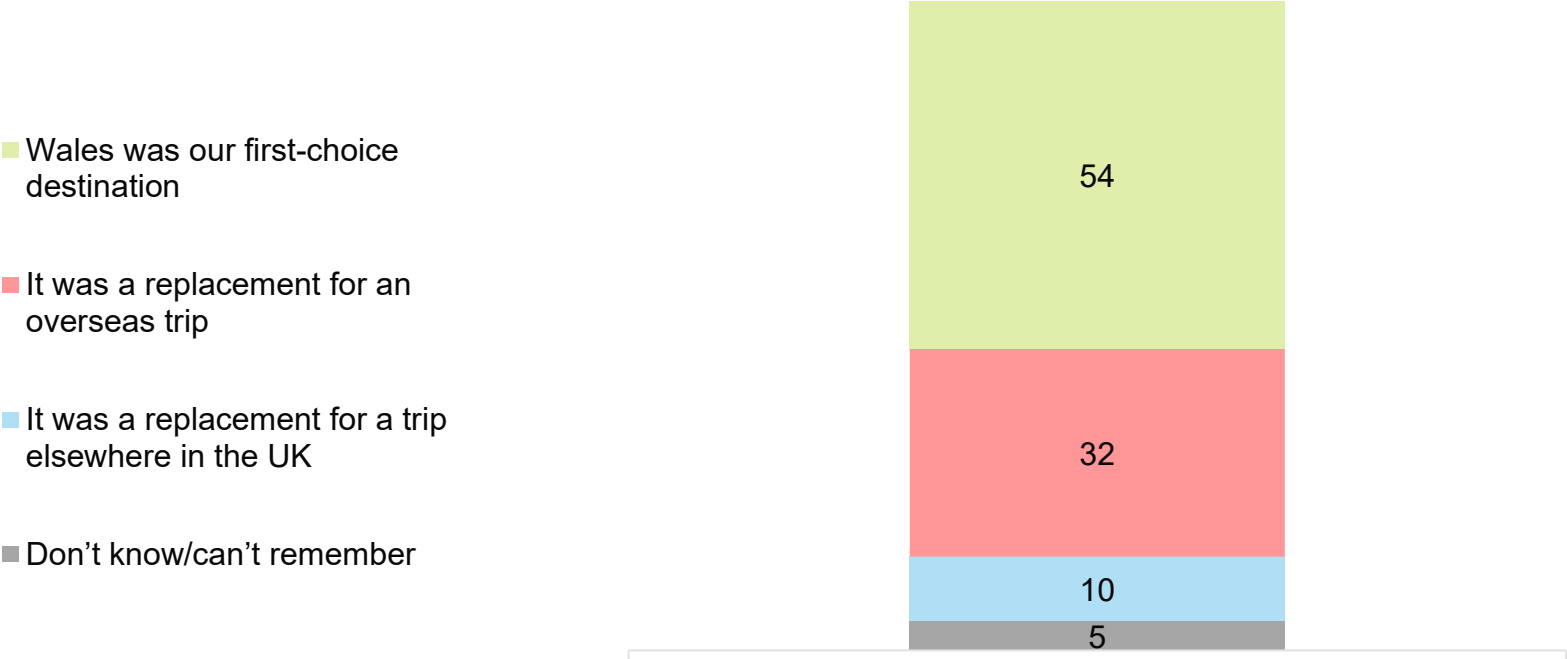
Wales Visitation in 2022



Wales as a first choice destination in 2022

- Over half of the Irish market that took a holiday or short break to Wales in 2022 stated that ‘Wales was our first choice destination’, while 32% stated that Wales ‘was a replacement for an overseas trip’. 1 in 10 described it as a replacement for a trip elsewhere in the UK.

Figure 30. Wales as a first-choice destination, Percentage, All 2022 Wales trip takers



D4. Which, if any, of these statements best apply to your trip in Wales in <INSERT MONTH>?
Base: All 2022 Wales trip takers n=96.

Month of trip and length of trip in Wales in 2022

- Overnight visits to Wales from the Irish market were at their highest in the peak summer months – almost half (49%) visiting between June and August, the highest proportion in July (at 26%). Visits to Wales dropped between November and April, with the exception of a slight rise in February (indicatively* driven by families and coinciding with half-term).
- The majority (68%) of overnight trips to Wales in 2022 were short breaks of 1-3 nights – around a third took a longer break of 4+ nights.

Figure 31. Months taken a trip to Wales in 2022, Percentage, All 2022 Wales trip takers

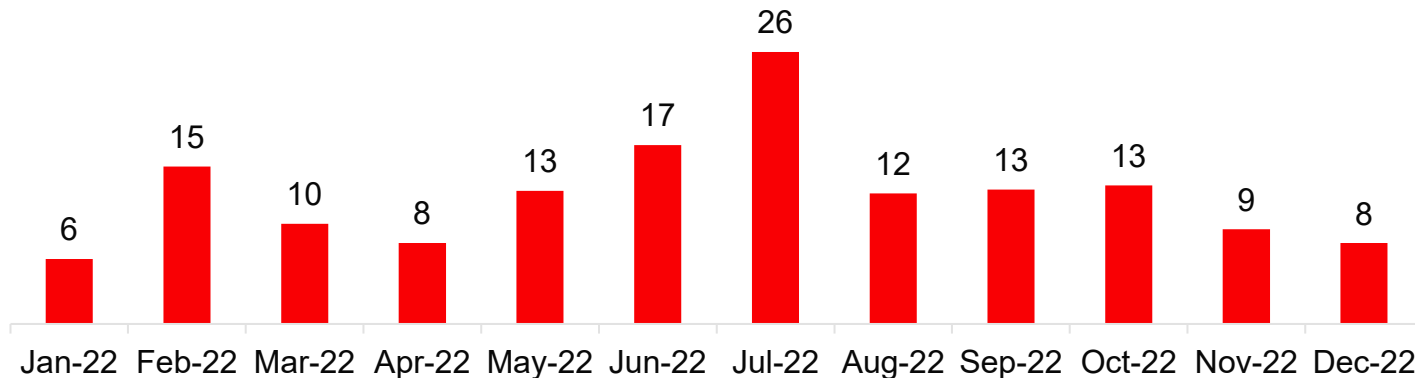
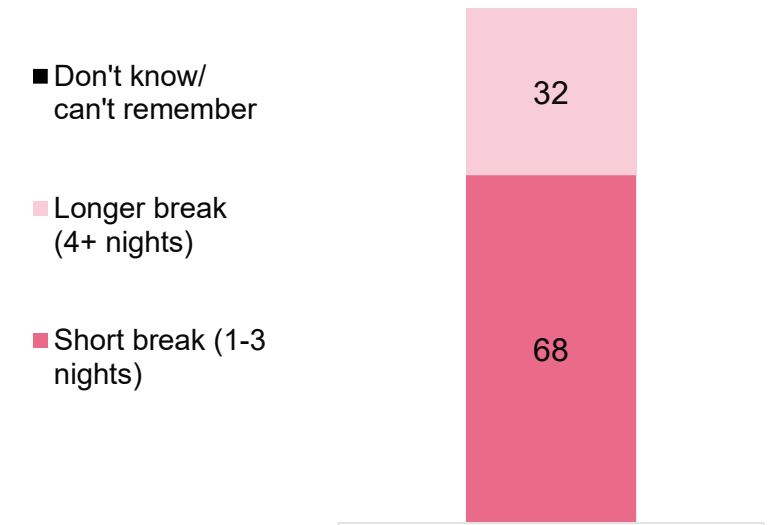


Figure 32. Number of nights stayed in a Wales trip in 2022, Percentage, All 2022 Wales trip takers



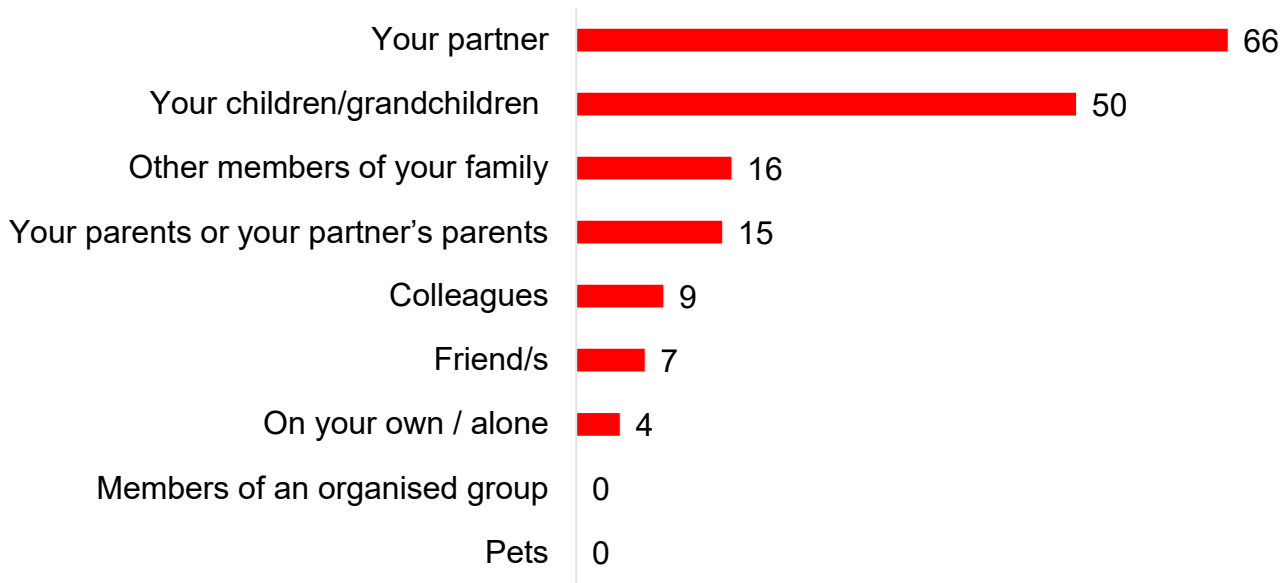
D3. And in which months of the year did you visit Wales for a short-break or holiday in 2022?
D10. Was this trip in Wales in <INSERT MONTH> a short break (1-3 nights) or a longer break (4+ nights)?
Base: All 2022 Wales trip takers n=96

*Where results are described as 'indicative', this is due to low base sizes. Treat with caution.

Wales party composition

- Overnight visitors to Wales were most likely to have visited with their partner (66%), followed by ‘children/grandchildren’ (50%). Around 1 in 6 took their trip with ‘other members of their family’ (16%) or their ‘parents or partner’s parents’ (15%). ‘Friends’ accompanied a minority of Wales overnight visitors, with no visitors reporting travelling with pets or in an organised group, and only 4% reporting travelling alone.

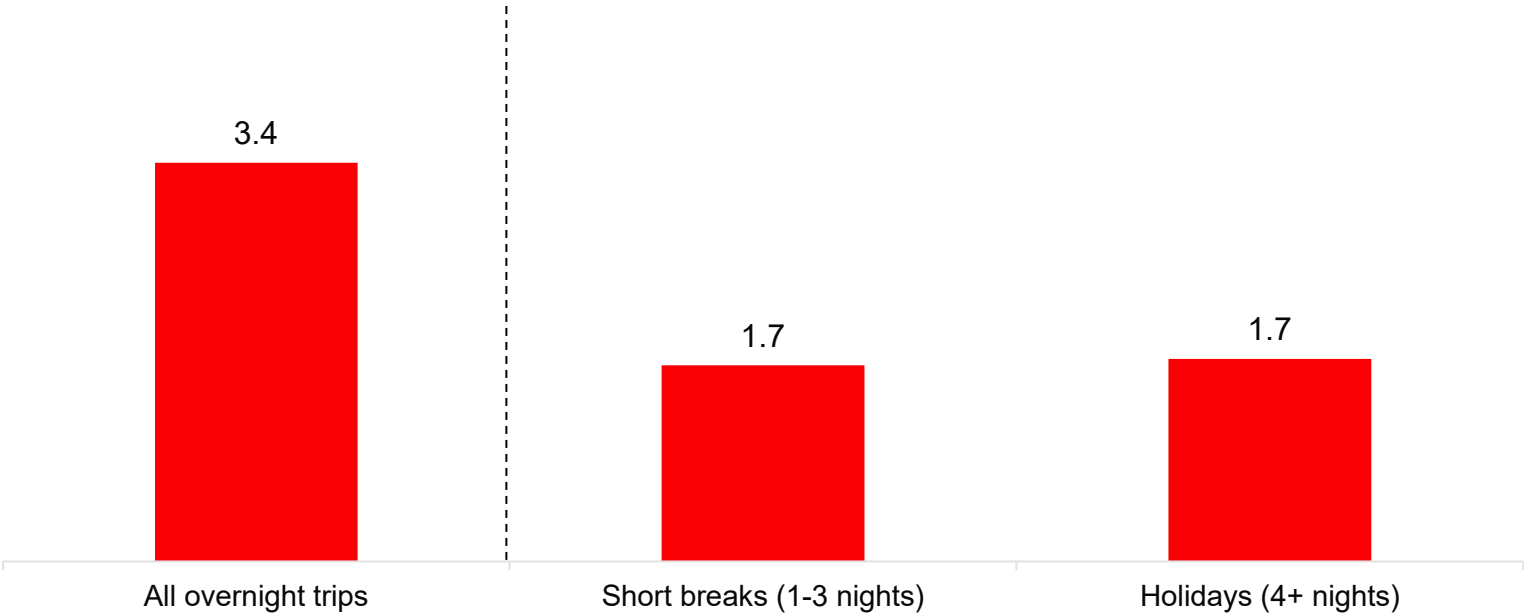
Figure 33. Visitor party make-up for Wales trip in 2022, Percentage, All 2022 Wales trip takers



Number of trips and month of trips in Wales in 2022

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

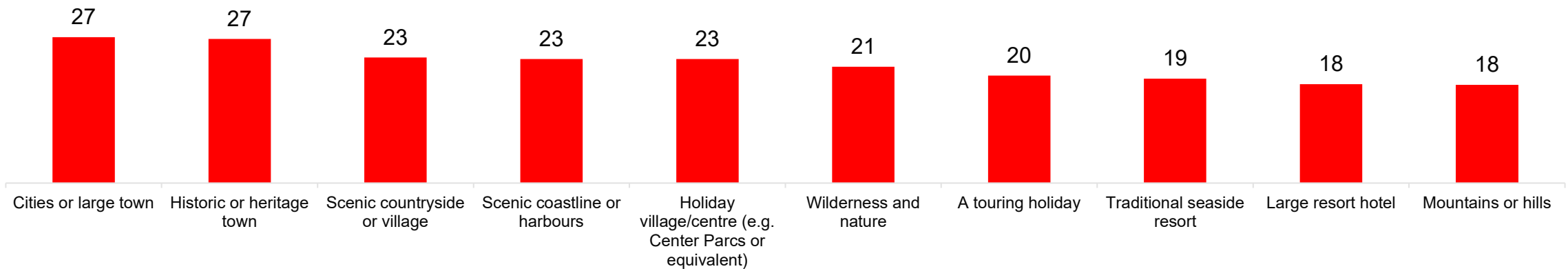
Figure 34. Average number of Wales trips taken in 2022, All 2022 Wales trip takers



Destination types to Wales in 2022

- Overnight visitors to Wales stayed in a range of different destination types in 2022. Aligned with their general preferences, the Irish holiday market were most likely to favour urban destinations - just over a quarter (27%) going to a 'city or large town' or a 'historic or heritage town'.
- Although they were least likely to stay overnight in 'mountains or hills', a 'large resort hotel' or a 'traditional seaside resort', each of these destination types attracted around 1 in 5 visitors.

Figure 35. Destination types during this trip in Wales in 2022, Percentage, All 2022 Wales trip takers

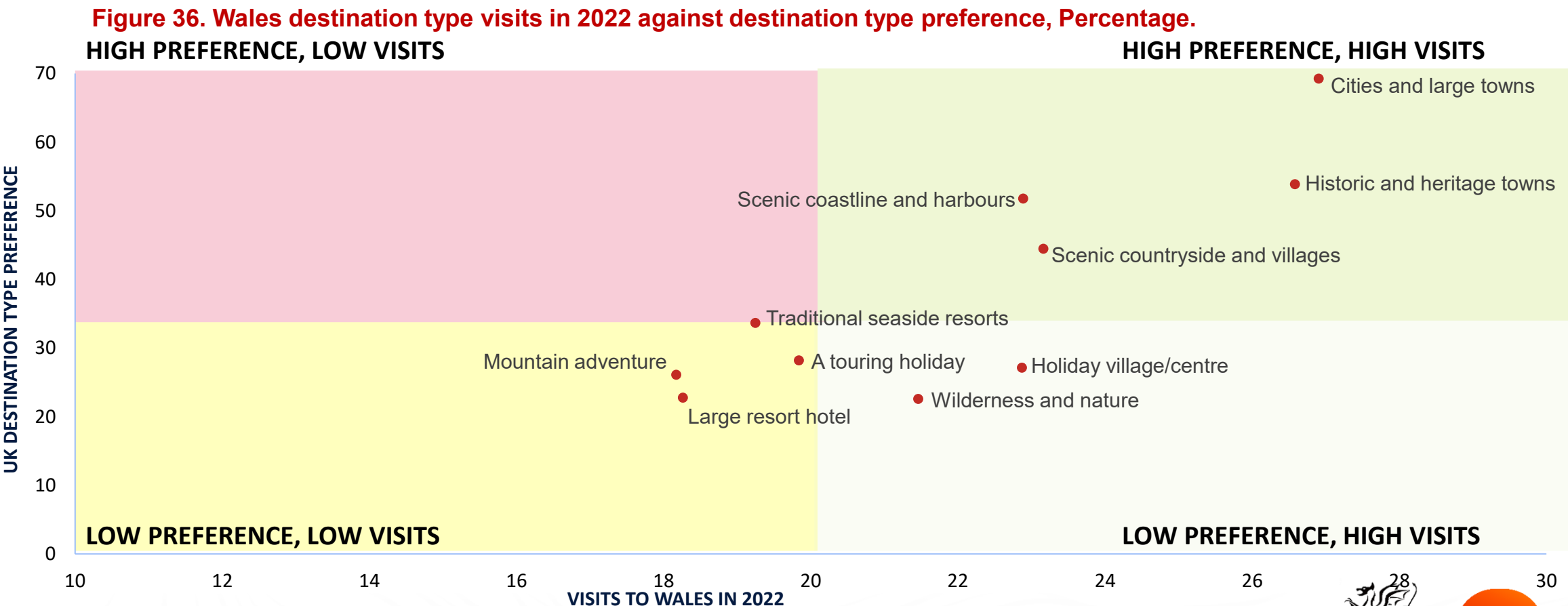


D5. Which of the following best describes the main type/s of destination you stayed in during this trip in Wales?

Base: All 2022 Wales trip takers n=96

Destination type preferences compared to Wales visits in 2022

- The type of destinations the Irish market visited in Wales in 2022 broadly aligns with their general destination preferences – ‘cities and large towns’ and ‘historic and heritage towns’ leading the way on both. Urban destinations are followed by scenic areas in preference and visits.



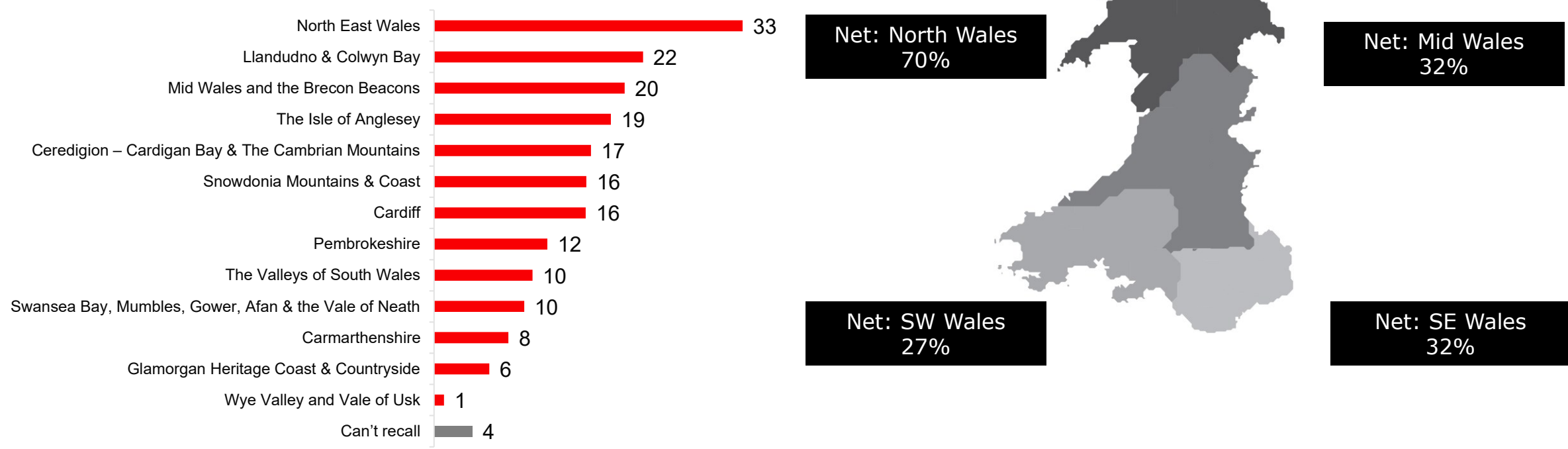
B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a holiday or short break in the UK in the next 12 months? D5. Which of the following best describes the main type/s of destination you stayed in during this trip in Wales? Base: All respondents n=599



Destinations visited in Wales in 2022

- Generally, North Wales was visited by the majority of Wales overnight visitors at 70%.
- Outside of North Wales, overnight visits to the rest of Wales were spread fairly evenly between the other three Welsh regions.

Figure 37. Wales destinations visited on trip in 2022, Percentage, All 2022 Wales trip takers



D6. Where in Wales did you stay overnight on this trip?
Base: All 2022 Wales trip takers n=96 North Wales = North East Wales, Llandudno & Colwyn Bay, Snowdonia Mountains & Coast, The Isle of Anglesey; Mid Wales = Mid Wales and the Brecon Beacons and Ceredigion; SW Wales = Pembrokeshire, Carmarthenshire and Swansea Bay; SE Wales = Cardiff, The Valleys of South Wales, Glamorgan Heritage Coast and Wye Valley

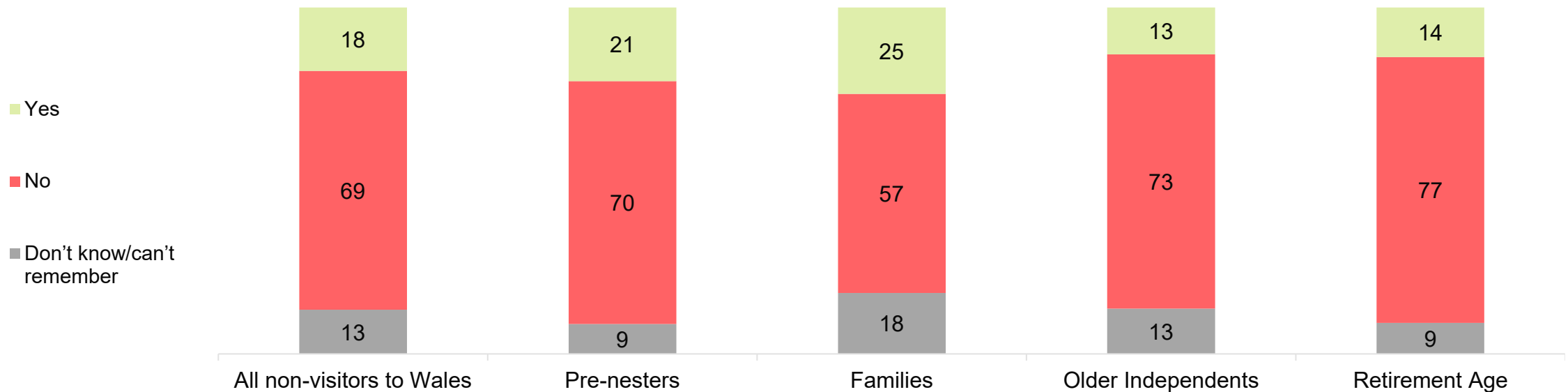
Non visitors to Wales in 2022



Destination consideration amongst non-visitors

- Of those that didn't visit Wales for a holiday or short break in 2022, 18% did consider doing so at some stage. 69% did not consider Wales at any stage. Pre-nester and family life stage non-visitors were the most likely to be considering Wales at some stage – retirees and older independents least likely.

Figure 38. Whether considered a Wales trip in 2022, Percentage, All respondents not taken a Wales trip in 2022 and by life stage

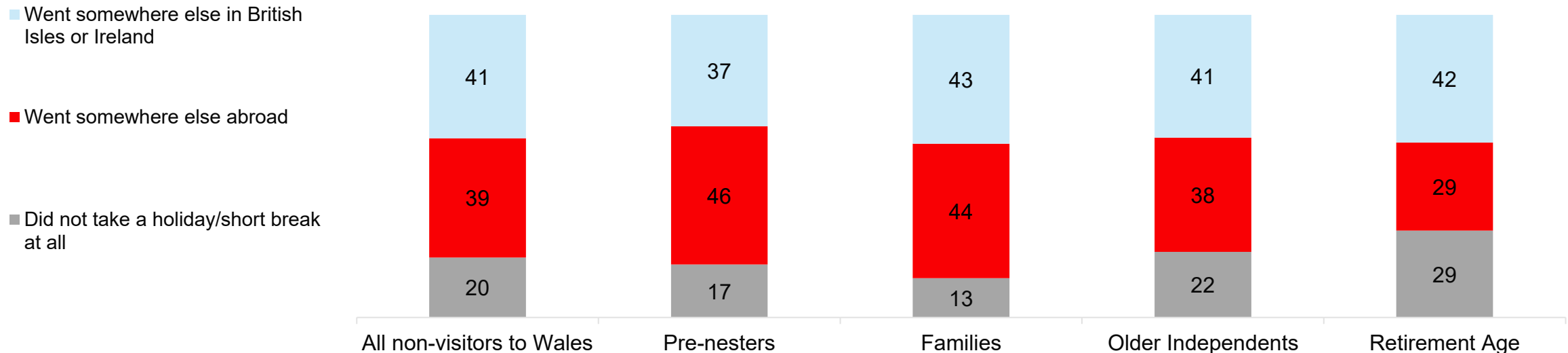


E1. You indicated that you did not take a holiday or short break in Wales in 2022. Were you considering a trip in Wales in 2022 at any stage? Base: All respondents not taken a Wales trip in 2022 n=503. Pre-nesters n=70; Families n=153; Older Independents n=211; Retirees n=69

Destination consideration amongst non-visitors

- Just over 2 in 5 (41%) of non-visitors to Wales in 2022 went elsewhere in the UK or Ireland instead, and a similar proportion (39%) went somewhere else abroad. 1 in 5 didn't take a holiday/short break at all. Younger life stages were most likely to have opted for a trip somewhere else abroad, with older independents and retirees the most likely to have not taken a holiday or short break at all.

Figure 39. Whether taken a trip somewhere else in 2022, Percentage, All respondents not taken a Wales trip in 2022



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

Base: All respondents not taken a Wales trip in 2022 n=503. Pre-nesters n=70; Families n=153; Older Independents n=211; Retirees n=69



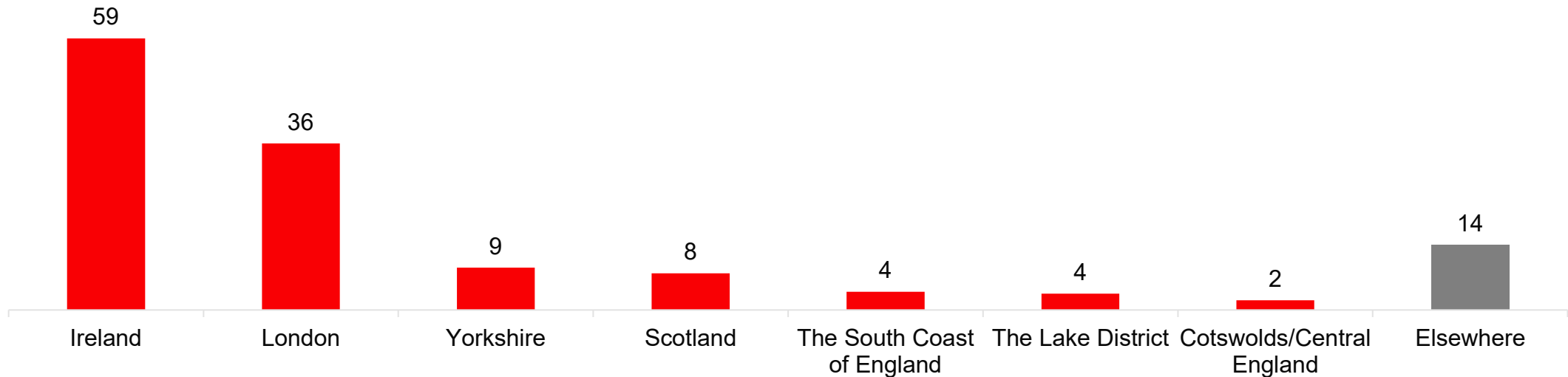
Llywodraeth Cymru
Welsh Government



Destination in British Isles/Ireland visited instead of Wales

- Ireland and London are the destinations non-visitors to Wales were most likely to have visited for a holiday/short break in 2022. Around 1 in 11 (9%) went to Yorkshire and 1 in 12 (8%) to Scotland.

Figure 40. Trip destination region instead of Wales, Percentage, All not taken a Wales trip in 2022 but went elsewhere in British Isles



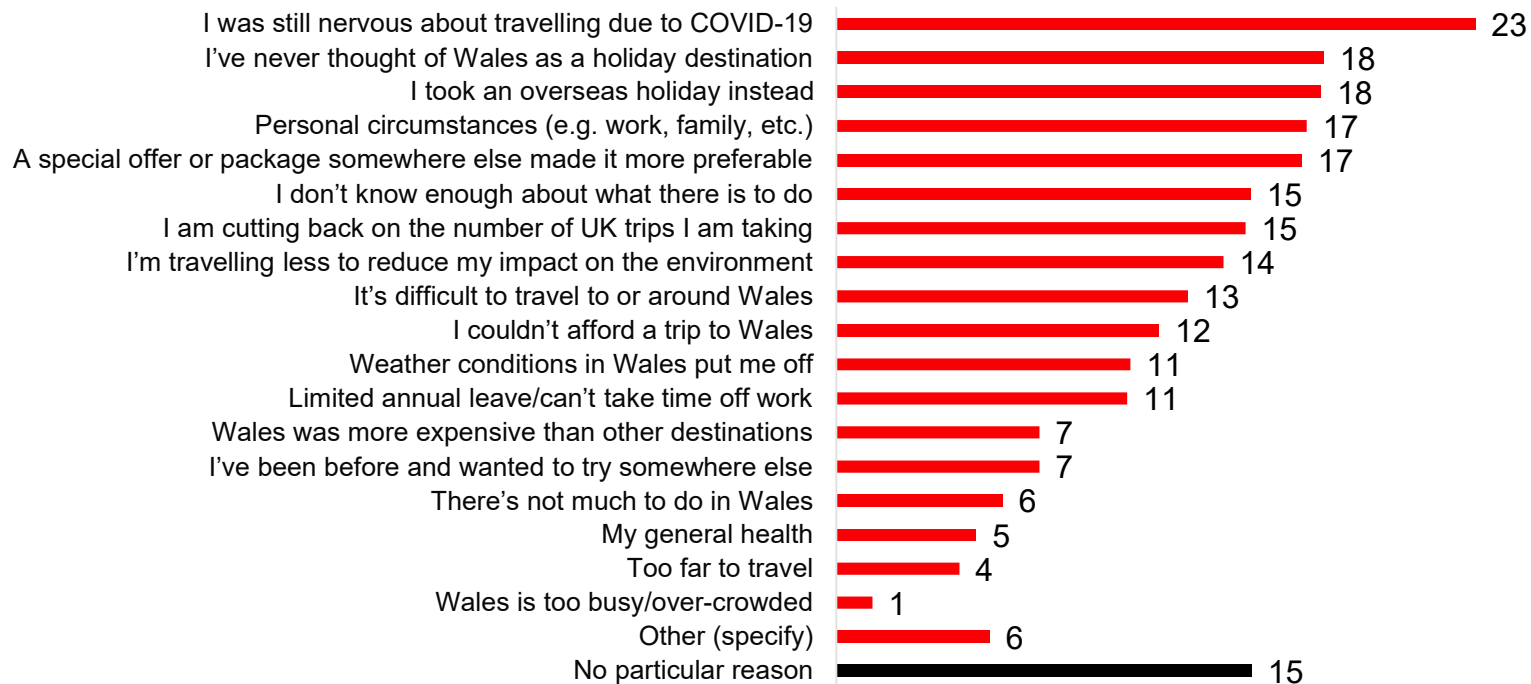
E3. To which of the following areas of British Isles and Ireland did you go on your holiday/short break in 2022?

Base: All respondents not taken a Wales trip in 2022 and went elsewhere in British Isles n=206

Reasons for not taking an overnight Wales trip in 2022

- Nervousness about travelling due to COVID-19 was the number one reason the Irish holiday market gave for not visiting Wales in 2022, with 23% stating this. Beyond this, the leading reasons were 'I've never thought of Wales as a holiday destination' (18%) and 'I took an overseas holiday instead' (18%).
- A range of other reasons were given, including 'personal circumstances' (17%), 'a special offer or package for somewhere else' (17%) 'not knowing enough about what there is to do' (15%), and 'cutting back on the number of UK trips taken' (15%).

Figure 41. Reasons why didn't take a trip to Wales in 2022, Percentage, All respondents not taken a Wales trip in 2022



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

Base: All respondents not taken a Wales trip in 2022 n=503

Visits to Wales in 2023



Overnight Wales trips intended in 2023

- Around 1 in 7 (15%) of the Irish holiday market have either ‘already booked’ or ‘are definitely visiting’ Wales for a holiday/short break in 2023 with a further 1 in 5 indicating they will ‘probably’ visit. Only a minority have ‘already booked’ their trip however.
- Families make up nearly half (47%) of Wales intenders, and are more likely than other life stages to indicate they will definitely visit Wales for an overnight trip in 2023. Pre-nesters make up 1 in 5 of all intenders, and demonstrate considerable interest, although this is more driven by ‘probably’ than ‘definitely’. Older independents and retirees are the least likely to report intending to take a Wales trip during 2023, although they are more likely to be unsure/undecided than other life stages.

Figure 42. Breakdown of 2023 Wales intenders by life stage, Percentage, All respondents

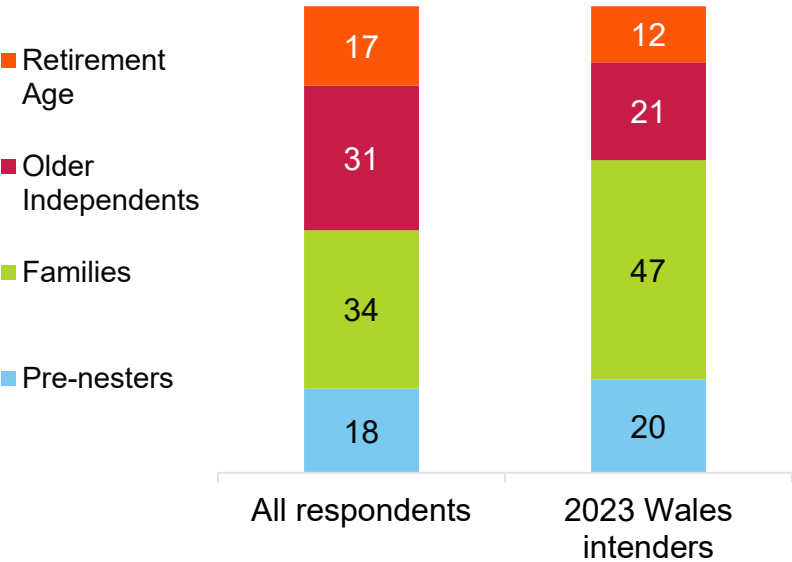
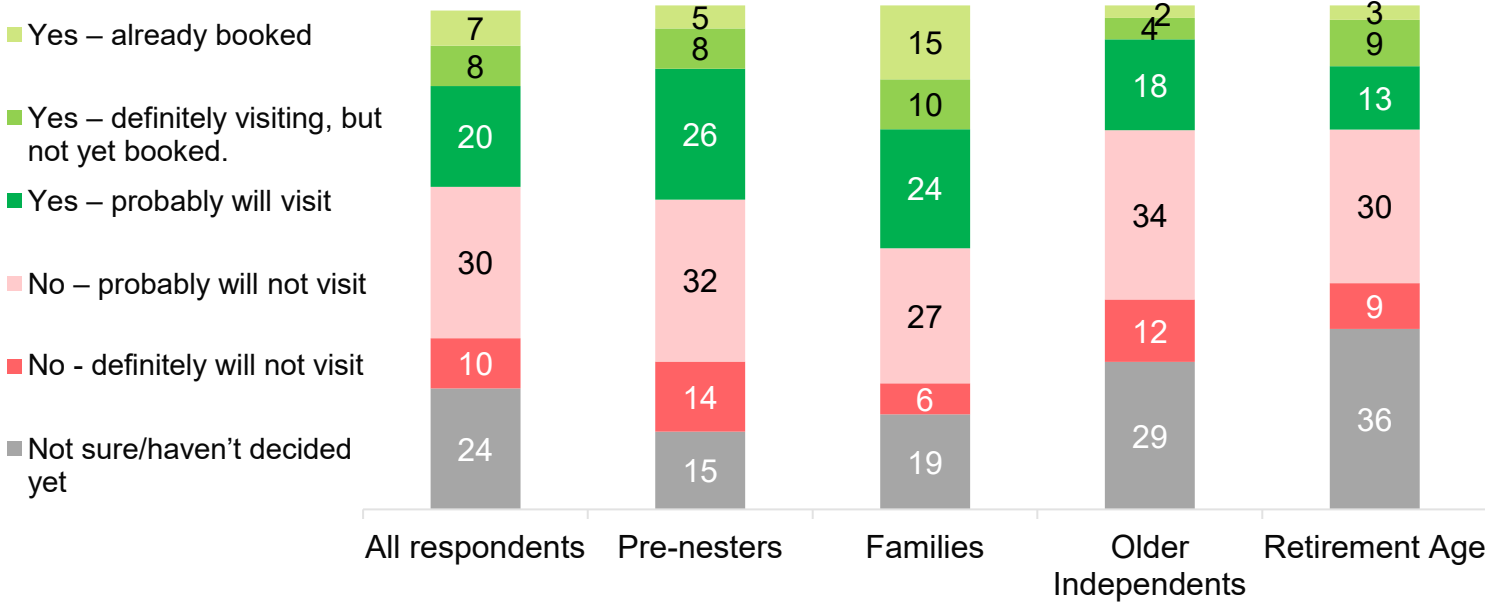


Figure 43. Wales trips intended in 2023, Percentage, All respondents



F1. Are you intending to take a holiday or short break in Wales in 2023?
Base: All respondents n=599 Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74;
2023 Wales intenders n=199; 2023 Wales non-intenders n=400



Overnight Wales trips intended in 2023 by region of residence

- Residents of Dublin are the most likely to have either ‘already booked’ or to be ‘definitely visiting’ Wales for a holiday or short break in 2023, followed by residents of Leinster – two regions that make up nearly two thirds (64%) of all Wales 2023 intenders. Those who live in Connacht-Ulster or Munster are the least likely to be planning on overnight Wales trip in 2023, making up around a third of all Wales 2023 intenders.

Figure 44. Already booked/definitely visiting Wales in 2023 by region of residence, All respondents

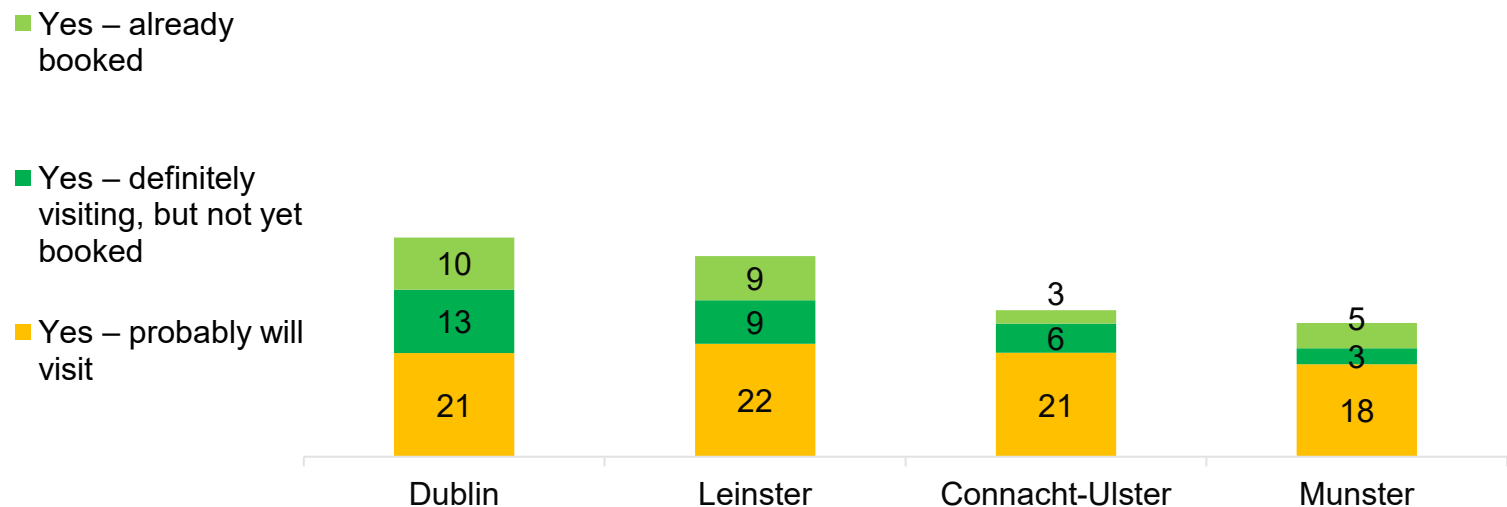
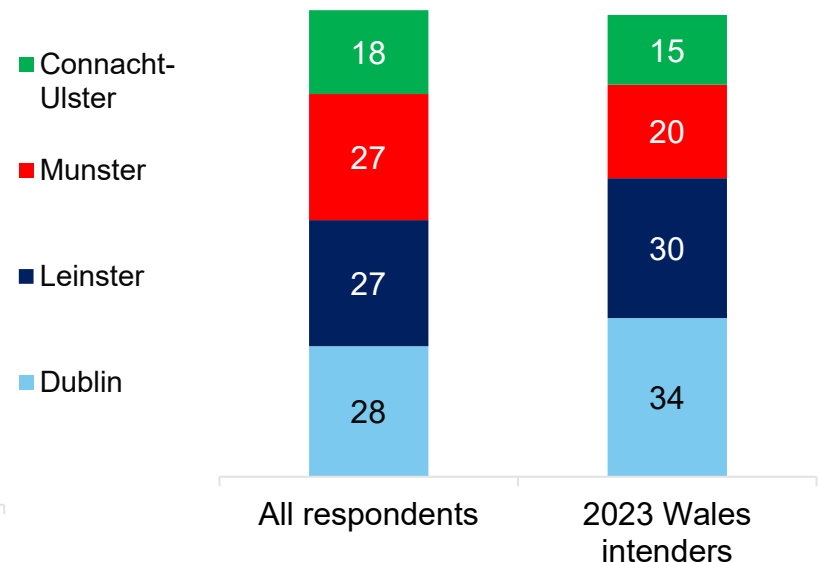


Figure 45. Breakdown of 2023 Wales intenders by region of residence, Percentage, All respondents



F1. Are you intending to take a holiday or short break in Wales in 2023?
Base: All respondents Leinster n=177; Connacht Ulster n=104; Munster n=169; Dublin n=149;
2023 Wales intenders n=199; 2023 Wales non-intenders n=400

Overnight Wales trips intended in 2023 by segment

- Experience seekers and Cultural Buffs are the segments most likely to have ‘already booked’ or to be ‘definitely visiting’ Wales for an overnight holiday or short break in 2023, making up around a third of Wales 2023 intenders between them. Adventurers and Explorers are less likely to be certain of a visit but a notable minority (23% and 19% respectively) state they will ‘probably’ visit.

Figure 46. Already booked/definitely visiting Wales in 2023 by SEGMENT, All respondents

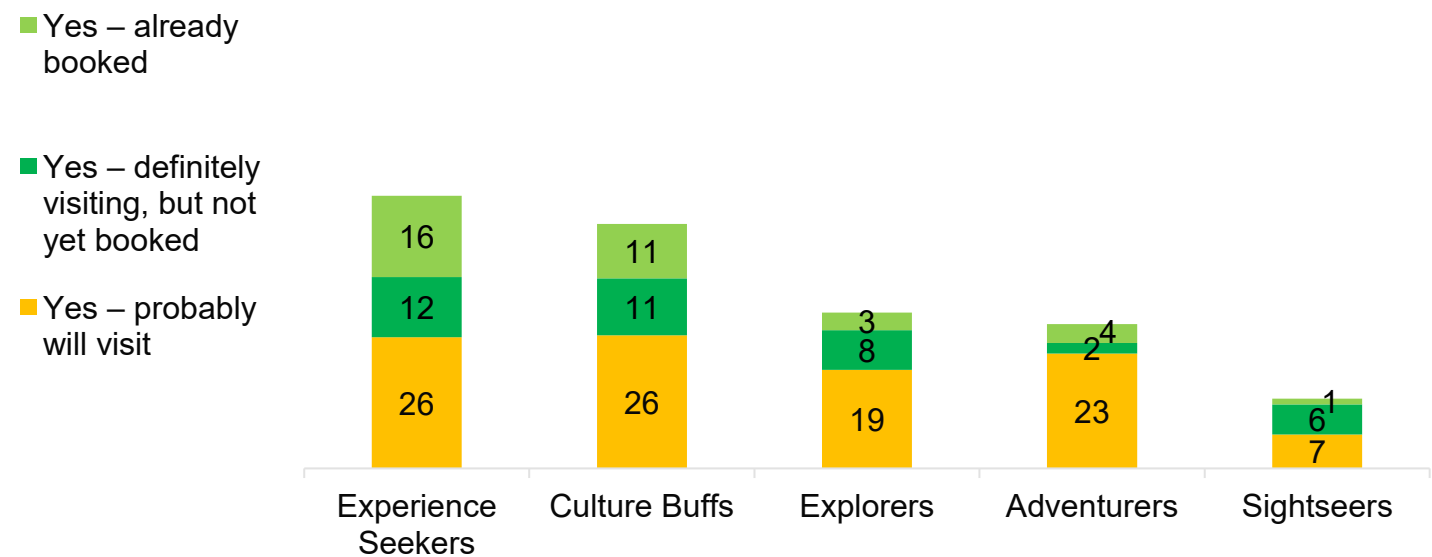
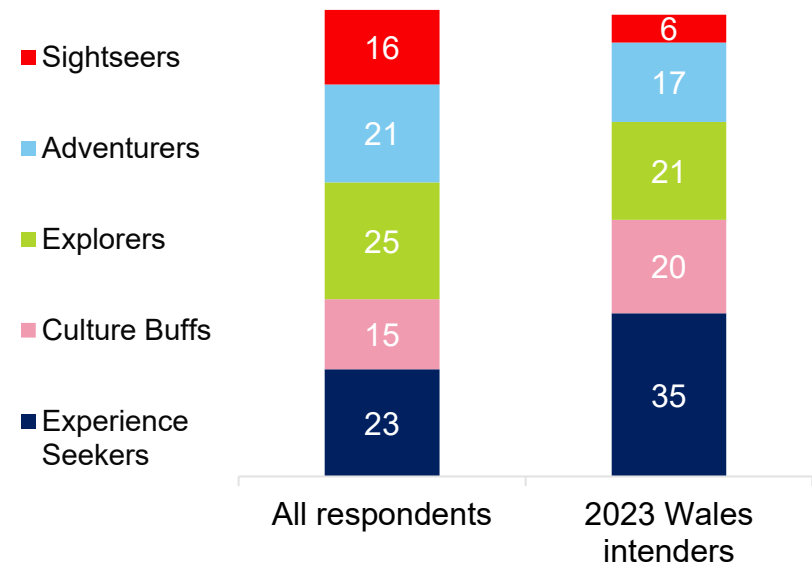


Figure 47. Breakdown of 2023 Wales intenders by segment, Percentage, All respondents

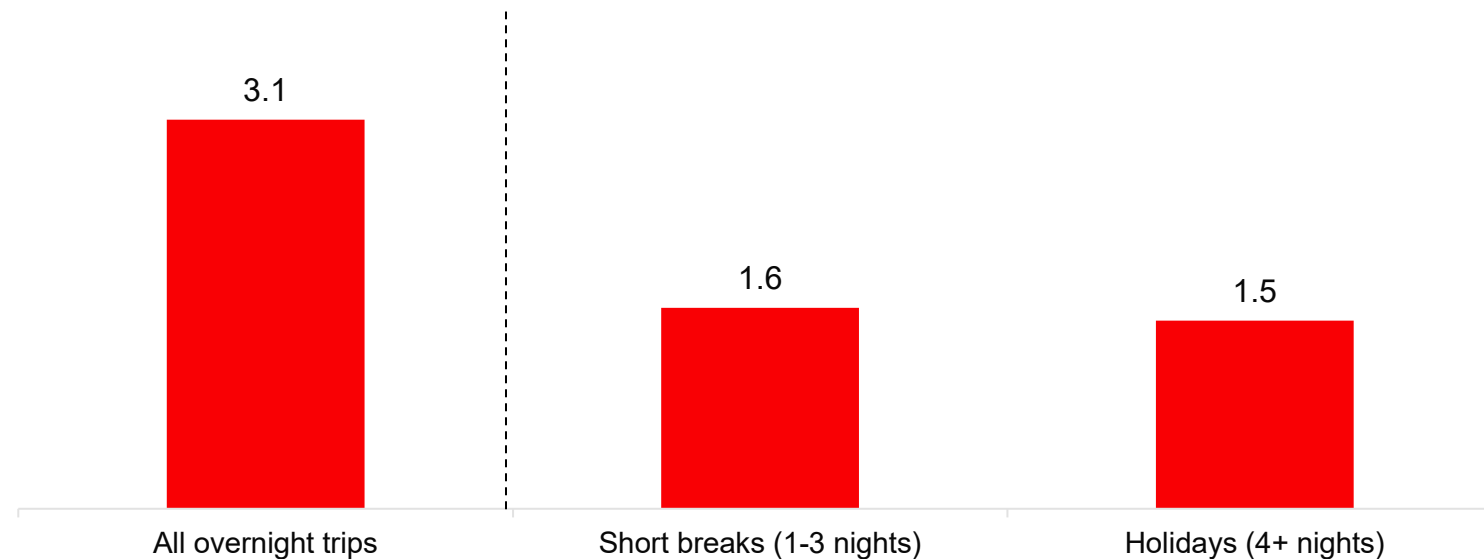


F1. Are you intending to take a holiday or short break in Wales in 2023?
Base: Adventurers n=136; Experience seekers n=122; Explorers n=150; Sightseers n=102; Cultural Buffs n=89;
2023 Wales intenders n=199; 2023 Wales non-intenders n=400

Number of nights for Wales 2023 trip

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

Figure 48. Average number of Wales trips intended, All 2023 Wales Intenders



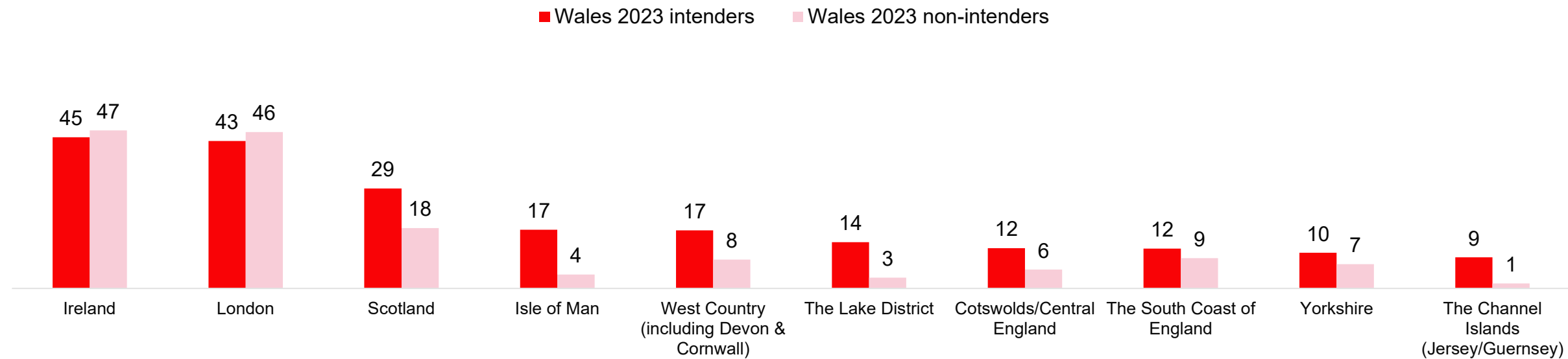
F2. Roughly how many holidays or short breaks do you plan on taking in Wales in 2023?

Base: All Wales 2023 intenders n= 199

Other UK/Ireland locations considered

- Nearly half of Ireland residents planning an overnight trip to Wales are also considering an overnight trip in Ireland in 2023, a similar proportion to non-intenders
- Within mainland Britain, both Wales intenders and Wales non-intenders are most likely to be considering London, followed by Scotland. Other destinations are also being considered by lower proportions of respondents.

Figure 49. UK and Ireland locations considered for visiting for a holiday or short break in 2023, Percentage, All 2023 Wales intenders and non-Intenders



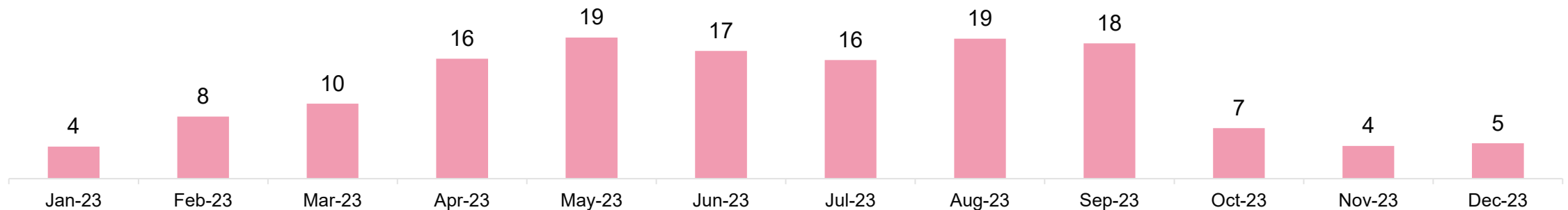
F14/F16. Where, if anywhere, else in the UK and Ireland are you seriously considering visiting for a holiday or short break in the next 12 months?

Base: All respondents planning a trip to Wales in 2023 n=199 All respondents not planning a trip to Wales in 2023 n=400

Months intending to take a trip in Wales

- Of the Irish holiday market intending to take an overnight trip to Wales, there is relatively even interest in taking the trip in the spring and summer months between April and September. The autumn and winter months of January to March and October to December are less popular among Wales intenders.
- Although base sizes for each month are too low for robust analysis, the data indicates* that families are more likely to intend to take a Wales trip in the peak summer months of July and August, with all other life stages more likely to be planning a trip outside of these months.

Figure 50. Months intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



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

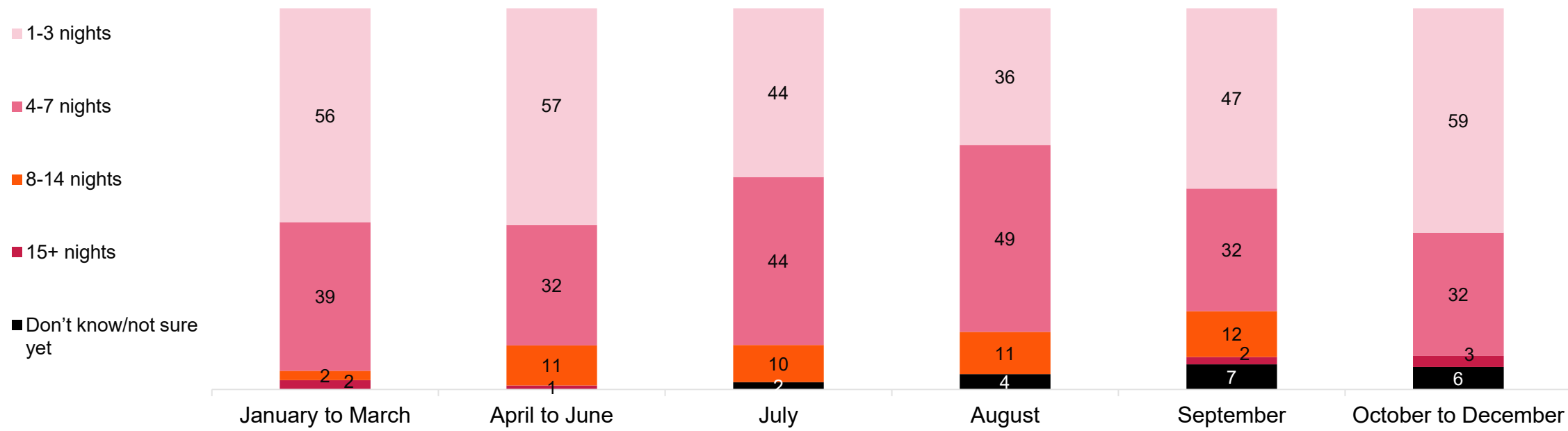
Base: All Wales 2023 intenders n= 199

*Where results are described as 'indicative', this is due to low base sizes. Treat with caution.

Number of nights for Wales 2023 trip by Month

- Between January and June, and from October to December, overnight trip intenders are more likely to be planning a short break in Wales than a holiday of 4+ nights. However, in July and August longer trips are more prevalent – around 1 in 10 planning a trip of 8+ nights. In September, there is a relatively equal balance between short breaks and longer trips.

Figure 51. Number of nights intending to stay in Wales in 2023, Percentage, All 2023 Wales Intenders



F4. Roughly how many nights do you anticipate spending on your holidays or short breaks in Wales in these months?
Base: January to March n=41*; April to June n=95; July n=33*; August n=38*; September n=41*; October to December n=34*

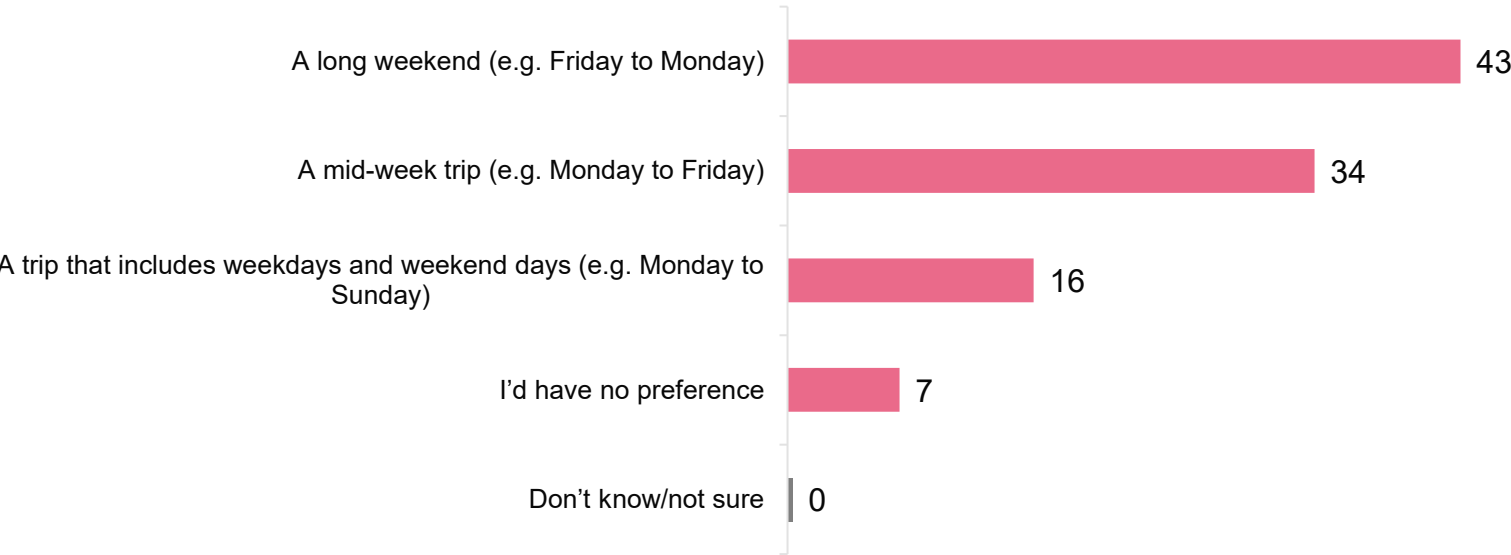
*Caution: Low base size – treat indicatively only. Months merged due to low base sizes. July and September not merged due to key differences but please treat with caution



Time of the week for NEXT Wales 2023 trip

- Around 2 in 5 (43%) Wales trip intenders anticipate that their next overnight Wales trip will be ‘a long weekend’, with approximately 1 in 3 expecting it to be a ‘mid-week trip’.
- Indicatively*, retirees are more likely to be planning a ‘mid-week trip’ with all other life stages more likely to be planning a ‘long weekend’.

Figure 52. Time of week intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



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

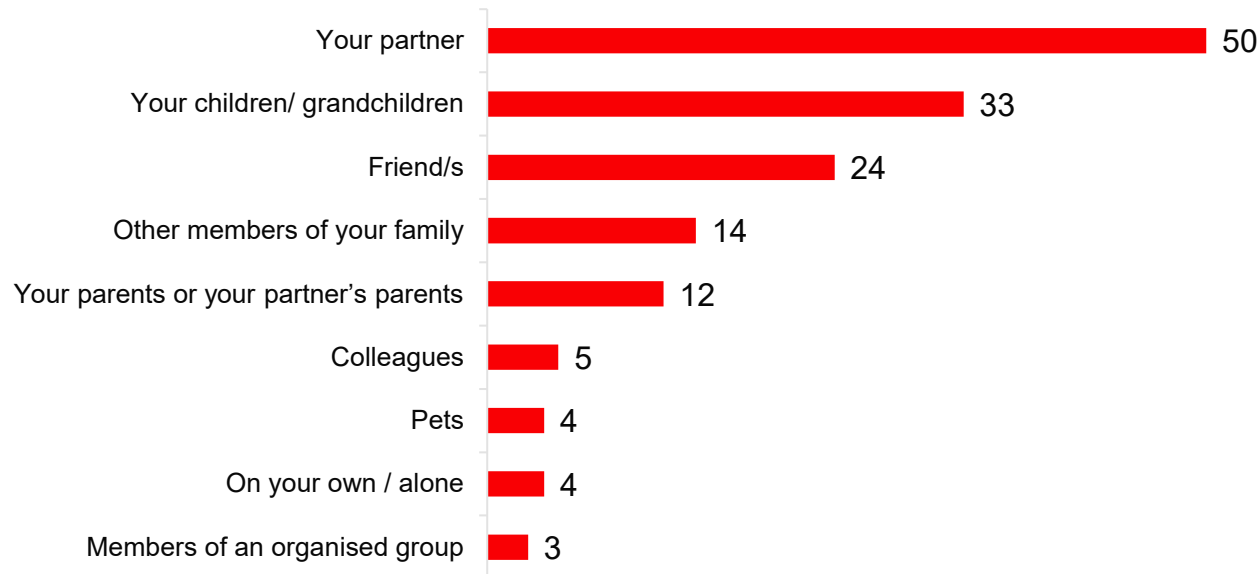
Base: All Wales 2023 intenders n= 199

*Where results are described as ‘indicative’, this is due to low base sizes. Treat with caution.

Party composition for NEXT trip in Wales in 2023

- Half of Wales intenders plan to visit Wales with their partner on their next trip and a third with their children/ grandchildren. Friends will accompany just under 1 in 4 (24%). A notable minority of parties will include 'other members of the family' (14%) and 'parents or partner's parents' (12%).
- Party composition differs by life stage – albeit indicatively.* Pre-nesters are more likely to plan on travelling with friends, families are more likely to travel with their 'children or grandchildren' and older independents/retirees with their partner.

Figure 53. Who is likely to accompany those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



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

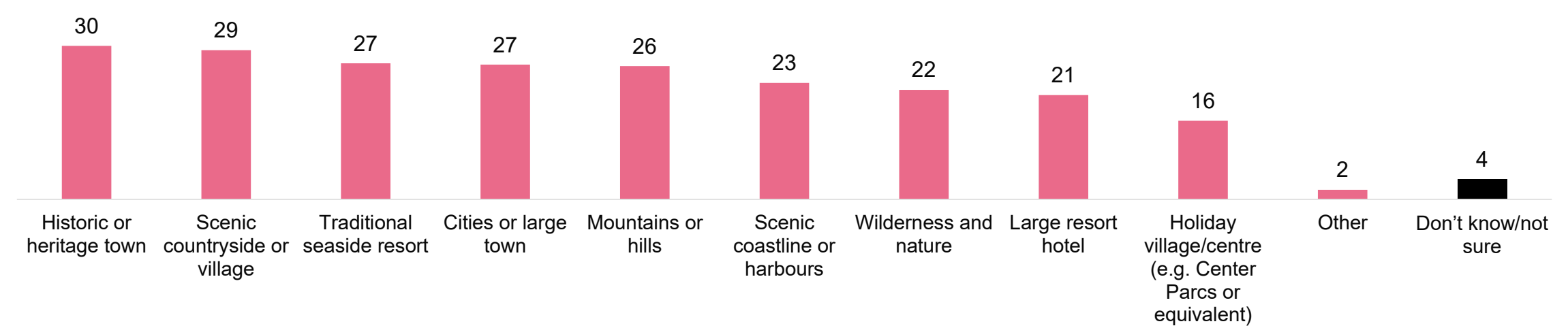
Base: All Wales 2023 intenders n= 199

*Where results are described as 'indicative', this is due to low base sizes. Treat with caution.

Destination preference for NEXT Wales 2023 trip

- With the exception of ‘holiday village/centre’, at least 1 in 5 of Wales intenders plan on staying in each destination type tested within this survey. The most popular destination types are ‘historic or heritage town’, ‘scenic countryside or village’, ‘traditional seaside resort’ and ‘cities or large town’.
- Older independents and retirees are indicatively* more likely to favour staying in a ‘historic or heritage town’ and ‘scenic coastline or harbours’. Pre-nesters and families are more likely to plan on staying in ‘mountains or hills’. Families are the only life stage that show a strong interest in staying in a ‘large resort hotel’.

Figure 54. Type of destination of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



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

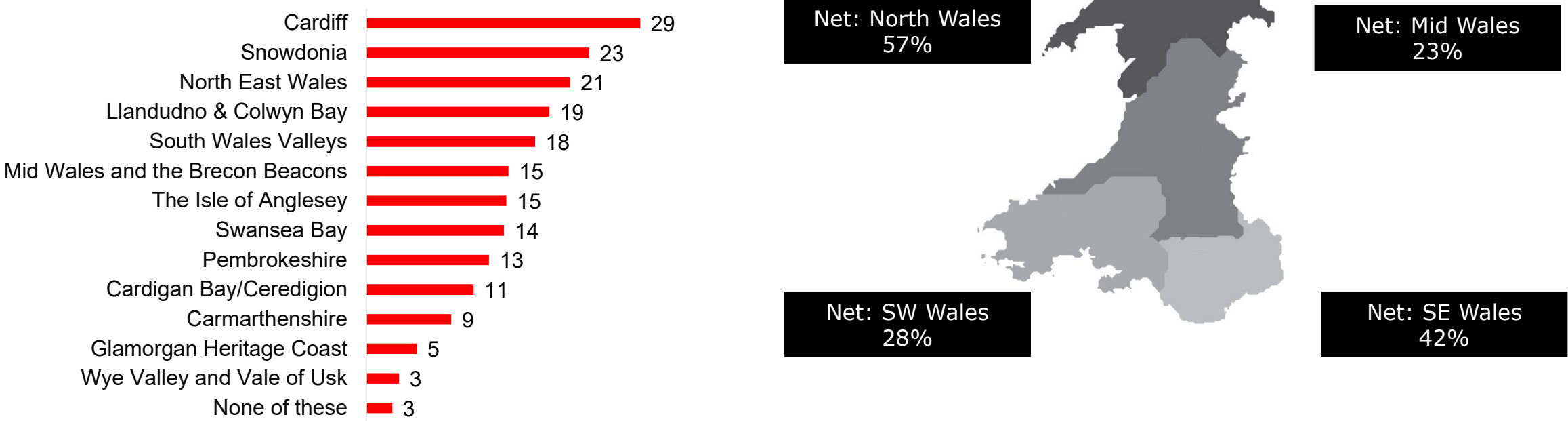
Base: All Wales 2023 intenders n= 199

*Where results are described as ‘indicative’, this is due to low base sizes. Treat with caution.

Areas planned on staying overnight when taking NEXT trip in Wales

- Cardiff is the area most likely to be visited by intenders from the Irish holiday market on their next Wales trip. At a regional ('net') level, the majority (57%) of intenders are likely to visit North Wales (within which Snowdonia, North East Wales and Llandudno & Colwyn Bay are the leading destinations). 28% plan on staying overnight in South West Wales, and 23% in Mid Wales.
- Due to low base sizes there are no clear patterns by life stage, with the exception of pre-nesters being more likely to stay overnight in Cardiff – a finding that aligns with their general destination and experience preferences.

Figure 55. Areas of stay of those intending to take next trip in Wales, Percentage, All 2023 Wales Intenders



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

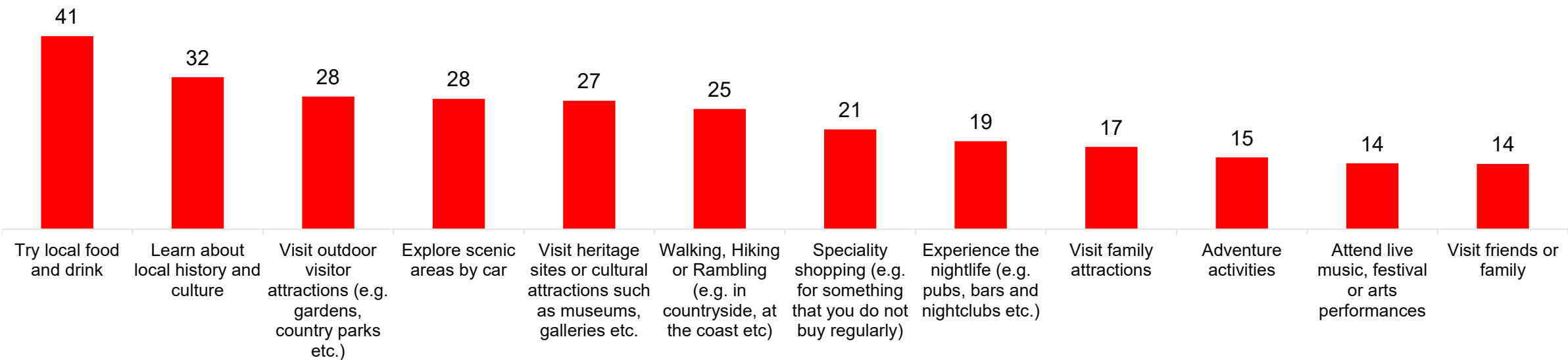
Base: All Wales 2023 intenders n= 199

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

Activities planned on NEXT Wales trip

- ‘Trying local food and drink’ is the leading activity planned by visitors to Wales from Ireland in 2023, followed by ‘learning about local history and culture’, ‘visiting outdoor visitor attractions’ and ‘exploring scenic areas by car’. ‘Visiting heritages sites or cultural attractions’ and ‘walking, hiking or rambling’ also appealed to approximately 1 in 4 intenders.
- Indicatively,* retirees are more likely to be interested in ‘learning about local history and culture’ and ‘visiting heritage sites or culture’ than other life stages.

Figure 56. Top 12 activities of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



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

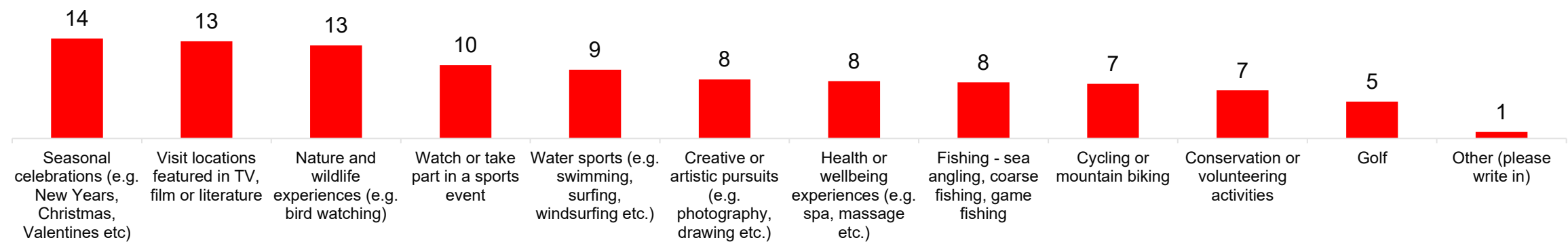
Base: All Wales 2023 intenders n= 199

*Where results are described as ‘indicative’, this is due to low base sizes. Treat with caution.

Activities planned on NEXT Wales trip

- A number of other activities appeal to the Irish holiday market, albeit at a more niche level. Examples include ‘seasonal celebrations’, ‘visiting locations features in TV, film or literature’ and ‘nature and wildlife experiences’. ‘Golf’, ‘conservation and volunteering’, and ‘cycling or mountain biking’ are the least planned activities for a short break or holiday in Wales in 2023.

Figure 57. Bottom 12 activities of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders

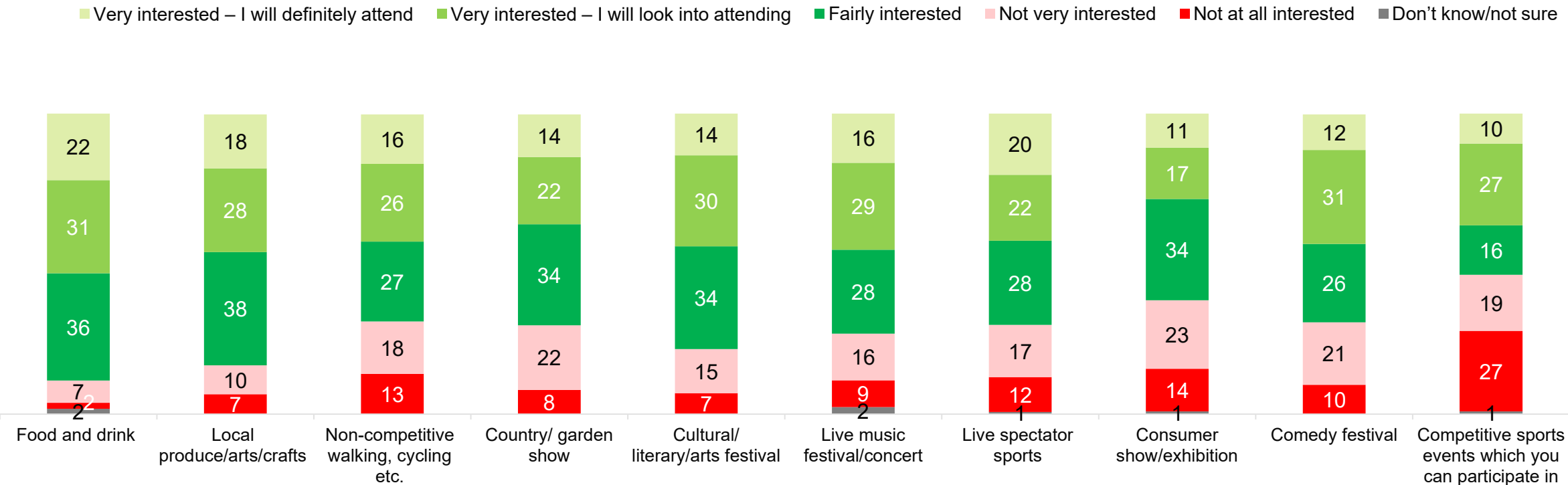


F9. Which, if any, of these activities are you likely to do on your next short break or holiday in Wales in?
Base: All Wales 2023 intenders n= 199

Interest in attending the festivals or events in Wales

- There is strong general interest in festivals/events in Wales amongst Wales 2023 intenders. Intenders are most likely to report that they will definitely attend ‘food and drink’, ‘local produce/arts/crafts’, ‘non-competitive walking/cycling’, ‘country/garden shows’ and ‘cultural/literary/arts festival’ events.

Figure 58. Interest in festivals/events of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



F10. How, if at all, interested would you be in attending the below types of festivals or events in Wales in 2023?
Base: All Wales 2023 intenders n= 199

Sources of information to use when taking a trip in Wales

- Trip-takers to Wales are likely to use a range of sources to plan their 2023 overnight short break or holiday – ‘a friend or family’s social media activity’, ‘conversations with friends/family’, and ‘printed travel guide books/brochures’ are the most prevalent.
- There are some indicative* differences by life stage – pre-nesters are more likely to use social media than other life stages, and retirees are more likely to rely on ‘conversations with friends/family’. Both older independents and retirees are more likely to use ‘traveller review websites’.

Figure 59. Sources of information used/likely to use of those intending to take a trip in Wales, Percentage, All 2023 Wales Intenders



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

Base: All respondents intending to take a Wales trip n= 199

*Where results are described as 'indicative', this is due to low base sizes. Treat with caution.

Barriers to visiting Wales in 2023



Reason for not visiting Wales in the next 12 months

- The leading reason the Irish holiday market gave for not planning a short break or holiday in Wales in the next 12 months is ‘I am taking an overseas holiday instead’ – 1 in 5 (20%) stating this. A range of other reasons were also mentioned, including ‘I don’t know enough about what there is to do’ (15%), ‘personal circumstances’ (14%), ‘I am cutting back on the number of UK trips I am taking’ (14%) and ‘I’ve never thought of Wales as a holiday destination’ (14%).

Figure 60. Top 10 reasons for not visiting Wales for a holiday or short break in 2023, Percentage, All 2023 non-visitors to Wales



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

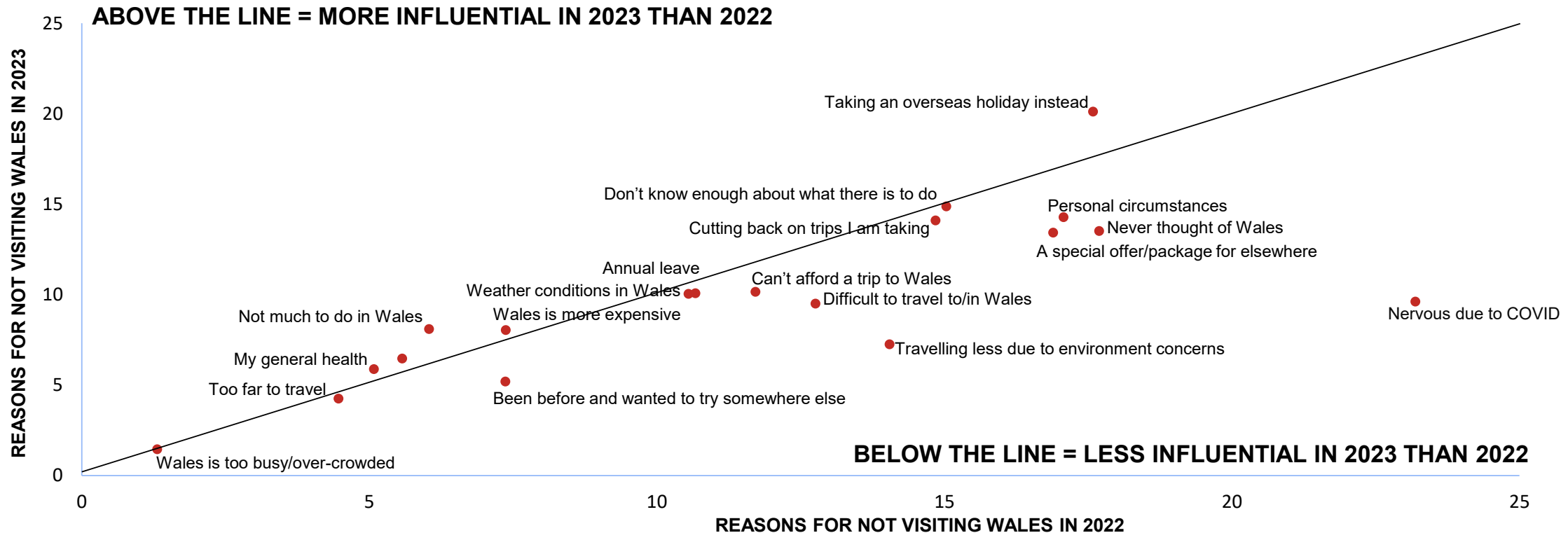
Base: All respondents not planning a trip to Wales in 2023 n=400



Reasons for not visiting Wales in 2023 compared to 2022

- Compared to 2022, non-Wales visitors in 2023 are more likely to state that they are 'taking an overseas holiday instead'. Notably, they are less likely to state they are 'nervous due to COVID'. The polarising of these reasons underline how the holiday landscape has changed in the last year for the Irish market.

Figure 61. Reasons for not visiting Wales in 2022 compared to reasons for not planning to visit Wales in 2023, Percentage.



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

Base: All respondents not planning a trip to Wales in 2023 n=400 E4. What are the reasons that you didn't take a holiday or break in

Wales in 2022? Base: All respondents not taken a Wales trip in 2022 n=503

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

- The cost of living crisis is likely to have a widespread influence on trips in Wales in 2023 with 4 in 5 potential visitors indicating some way of managing costs. 'I will look for special offers/deals', 'I will choose cheaper accommodation' and 'I will travel at less expensive times' are the leading ways in which spending is likely to be moderated.
- Broadly those who have been hit harder by the cost-of-living crisis or are 'being careful' are more likely to cut back on trip spending – in particular on accommodation, things to do and eating out. They are also more likely travel at less expensive times and to look for special offers/deals. There is no clear evidence that the 'cost-of-living crisis' will impact when trips are booked.

Figure 62. Top 10 ways in which cost-of-living crisis is likely to influence trips to Wales in 2023, Percentage, All 2023 Wales intenders and cost-of-living impact groups



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

Base: All Wales intenders n=199

The Appeal of Touring/Trails



Long distance trails followed on a UK holiday or short break in the last 5 years

- Over half (54%) of the Irish holiday market claim to have followed a long distance trail on a UK holiday or short break in the last 5 years – ‘walking/hiking’ and ‘self-driving route’ the most popular (see footer for definition of long distance trail). Families are the life stage most likely to have taken a long distance UK trail in the last 5 years, followed by pre-nesters, older independents and retirees. Although older independents and retirees are least likely to have taken a long distance trail, of the trails they are interested in, ‘self-driving routes’ and ‘walking/hiking’ are preferred.

Figure 63. Types of long distance trails followed on a UK holiday or short break in the last 5 years, Percentage, all respondents



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

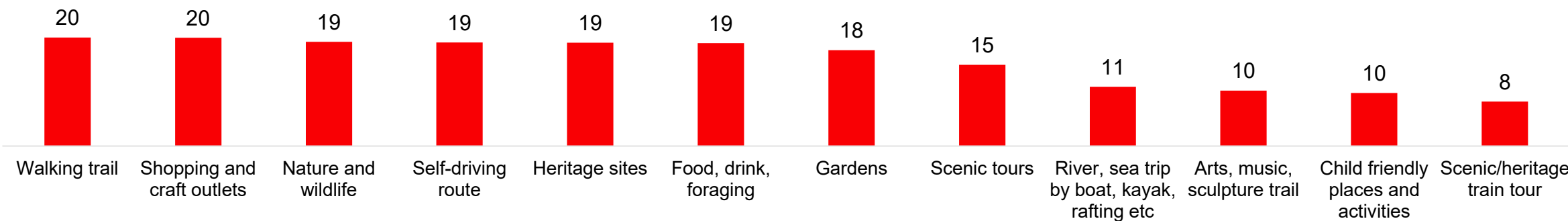
Base: All respondents n=599



Special interest trails followed on a UK holiday or short break in the last 5 years

- Three quarters of ‘the Irish holiday market’ (respondents to this survey) claim to have followed a special interest trail on a UK holiday in last 5 years. Respondents report undertaking a wide range of ‘special interest trails’, with the most popular being ‘walking trails’, ‘shopping and craft outlets’, ‘nature and wildlife’, ‘self-driving routes’, ‘heritage sites’, ‘food, drink and foraging’ and ‘gardens’ – each followed by around 1 in 5.
- By life stage, pre-nesters are most likely to have followed ‘walking trails’ and ‘food, drink and foraging’, while families are most likely to have followed ‘child friendly places and activities’ and ‘nature and wildlife’. Older independents are most likely to have followed ‘shopping and craft outlets’, and retirees to have followed ‘gardens’ and ‘heritage sites’.

Figure 64. Top 12 special interest trails followed on a UK holiday or short break in the last 5 years, Percentage, All respondents



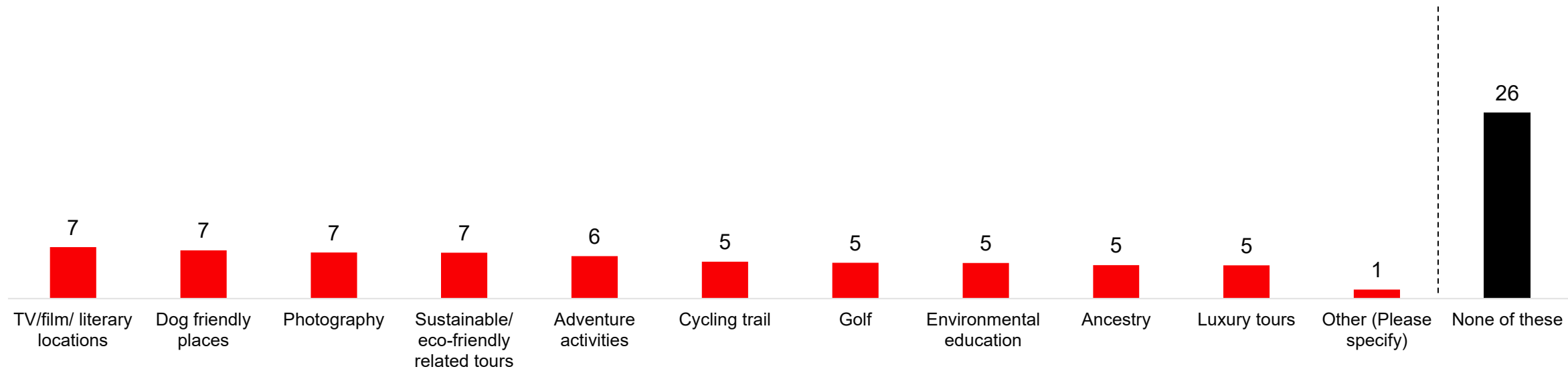
G2. Which, if any, of the following long or short distance special interest trails have you followed on a UK holiday or short break in the last 5 years?
Base: All respondents n=599



Special interest trails followed on a UK holiday or short break in the last 5 years

- There are a wide range of other types of special interest trails that the Irish holiday market has taken in last 5 years, but these have been followed by a relatively small proportion of respondents. These include TV/film/literary locations, dog friendly places, photography, and sustainable/eco-friendly related tours.

Figure 65. Bottom 10 special interest trails followed on a UK holiday or short break in the last 5 years, Percentage, All respondents



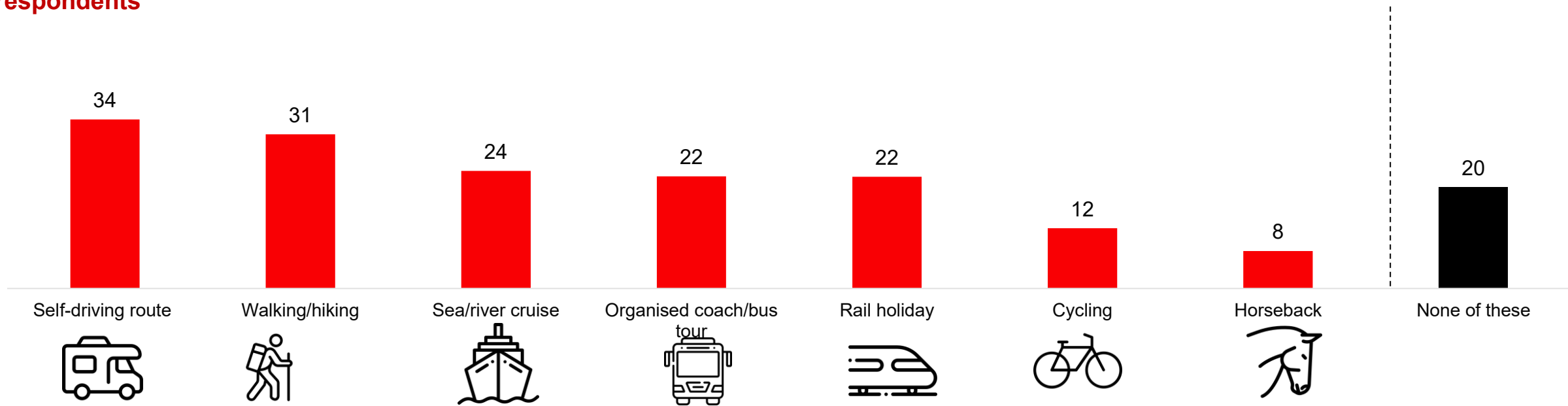
G2. Which, if any, of the following long or short distance special interest trails have you followed on a UK holiday or short break in the last 5 years?
Base: All respondents n=599



Long distance trails interest in Wales

- When looking at long distance trails that visitors would be interested in taking in Wales within the next few years, 'self-driving route' was the most preferred, followed closely by 'walking/hiking'. Only 1 in 12 said that they would consider a long distance trail by horseback, with a similar proportion stating that they would consider a cycling trail.
- Notably, interest in taking a long distance trail in Wales in the next few years is higher than trails taken in the UK in the last five years - in particular for 'self-driving route' and 'walking/hiking', suggesting there is considerable demand for this type of trail in Wales.

Figure 66. Long distance trails interested in following in Wales in the next few years, Percentage, All respondents



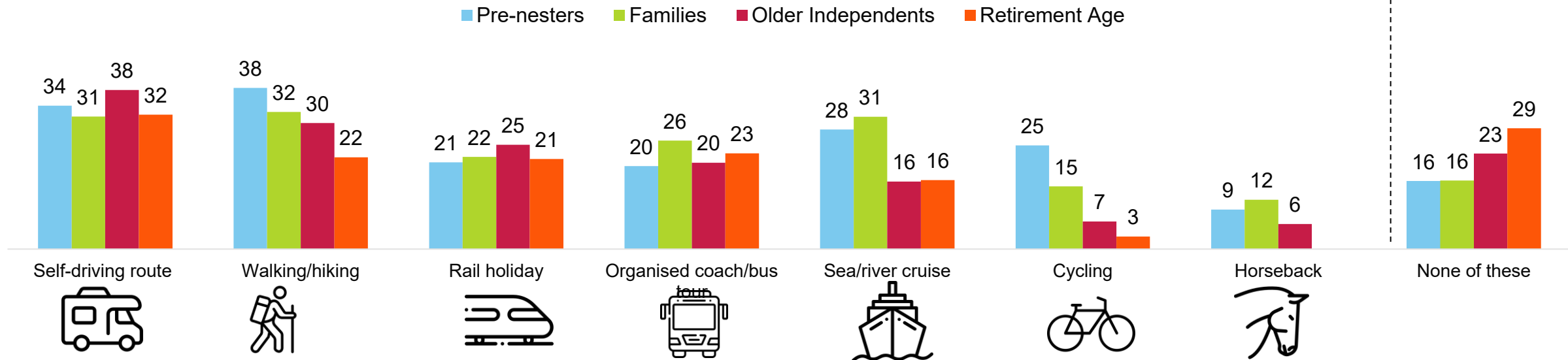
G3. Now looking ahead, which, if any, of these types of long distance trails would you be interested in following on a Wales holiday or short break in the next few years?

Base: All respondents n=599

Long distance trails interest in Wales by life stage

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

Figure 67. Long distance trails interested in following in Wales in the next few years, Percentage, All respondents



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

Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74

Special interest trails appeal on a Wales holiday or short break

- A broad range of special interest trails in Wales appeal to the Irish holiday market, with ‘heritage sites’, ‘scenic tours’ and ‘walking trails’ the top three.
- Notably, as with long-distance trails, interest in taking a special interest trail in Wales in the next few years is higher than those taken in the UK in the last five years. This is particularly the case for trails that include ‘heritage sites’ and ‘scenic tours’ – the latter is the 2nd highest for future interest, but the 8th highest for tours taken.

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

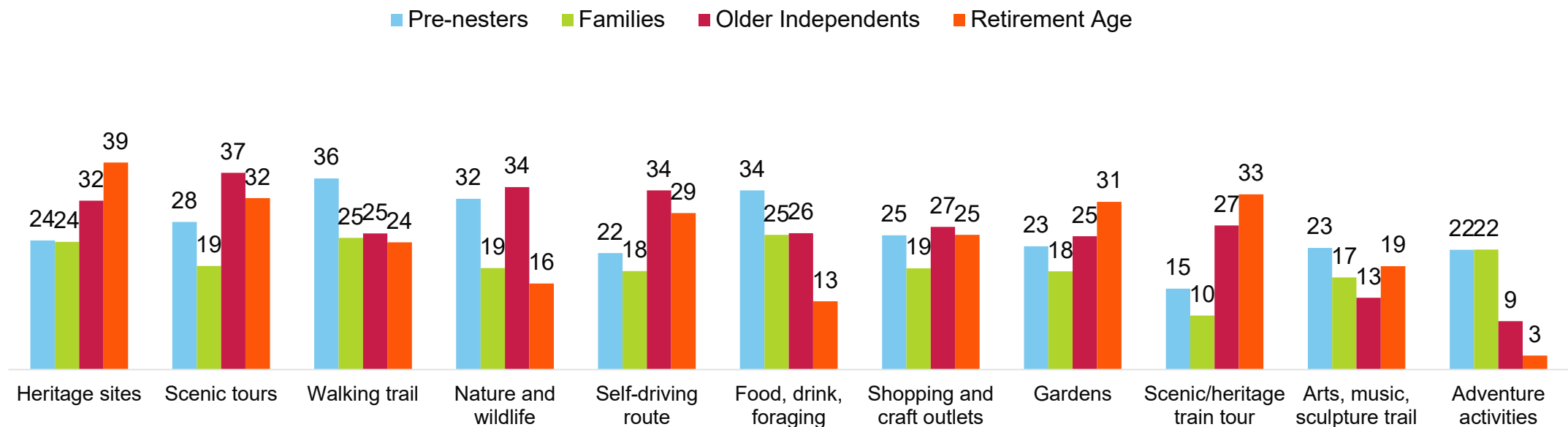


G4. And which, if any, of these types of long or short distance special interest trails would you be interested in following on a Wales holiday or short break in the next few years?
Base: All respondents n=599

Special interest trails appeal on a Wales holiday or short break

- There is clear variation in special interest trails appeal by life stage. For example, ‘food, drink and foraging’, ‘nature and wildlife’ and ‘walking trails’ index higher for pre-nesters, with ‘heritage sites’, ‘self-driving routes’, ‘scenic tours’, ‘scenic/heritage train tours’ and ‘gardens’ of more appeal to older life stages. Older independents are more likely to be interested in ‘nature and wildlife’ than families or retirees. Families are most interested in ‘food, drink and foraging’, ‘walking trails’, ‘heritage sites’ and ‘adventure activities’.

Figure 69. Special interest trails interested in following in Wales in the next few years, Percentage of Top 11, All respondents



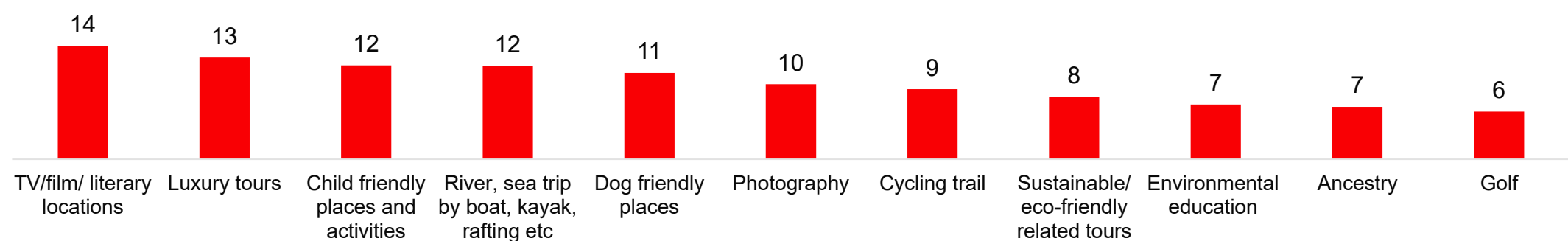
G4. And which, if any, of these types of long or short distance special interest trails would you be interested in following on a Wales holiday or short break in the next few years?
Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74



Special interest trails appeal on a Wales holiday or short break

- A number of other special interest trails are of interest for holidays in Wales, albeit these appeal to a minority of the Irish holiday market. Among these, TV/film/literary locations, luxury tours and child friendly places and activities are of most interest to respondents.

Figure 70. Special interest trails interested in following in Wales in the next few years, Percentage Bottom 11, All respondents

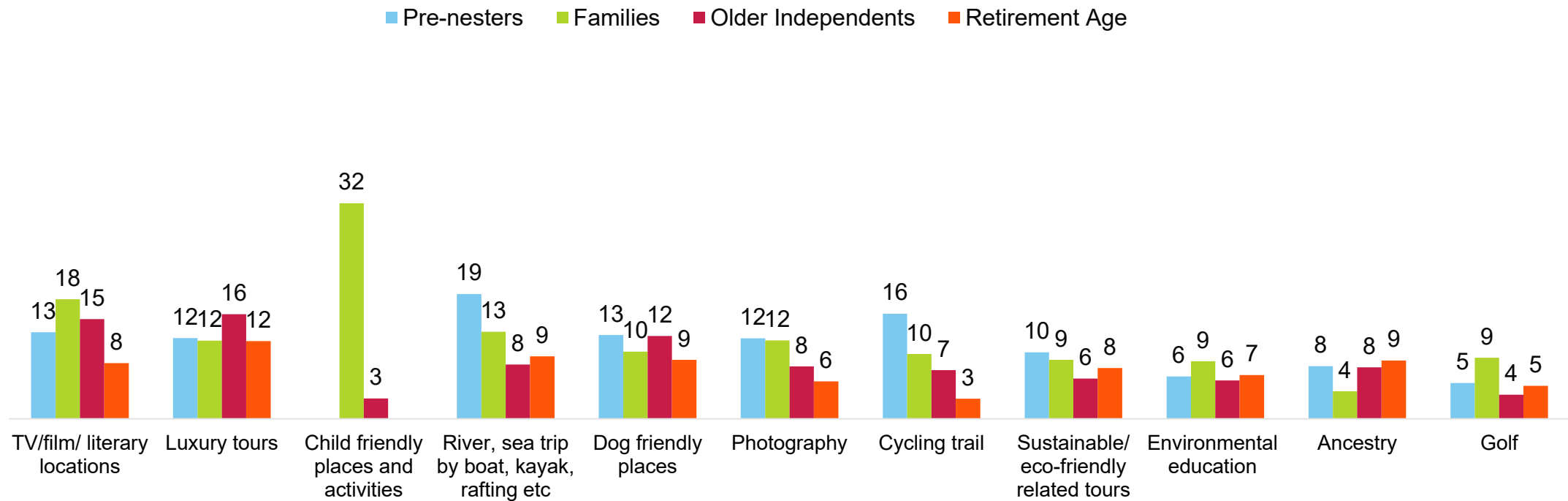


G4. And which, if any, of these types of long or short distance special interest trails would you be interested in following on a Wales holiday or short break in the next few years?
Base: All respondents n=599

Special interest trails appeal on a Wales holiday or short break

- Perhaps unsurprisingly, families index especially high for trails relating to ‘child friendly places and activities’. Interest in ‘photography’, water-based trails and ‘cycling trails’ correlates with age – pre-nesters and families are more likely to report being interested.

Figure 71. Special interest trails interested in following in Wales in the next few years, Percentage Bottom 11, All respondents



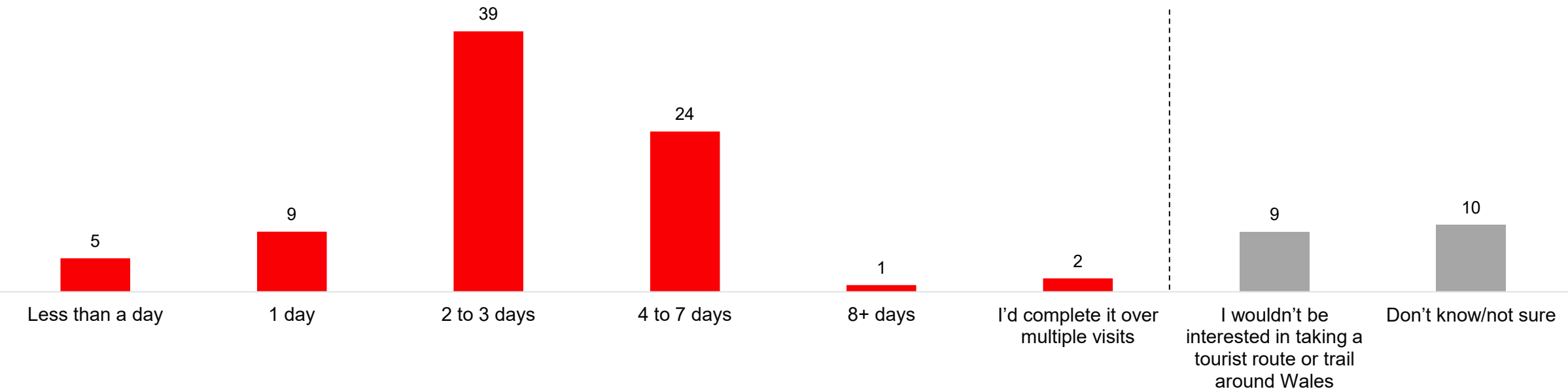
G4. And which, if any, of these types of long or short distance special interest trails would you be interested in following on a Wales holiday or short break in the next few years?
Base: Pre-nesters n=85; Families n=213; Older Independents n=227; Retirees n=74



Length of desired tourist route or trail around Wales

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

Figure 72. Length of desired route or trail, Percentage, All respondents



G5. How long would you be open to following a tourist route or trail around Wales?
Base: All respondents n=599

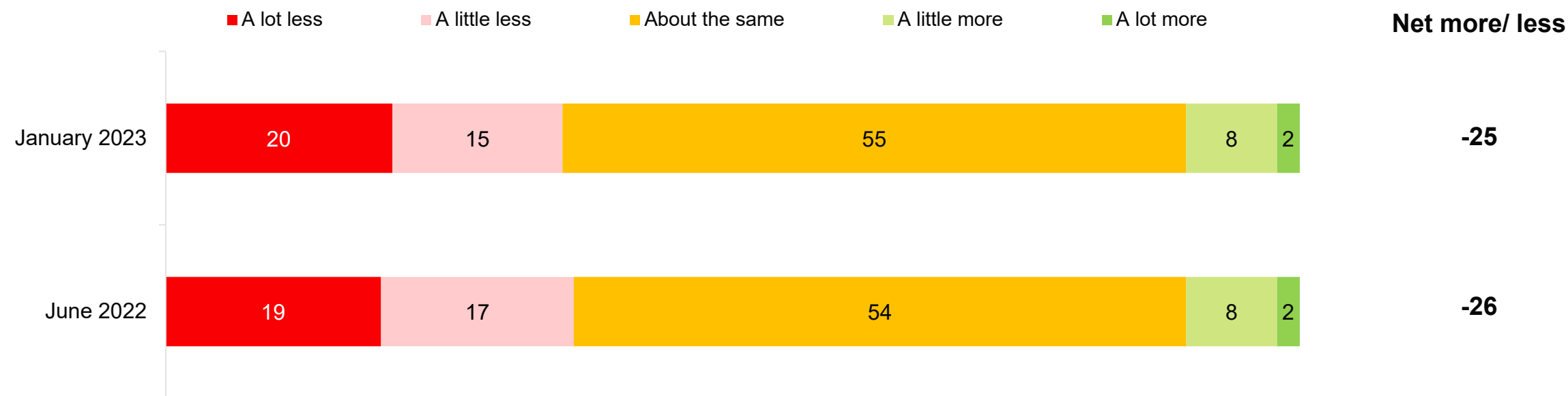
Marketing Impact



How much heard Wales talked about as a place to visit

- Overall, the majority of the Irish holiday market (55%) have heard ‘about the same’ level of Wales being talked about as a place to visit in last few months. However, a higher proportion claimed to have heard less than normal compared to more, so at a net level, people have heard Wales talked about less than normal (net -25) – consistent with when this was asked in June 2022. This is a measure of general exposure for Wales rather than specific marketing recall.

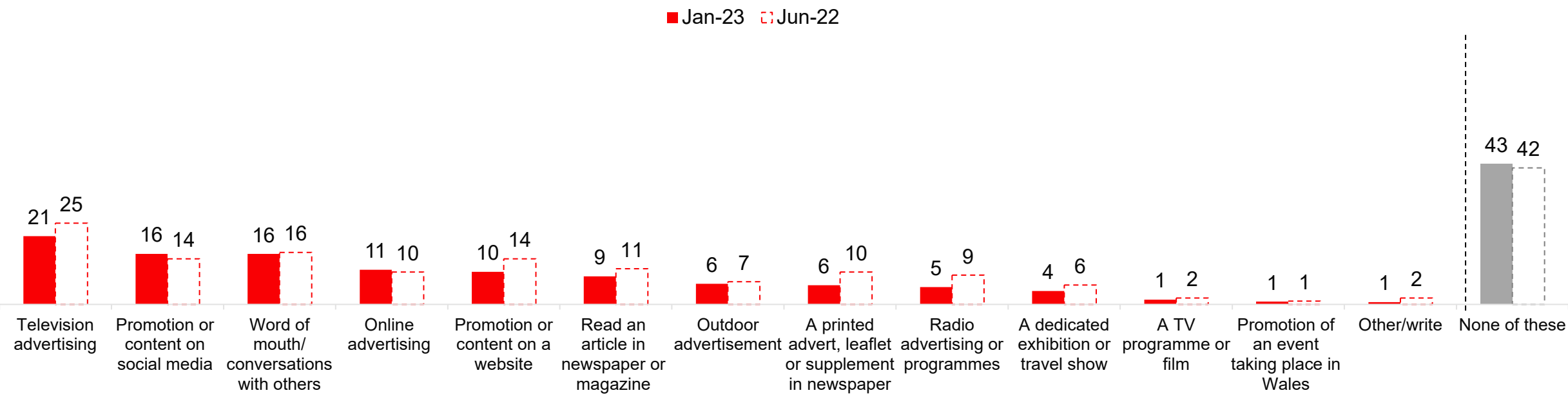
Figure 73. How much heard Wales talked about as a place to visit, Percentage, All respondents



Ways in which seen or heard about holidays in Wales

- Nearly 3 in 5 (57%) of the Irish holiday market have seen or heard about Wales holidays via at least one information source in the last few months. ‘Television advertising’ is the leading source, followed closely by ‘promotion or content on social media’.
- The proportion that had seen or heard about holidays in Wales in recent months – particularly on TV or social media - was higher amongst those that visited Wales in 2022 (89% having heard about Wales in at least one place) and those that probably/definitely intend to do so in 2023 (85% having done so).

Figure 74. Ways in which seen or heard about holidays in Wales in last few months, Percentage.



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

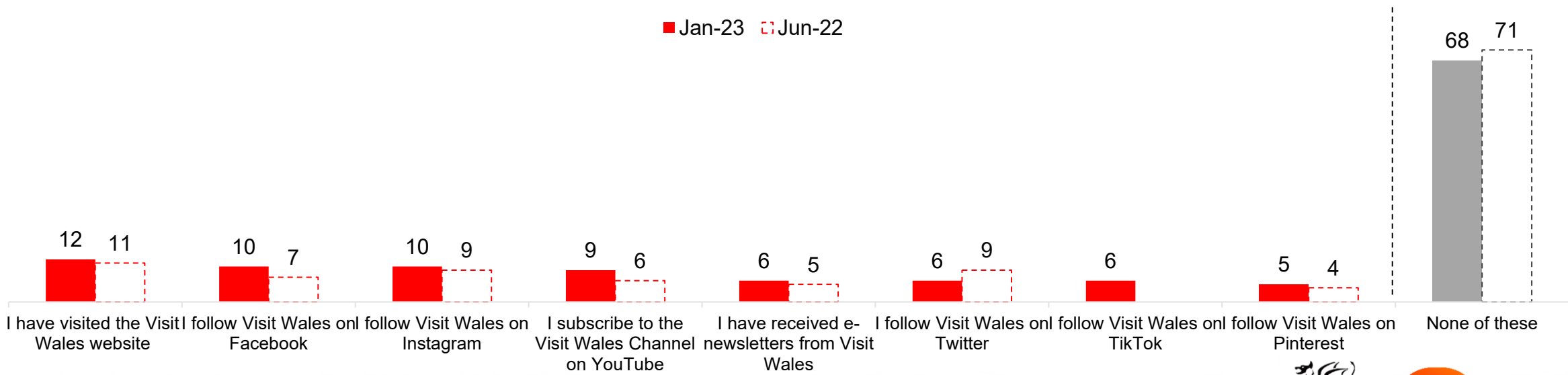
Base: All respondents n=599



Engagement with Visit Wales marketing and communications

- Around 3 in 10 (32%) of the Irish holiday market claim to have engaged with one of Visit Wales digital marketing channels in the last 12 months. ‘Visiting the Visit Wales website’, ‘following/liking the Visit Wales Facebook page’, ‘following Visit Wales on Instagram’ and ‘subscribing to the Visit Wales Channel on YouTube’ are the leading points of contact. Those that engaged with Visit Wales marketing and communication engaged with two touchpoints on average. Broadly, engagement with Visit Wales social media channels appears to have increased since June 2022.
- Notably, engagement with Visit Wales marketing is higher amongst those that visited Wales in 2022 (79% having engaged with at least one channel) and those that probably/definitely intend to do so in 2023 (67% having done so).

Figure 75. Engagement with Visit Wales marketing and communications, Percentage.



H8. More generally, which of the following apply to you and Visit Wales in the last 12 months?
Base: All respondents n=599



The Visit Wales Promotional Films tested within this survey

Autumn/Winter Adventurers



Autumn/Winter Families



Autumn/Winter Compilation



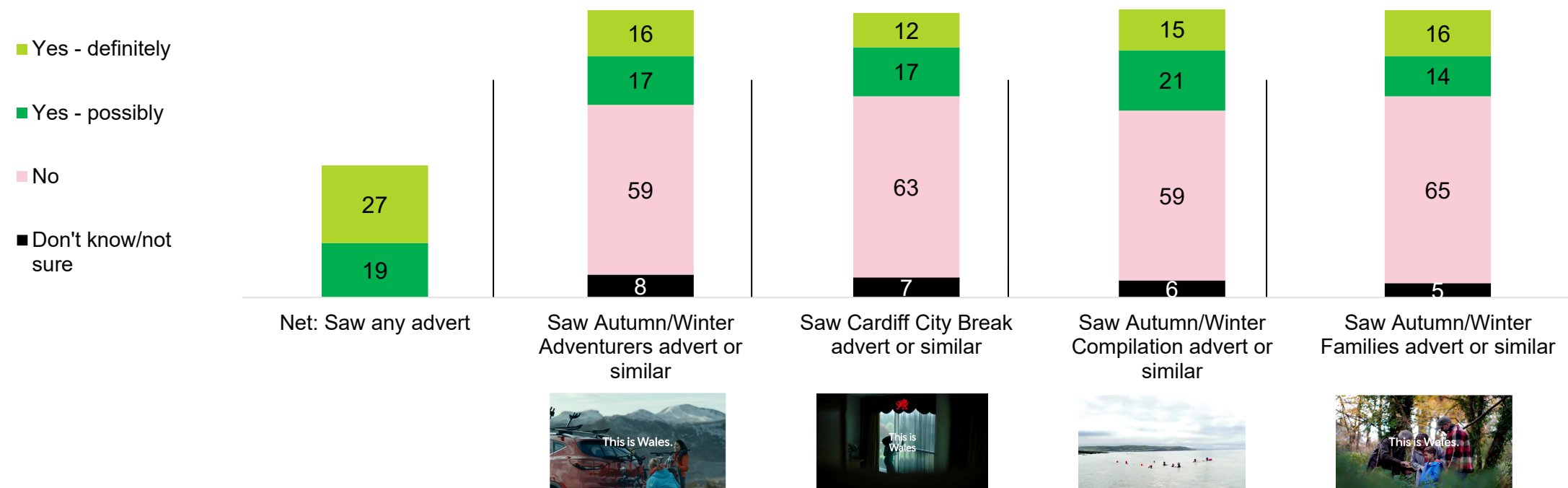
Cardiff City Break



Recall of Visit Wales promotional films

- In total, over 1 in 4 (27%) of the 'Irish holiday market' reported that they had definitely seen one of the Visit Wales promotional films in the last few months. Reported definite recall is lowest for the 'Cardiff City Break' advert at 12%, with a similar proportion 'definitely' recalling the other adverts tested. The 'Autumn/Winter Compilation' advert had the highest proportion stating they 'definitely/possibly' saw it. Generally, families were more likely to have seen all adverts.

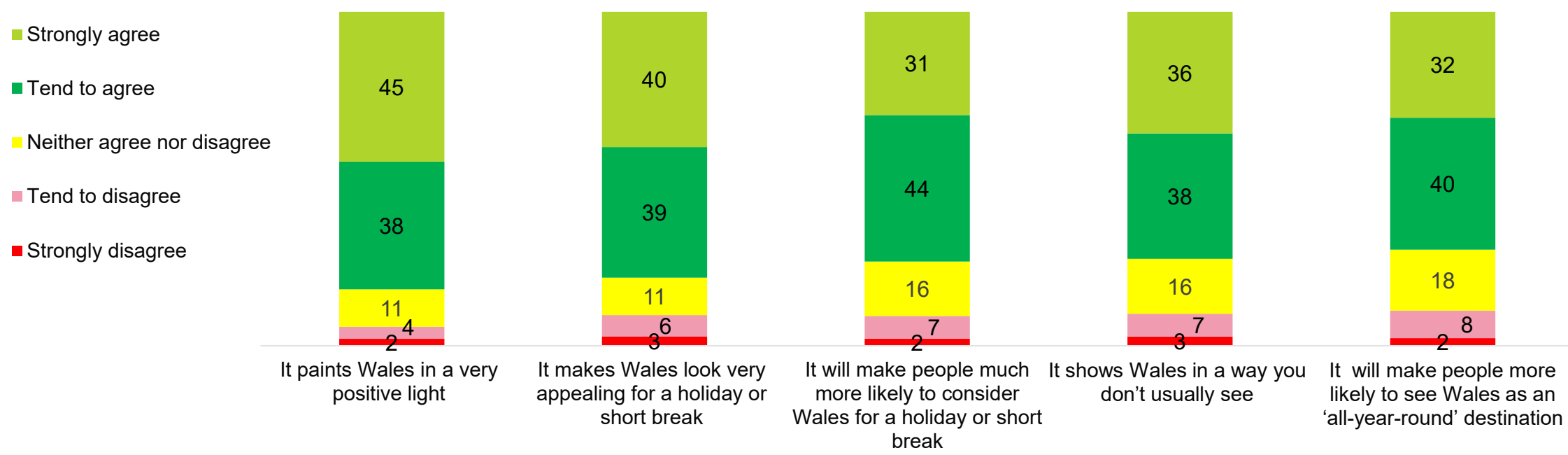
Figure 76. Recall of individual Visit Wales adverts, Percentage, By All respondents



Perceptions of promotional films overall

- Perceptions of the Promotional Films were broadly positive, a strong majority agreeing (and very few disagreeing) that they ‘paint Wales in a very positive light’ (83%), ‘make Wales look very appealing for a holiday or short break’ (79%), and ‘will make people more likely to consider Wales for a holiday or short break’ (75%). Similarly, there were positive impressions for ‘showing Wales in a way you don’t usually see’ and for ‘making people more likely to see Wales an ‘all-year-round’ destination’.
- Perceptions are generally more positive amongst those who intend to visit Wales than those that don’t intend to.

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



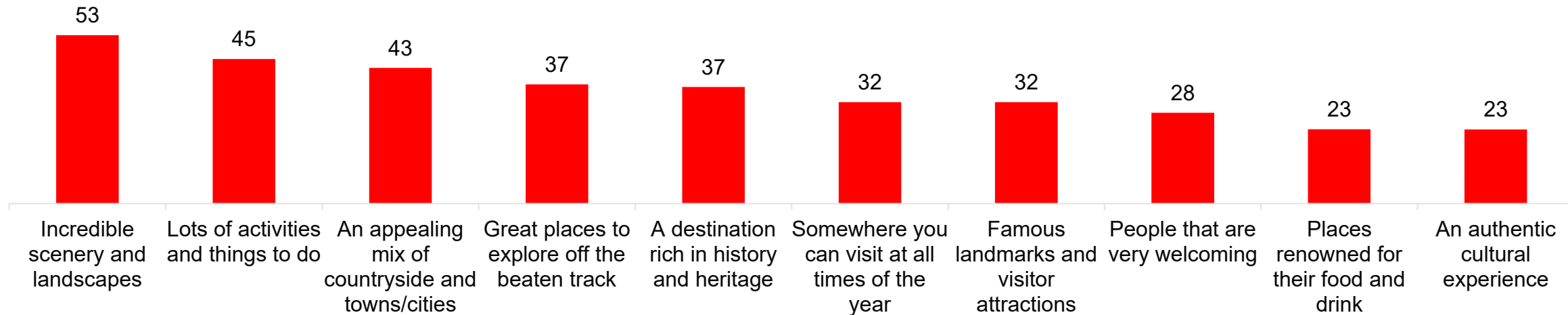
H5. Now thinking of the films we have just shown you as one whole marketing campaign, how much do you agree or disagree with the following statements?
Base: All respondents n=599



Descriptive statements that come out from the promotional films

- The adverts scored highly for communicating 'incredible scenery and landscapes' (53%), 'lots of activities and things to do' (45%) and 'an appealing mix of countryside and towns/cities' (43%). Respondents were also positive about the adverts in other ways – over a third stating they communicated 'great places to explore off the beaten track' and 'a destination rich in history and heritage'.

Figure 78. Descriptive statements that come out from TV advert, Percentage, Top 10, All respondents



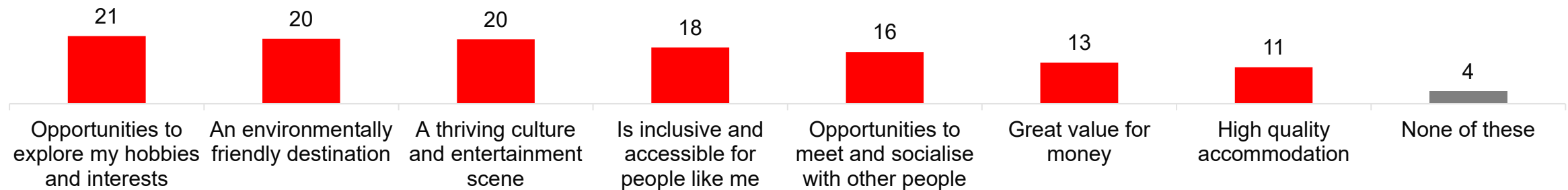
H6. Which, if any, of these descriptive statements about Wales would you say come across clearly from the adverts you have seen?

Base: All respondents n=599

Descriptive statements that come out from the promotional films

- The adverts scored lowest for communicating Wales as somewhere for 'high quality accommodation', 'great value for money' and as somewhere that provides 'opportunities to meet and socialise with other people'.

Figure 79. Descriptive statements that come out from TV advert, Percentage, Bottom 8, All respondents



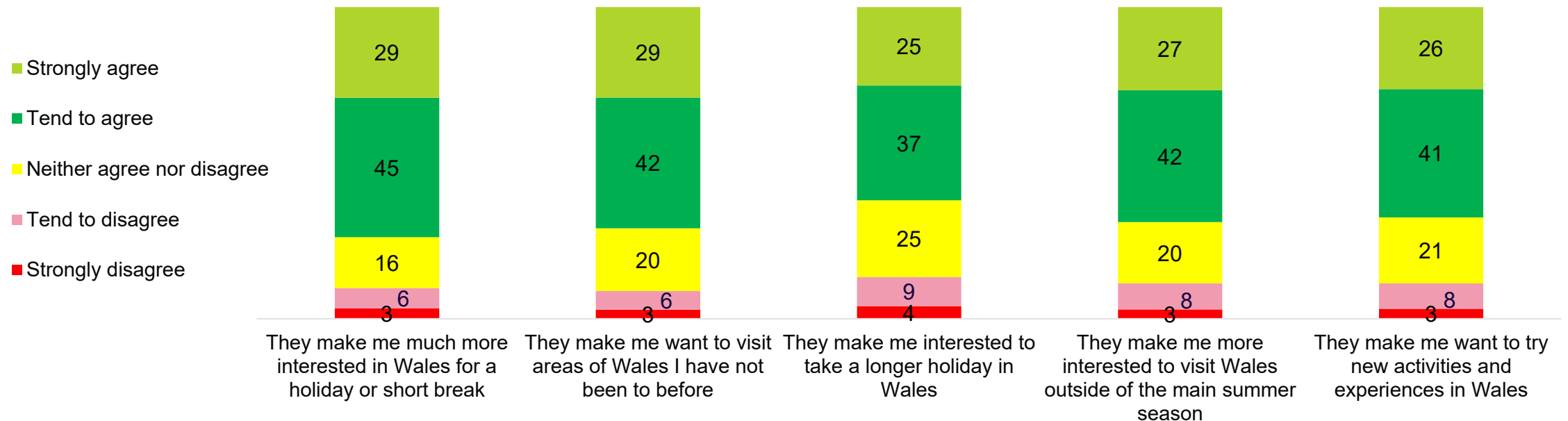
H6. Which, if any, of these descriptive statements about Wales would you say come across clearly from the adverts you have seen?

Base: All respondents n=599

Perceptions of Wales that come out from the promotional films

- Around 3 in 4 (74%) strongly/tend to agree that the promotional films make them 'much more interested in Wales for a holiday or short break'. The promotional films also generated a positive impression for other key strategic objectives to encourage visitors to visit all parts of Wales, to take longer holidays, to visit all year round and to try new activities and experiences.
- Notably, the proportion agreeing the adverts make them 'much more interested in Wales for a holiday/short break' is higher than average amongst those that 'have never been to Wales for a holiday or short break'.

Figure 80. Perceptions TV adverts overall, Percentage, All respondents



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

Base: All respondents n=599

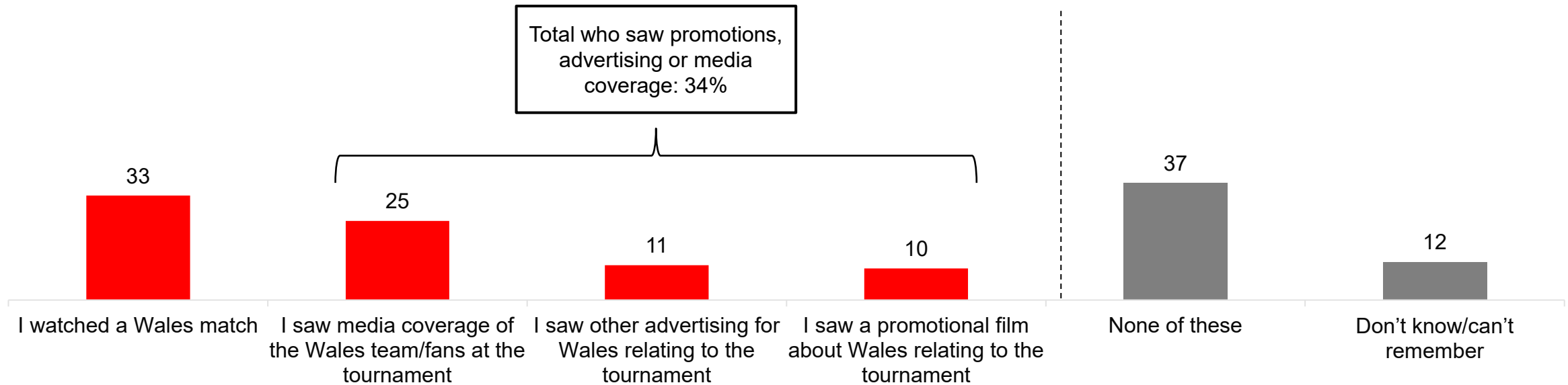
Promotion and awareness of Wales from Football World Cup (November 2022)



How much seen about Wales during the World Cup

- Half of the Irish holiday market saw at least some coverage of Wales during the Men's Football World Cup – 33% watched a Wales match and 34% saw some promotions, advertising or media coverage.

Figure 81. Wales promotions or coverage in the Men's Football World Cup, Percentage, All respondents



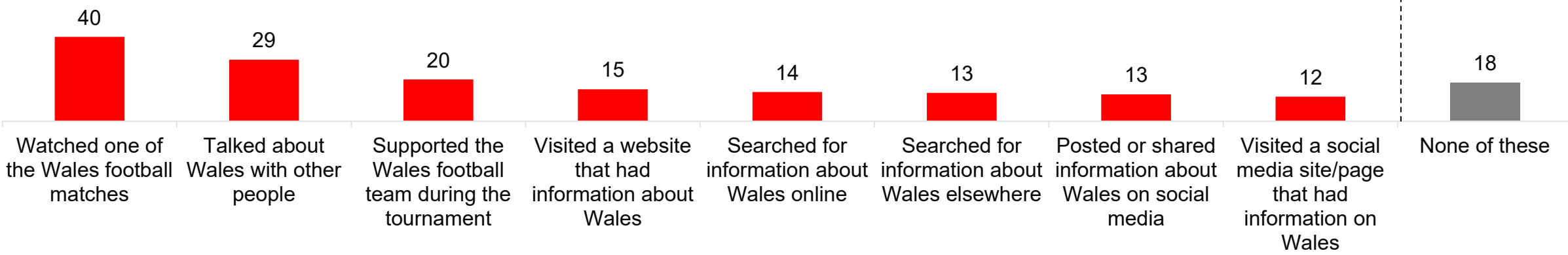
11. Which, if any, of the following did you see or do in relation to Wales in the Men's Football World Cup?

Base: All respondents n=599

Engagement with Wales during the World Cup

- In total 82% of respondents engaged with Wales at some level after seeing promotions or coverage of Wales during the World Cup. 40% watched one of the Wales football matches, 29% talked about Wales with other people, and 20% supported Wales. 15% of the Irish market with no personal connections to Wales ‘supported Wales’.

Figure 82. Engagement with Wales in the Men’s Football World Cup, Percentage, All respondents seen promotion or coverage of Wales in the World Cup



12. Which, if any, of the following did do as a result of seeing the promotions or coverage of Wales during the World Cup?
Base: All respondents that have seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup n=288



Perceptions of Wales during the World Cup

- Around half (49%) of respondents stated Wales' coverage and promotion in the World Cup made them more positive about Wales
- Families report the highest positive feelings with Wales at 61%, although this correlates strongly with their more positive perceptions of Wales generally.

Figure 83. Perceptions of Wales in the Men's Football World Cup, Percentage, All respondents seen promotion or coverage of Wales in the World Cup

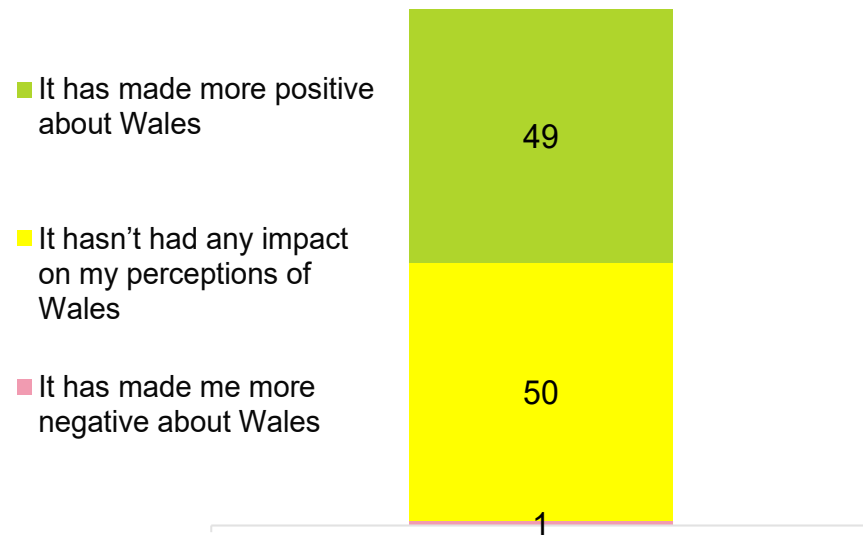
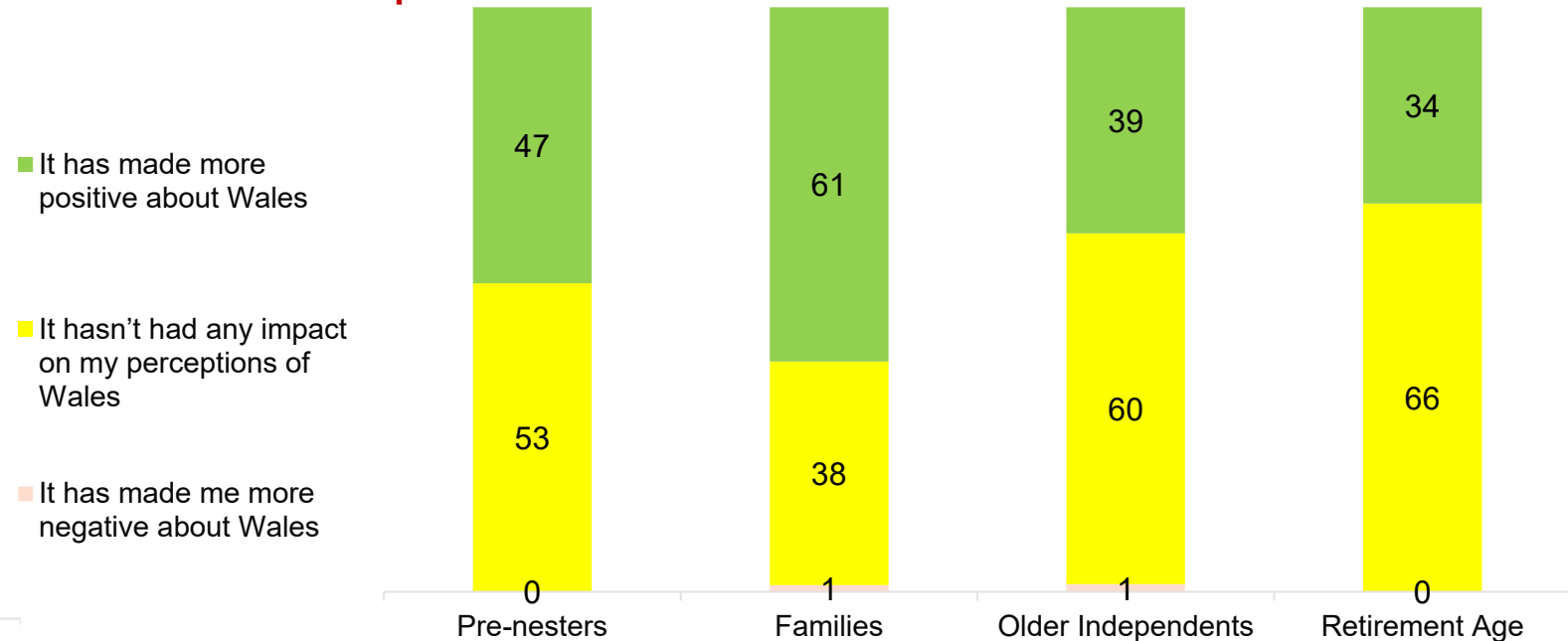


Figure 84. Perceptions of Wales in the Men's Football World Cup by LIFE STAGE, Percentage, All respondents seen promotion or coverage of Wales in the World Cup



13. How, if at all, has Wales' coverage and promotion in the World Cup impacted your perceptions of Wales?
 Base: All respondents that have seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup n=288 ; Pre-nesters n=35*; Families n=123; Older Independents n=109; Retirees n=21* *Low base sizes

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 (599)	+/- 1.7%	+/- 3.2%	+/- 4.0%
Wales 2022 trip-takers (96)	+/- 4.4%	+/- 8.0%	+/- 10.1%
Wales 2023 trip-intenders (199)	+/- 3.0%	+/- 5.6%	+/- 6.9%