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# Visit Wales consumer re-contact survey – UK and Ireland report (January 2023)

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Full Research Report: Visit Wales consumer re-contact survey – UK and Ireland report (January 2023)

Cardiff: Welsh Government, GSR report number 31/2023.

Available at: <https://www.gov.wales/visit-wales-consumer-re-contact-survey-19-january-3-february-2023>

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

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# Background and Methodology



# Background

As the Welsh Government's tourism team, Visit Wales is responsible for deploying tourism campaigns in the UK and internationally to promote Wales as a tourism destination.

This is a detailed report drawn from an online survey conducted in January 2023 amongst Visit Wales consumer contacts from the UK and Ireland (referred to as 'enquirers' throughout the report). Separate reports are available for German and US enquirers. Consumer contacts are defined as people who engaged with Visit Wales or partner communications, and provided their contact details to Visit Wales in 2022. The specific research objectives were to evaluate:

## Trips taken in 2022

- Enquirers' relationship with Wales
- The proportion of enquirers who visited Wales in 2022 for a short break or holiday
- The characteristics of trips taken in Wales and the profile of visitors taking holidays
- The overall experience in Wales and ratings for elements of trips

## Marketing impact

- Engagement with Visit Wales communications
- The perceived influence of Visit Wales communication on trip decisions
- The perceived impact of Visit Wales marketing

## Trips intentions for 2023

- The proportion of enquirers planning a trip to Wales in 2023
- Anticipated trip characteristics for Wales trips in 2023

# Methodology, sample and response rate

## Methodology

Enquirers were contacted by Visit Wales via email in January 2023 and asked to complete a 10 minute online survey available in English and Welsh. Reminder invites were sent out to non-openers, and a prize draw incentive was also offered. Participants were given 16 days within which to complete the survey – the survey opening on 19<sup>th</sup> January and closing on 3<sup>rd</sup> February.

## Sample and response rate

The sample was derived from a number of different sources, reflective of how enquirers had been in contact with Visit Wales.

The table below outlines the sample sources and number of available contacts by sample source and at a total level – see next page for more information on these sources.

Sample source	Sample sizes
Website	5,669
Third party promotion	11,153
Social media	640
Lead generation	6,960
e-CRM	20,934
<b>TOTAL SAMPLE</b>	<b>45,536</b>

From 45,536 invites sent to enquirers, 5,381 completed survey responses were received, **delivering an overall response rate of 12%.**

# An explanation of sample sources

## VW Website

A sample of users of the [www.visitwales.com](http://www.visitwales.com) website who completed a short intercept survey across the full calendar year 2022 and who were living in the UK and Ireland.

## Third Party Promotion

A sample of users who entered a prize draw promoted on a third party website during the calendar year 2022 and who were living in the UK and Ireland. This includes promotions with Secret Escapes (March & June-July), BBC Countryfile (Sept-Oct), Coast Magazine (Sept-Nov), WWE (April-June) and St David's Day Prize draw (March).

## Social Media

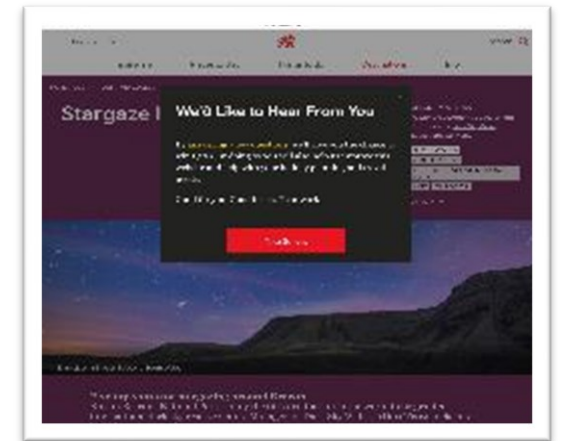
A sample of users of VW's Facebook and Instagram channels who completed a short intercept survey across the full calendar year 2022 and who were living in the UK and Ireland.

## Lead Generation

A sample of new users who entered a prize draw from a digital ad on Facebook or Instagram in the calendar year 2022 and who were living in the UK and Ireland.

## e-CRM

A sample of VW newsletter subscribers who were sent and actively engaged with Visit Wales newsletters during the calendar year 2022 and who were living in the UK and Ireland.



# Sample considerations/1

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

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



# Sample considerations/2

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

- 2023 research respondents:** Respondent proportions from this research study
- 2022 research respondents:** Respondent proportions from the equivalent survey conducted in January 2022.
- UK Holiday Market breakdown:** The breakdown of the UK overnight trip market as of January 2023.

**Table 1. Relationship with Wales**

Relationship with Wales	2023 research respondents (this report)	2022 research respondents	UK holiday market breakdown*
I often take short breaks or holidays there and intend to do so again within the next year	47%	47%	15%
I sometimes take short breaks or holidays there and intend to do so again in the next couple of years	30%	31%	16%
I have taken a short break or holiday there once or twice before and might do so again	18%	19%	27%
I have never been on a holiday or short break there but would like to	4%	3%	16%
I have taken a short break or holiday there before, but am unlikely to do so again	1%	1%	7%
I have never taken a short break or holiday there before and am not likely to in the future	<1%	<1%	11%
I don't know	<1%	<1%	8%

\*Market breakdown is based on research conducted amongst a nationally representative sample of UK trip-takers in January 2023



# Sample considerations/3

Table 2. Region of origin

Region of residence profile	2023 research respondents (this report)	2022 research respondents	UK holiday market breakdown*
North West of England	17%	17%	11%
South East England	14%	15%	14%
West Midlands	17%	15%	9%
London	5%	10%	13%
South West of England	12%	10%	8%
East Midlands	8%	8%	7%
Yorkshire and The Humber	7%	7%	8%
East of England	6%	7%	9%
North East of England	2%	2%	4%
Scotland	2%	4%	8%
Wales	6%	3%	5%
Northern Ireland	<1%	1%	1%
Other	4%	1%	1%

\*Market breakdown is based on research conducted amongst a nationally representative sample of UK trip-takers in January 2023

# Sample considerations/4

Table 3. Age profile

Age profile	2023 research respondents (this report)	2022 research respondents	UK holiday market breakdown*
16-34	11%	3%	26%
35-54	23%	26%	41%
55-64	29%	33%	9%
65+	37%	38%	23%

\*Market breakdown is based on research conducted amongst a nationally representative sample of UK trip-takers in January 2023



# Definitions used within this report (1)

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

- **Visit Wales enquirers:** The total survey population - Visit Wales consumer contacts used for this survey.
- **2022 Wales trip-takers:** Visit Wales enquirers that stated within the survey that they took a short break or holiday in Wales in 2022
- **Non-visitors to Wales:** Visit Wales enquirers that stated within the survey that they did not take a short break or holiday in Wales in 2022
- **2023 Wales trip intenders:** Visit Wales enquirers that stated within the survey that they intend to take a short break or holiday in Wales in 2023

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

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

# Definitions used 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**

# Key findings



# Key findings (1)

## Profile of Visit Wales Enquirers

1. Visit Wales enquirers tend to belong to 'older' life stages, with older independents making up over 2 in 5, and enquirers of retirement age nearly 2 in 5. A higher proportion of social media enquirers are pre-nesters and families.
2. Almost half of enquirers belong to social grades AB, a further 1 in 4 to social grades C1, suggesting a high disposable income for most enquirers. Only 3 in 10 belong to lower social grades C2DE.
3. Enquirers are spread across the UK, but there is a clear bias towards regions in relatively close proximity to Wales, with the North West of England and West Midlands having the highest representation. Wales residents have relatively low representation, perhaps reflecting their existing familiarity with Wales as a trip destination (and therefore having less need to sign up to Visit Wales communications).

## 2022 trip conversion and relationship with Wales

1. Almost all (96%) Visit Wales enquirers have been to Wales for a short break or holiday at some point in their lives, with around half (47%) 'often taking short breaks or holidays there and planning to do so again in the next year', and a further 3 in 10 (30%) 'sometimes taking short breaks or holidays there and intending to do so in the next couple of years'.
2. 3 in 5 Visit Wales enquirers took a holiday or short break in Wales in 2022. Wales trip-takers took 3.2 trips to Wales on average.
3. The rate of trip conversion varied by sample source – website and social media enquirers had the highest rate of conversion, and third party promotion enquirers the lowest. All life stages reported similarly strong trip-taking behaviour but – aligned with the enquirer population – retirees and older independents have by far the strongest representation. Aligned with previous research amongst enquirers – and the wider UK holiday market – trip conversion correlates strongly with region of residence, with enquirers from Wales, the West Midlands and the North West of England being the most likely to convert to taking a trip.
4. The vast majority of Wales enquirers that took a holiday or short break in Wales in 2022 were on a repeat visit, but a small proportion (2%) were visiting for the first-time. Around a third of enquirers have visited previously but did not visit in 2022.

# Key findings (2)

## 2022 trip characteristics

1. Wales trip-takers were most likely to have taken their Wales trip in September. With the exception of the winter months (January to February and November to December), there was a relatively even spread of visits across the year. That said, there was some variation by life stage – retirees and older independents driving trips in September, and August unsurprisingly strongest amongst families.
2. On average Wales trip-takers stayed in Wales for 4.5 nights, with an even split between short breaks of 1-3 nights and longer breaks of 4+ nights. The average trip length increases in the summer months and falls in the winter months. Retirees tend to take the longest breaks, and pre-nesters the shortest.
3. 16% of visitors to Wales had children in their party – unsurprisingly highest amongst the family life stage and in the peak summer months. 21% stayed in Wales with pets, rising to 25% amongst older independents.
4. Beyond ‘wanting to visit again’, trip-takers were most likely to be motivated to visit Wales by the opportunity ‘to get away from it all and have a rest’ and ‘to connect with nature/be outdoors’ – the latter particularly high amongst families. A broad range of other reasons were provided – ‘culture and heritage’ was a driver for 1 in 4 and ‘adventure or an active holiday’ mentioned by 1 in 7.
5. ‘Hotel/motel/inn’ was the leading accommodation type for Wales 2022 trip-takers (at 28%), followed by ‘rented house/cottage/ lodge or similar’ (at 25%). A range of other accommodation types were also chosen, including ‘friends’ or relatives home’ (13%) and ‘guest house/B&B’ (10%).
6. Over half of Wales trip-takers booked their accommodation ‘directly with an accommodation provider’, reported by more than three times as many as those who reported booking via a ‘travel website’, and highest for all life stages, although particularly so for retirees. Around 1 in 6 trip-takers stated they found their accommodation on the Visit Wales website – consistently high across all sample sources.
7. The majority of Wales overnight visitors stayed in one location, although a notable minority (12%) stayed in more than one location. North Wales was the region of Wales attracting the highest number of overnight visits (half staying there), driven by ‘Snowdonia mountains and coast’ which was by far the most stayed in destination in Wales, at 27%. South West Wales generated overnight stays from 1 in 5 (27%), driven by Pembrokeshire. Wales destination is driven in part by proximity to place of residence – visitors from the North West of England, for example, were most likely to stay in North Wales.



## Key findings (3)

8. 'Walking, hiking or rambling' was by far the most popular activity for trip-takers on their 2022 trip, followed by 'trying local food and drink', 'exploring scenic areas by car', 'visiting outdoor attractions' and 'visiting heritage sites or culture attractions' – all conducted by more than 2 in 5 visitors. Although the overall patterns are similar, there are some differences by life stage. Families were the most likely to engage in 'water sports' (23%) and to visit 'family attractions (29%) – retirees conversely were lowest on both. Older independents indexed particularly high on 'walking, hiking or rambling' (65%). Pre-nesters were largely in line with average although were the least likely to 'explore scenic areas by car'.
9. Nearly 4 in 5 Wales overnight visitors rated their experience in Wales as 'excellent' (9-10 out of 10), a notable rise on 2021 ratings. 2 in 10 rated the visit as 'good' and only 1 in 100 as 'poor'. Ratings were similarly high across all life stages, although first time visitors were marginally more likely to give a lower score.
10. When assessing individual elements of the trip, Wales trip-takers were very satisfied with a wide range of areas. They were the most satisfied with the 'quality of the natural environment' in Wales (83% very satisfied), followed by 'feeling of safety' (80%), 'cleanliness of beaches' (77%), 'the welcome you received' (76%) and 'places to visit (75%)'. Ratings of the Wales visit experience were lowest for 'the availability of public transport' (28% 'not very satisfied), 'the availability of public toilets' (27%) and 'the cost of car parking' (also 27%). 'The quality of public transport' also received low ratings, as did 'accessibility for people with a disability'.

# Key findings (4)

## Marketing Impact

1. Although Wales trip-takers were most likely to have seen or heard about Wales through word of mouth, there was also strong engagement through a range of other channels. Promotion of Wales on a website, social media, articles in a newspaper, online and television advertising were all seen or heard by at least 1 in 5 Wales visitors.
2. In terms of specific Visit Wales communications, engagement is highest with Visit Wales e-newsletters and the Visit Wales website, with two thirds reporting engaging with each. Around 3 in 10 reported engaging with social media.
3. Visit Wales communications may have had an impact on the decision to visit Wales in 2022. Nearly 1 in 4 Wales visitors stated that Visit Wales communications influenced their decision to take their holiday or short break to Wales, and just under 1 in 4 trip-takers reported that they were undecided on whether they would visit Wales at the end of 2021.
4. Enquirers reported that Visit Wales communications impacted their trips to Wales in a number of ways. The main reported changes to trips taken to Wales as a result of Visit Wales communications were making visits outside the summer season, visiting new places and visiting more places than originally planned.
5. Communications also appears to have impacted future trips. Around 1 in 4 Wales **2023** trip intenders indicate that Visit Wales communications have already had an influence on their decision to take their 2023 trip – almost identical to the influence communications had on 2022 trips. There are minimal differences by sample source.

## Reasons for not taking trips to Wales in 2022

1. Of the enquirers that did not visit Wales in 2021, around half (46%) were considering going there, highest amongst families (56%) and lowest amongst pre-nesters and retirees (both 42%). Nearly half (47%) of non-visitors to Wales in 2022 'went somewhere else in the British Isles or Ireland instead', highest amongst families. Just under 1 in 4 'went somewhere else abroad', and nearly 2 in 5 (39%) 'did not take a holiday at all'.
2. 'Personal circumstances' was the most common reason given for not visiting Wales in 2022, mentioned by more than twice as many people as the next most popular reasons - 'I was still nervous about travelling due to COVID' and 'my general health' (both highest amongst retirees).

# Key findings (5)

## Intention to take a trip in Wales in 2023

1. Over half (51%) of Visit Wales enquirers have either *already* booked a Wales trip in 2023, or are definitely going but have not yet booked, rising to 66% amongst 2022 trip-takers. Notably, 1 in 4 (26%) of those that did not take a Wales holiday or short break in 2022 have already booked a Wales trip or are definitely planning on taking one in 2023.
2. Similar to 2022, Wales 2023 enquirers are most likely to take their trip in September, followed by May and June. There is relatively strong interest in all months with the exception of January to February and November to December.
3. The most popular Wales destination for a 2023 trip is Snowdonia, followed by Pembrokeshire and the Isle of Anglesey.
4. Similar to trips taken in 2022, preferred destinations correlate with region of residence – enquirers from the North West of England are most likely to show a preference for North Wales destinations, with enquirers from the South West of England and Wales more likely to plan on staying in South or West Wales.

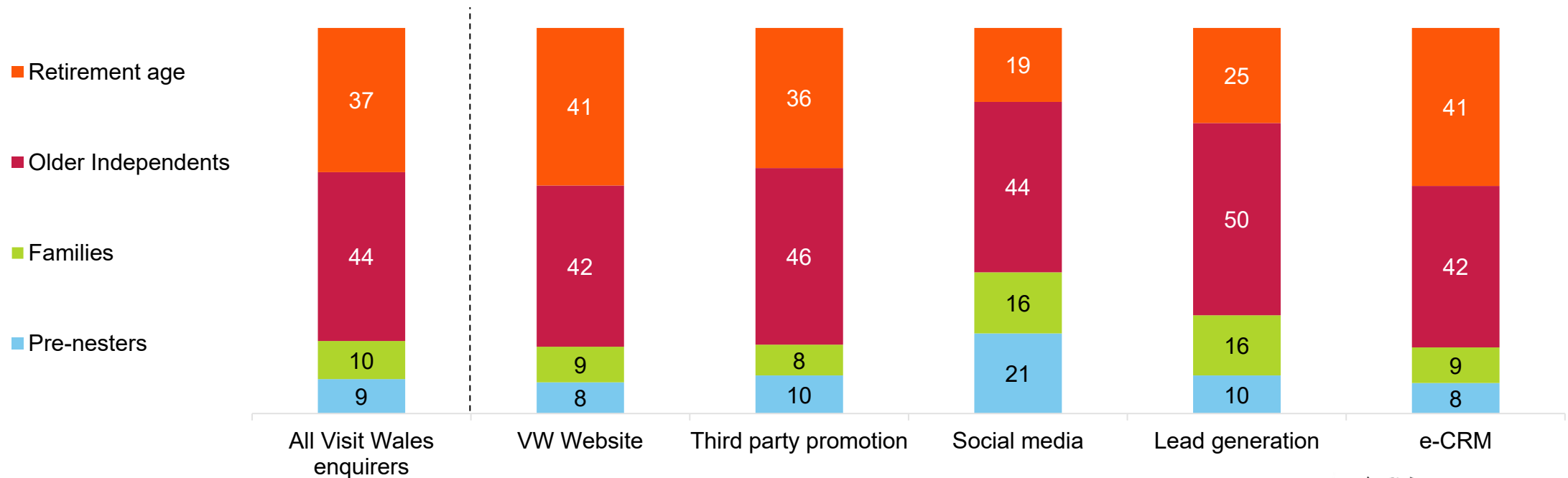
# Profile of Visit Wales Enquirers



# Life stage of enquirers

- The vast majority of enquirers are made up of older independents (44%) and retirees (37%), with families and pre-nesters each making up around 1 in 10.
- Although every sample source has higher proportions of 'older' age profiles than 'younger' ones, there is some variation. 1 in 5 (21%) of social media enquirers are pre-nesters – just over double the overall average – and approximately 1 in 6 are families, with lead generation also featuring higher proportions of these life stages. Visit Wales website, third party promotion and e-CRM enquirers are the most in line with the overall average.

**Figure 1. Life stage of enquirers, Percentage, All Enquirers**



Demographics questions

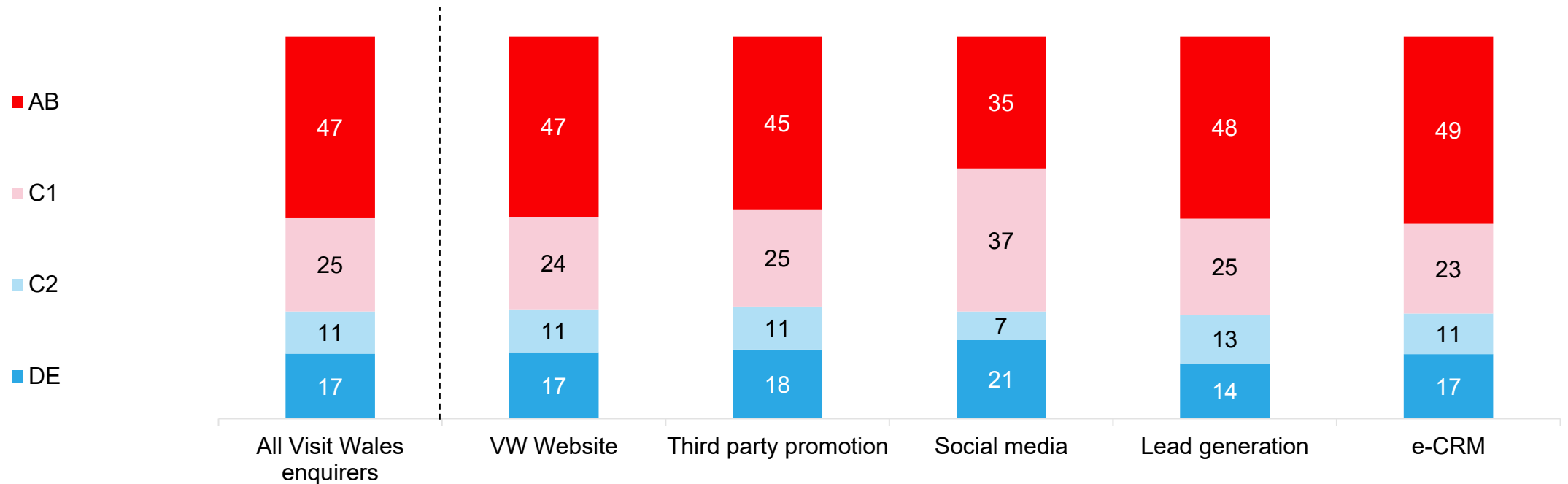
Base: All Visit Wales enquirers excluding 'prefer not to say' n=5,284; VW Website n=958; Third party promotion n=1,079; Social media n=120; Lead generation n=678; e-CRM n=2,449



# Social grade of enquirers

- Nearly half (47%) of all Visit Wales enquirers belong to high social grades AB, with a further 1 in 4 (25%) falling into social grade C1. Lower social grades C2DE make up a minority of enquirers.
- All sample sources are dominated by social grades ABC1, although social media enquirers have a higher proportion of social grades C1 than other sample sources.

Figure 2. Social grade of enquirers, Percentage, All Enquirers



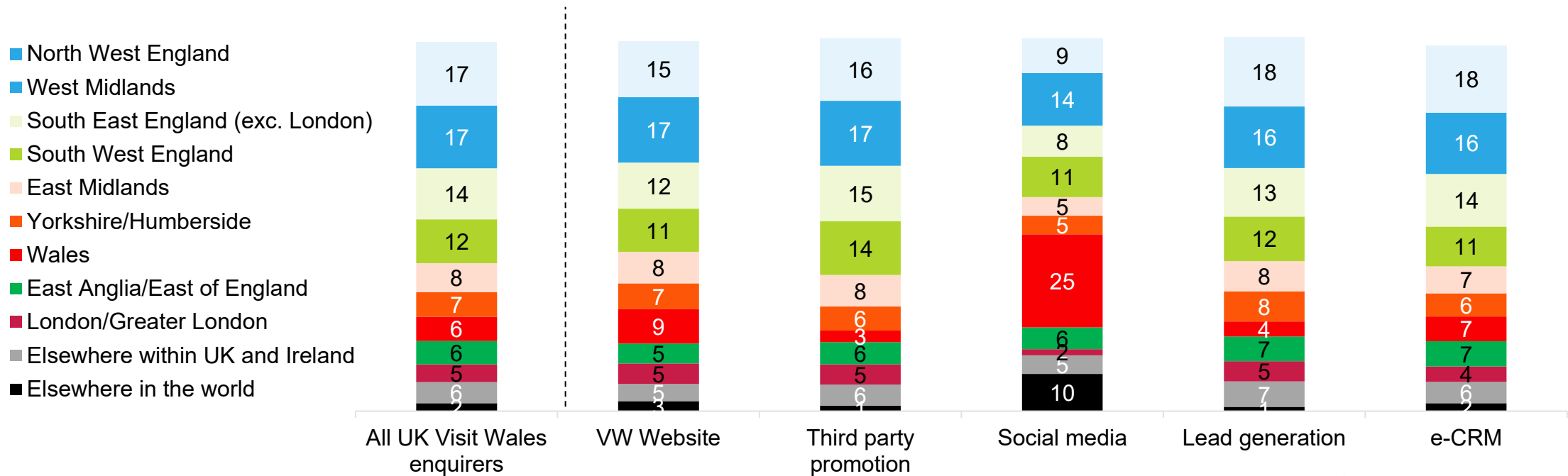
X4a. Which one of these best describes the occupation of the main income earner in your household?

Base: All Visit Wales enquirers n=4,782; VW Website n=860; Third party promotion n=979; Social media n=107; Lead generation n=629; e-CRM n=2,207

# Region of residence amongst enquirers

- The origin of Visit Wales enquirers correlates with proximity to Wales, with the North West of England and the West Midlands being the most strongly represented, and making up a third of enquirers between them. Wales residents make up just 6% of enquirers.
- The balance of enquirer origin is relatively even across sample sources, with the exception of social media enquirers, of whom 1 in 4 live in Wales and 1 in 10 live outside of the UK and Ireland – both above average.

**Figure 3. Detailed origin of enquirers, Percentage, All UK enquirers**



UK-X3c: Where in the UK do you live?

Base: All UK Visit Wales enquirers n= 5,169; VW Website n=935; Third party promotion n=1,079; Social media n=108;

Lead generation n=672; e-CRM n=2,375



# 2022 trip conversion and relationship with Wales



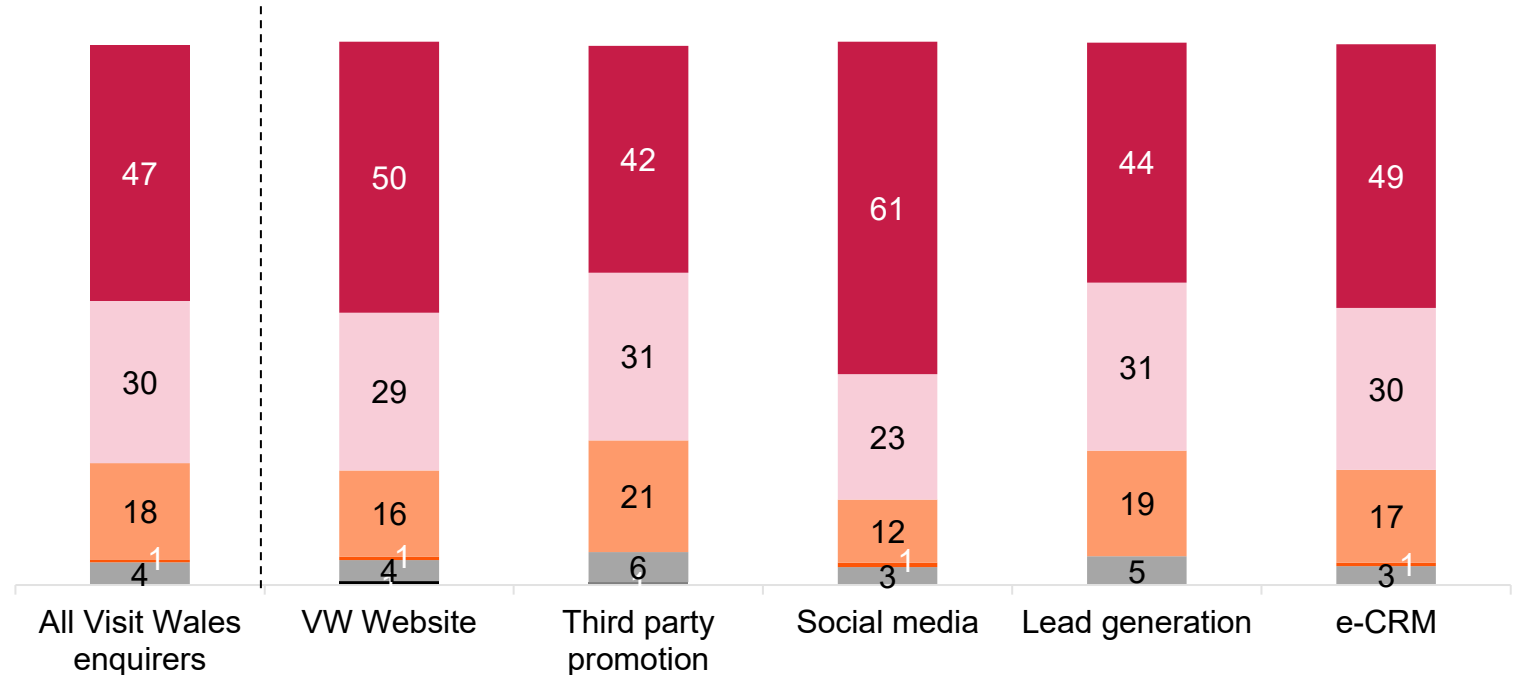


# Loyalty of visitation to Wales

- Overall, nearly half (47%) of Visit Wales enquirers stated that they 'often take short breaks or holidays' in Wales and 'intend to do so again within the next year', with a further 3 in 10 (30%) 'sometimes' taking short break or holidays there and intending to do so within the next couple of years. Only a small minority have 'never' visited Wales for a holiday or short break.
- Social media enquirers are the most likely to 'often take short breaks or holidays in Wales' (at 61%). Other sample sources report relatively similar loyalty to Wales, although 'third party promotion' reports the lowest incidence of 'often taking short breaks or holidays there' (at 42%).

**Figure 4. Relationship with Wales, Percentage, All Enquirers**

- I often take short breaks or holidays there and intend to do so again within the next year
- I sometimes take short breaks or holidays there and intend to do so again in the next couple of years
- I have taken a short break or holiday there once or twice before and might do so again
- I have taken a short break or holiday there before, but am unlikely to do so again
- I have never been on a short break or holiday 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



A1. Which of the following statements best applies to you when it comes to visiting Wales?

Base: All Visit Wales enquirers n=5,381; VW Website n=976; Third party promotion n=1,105; Social media n=121;

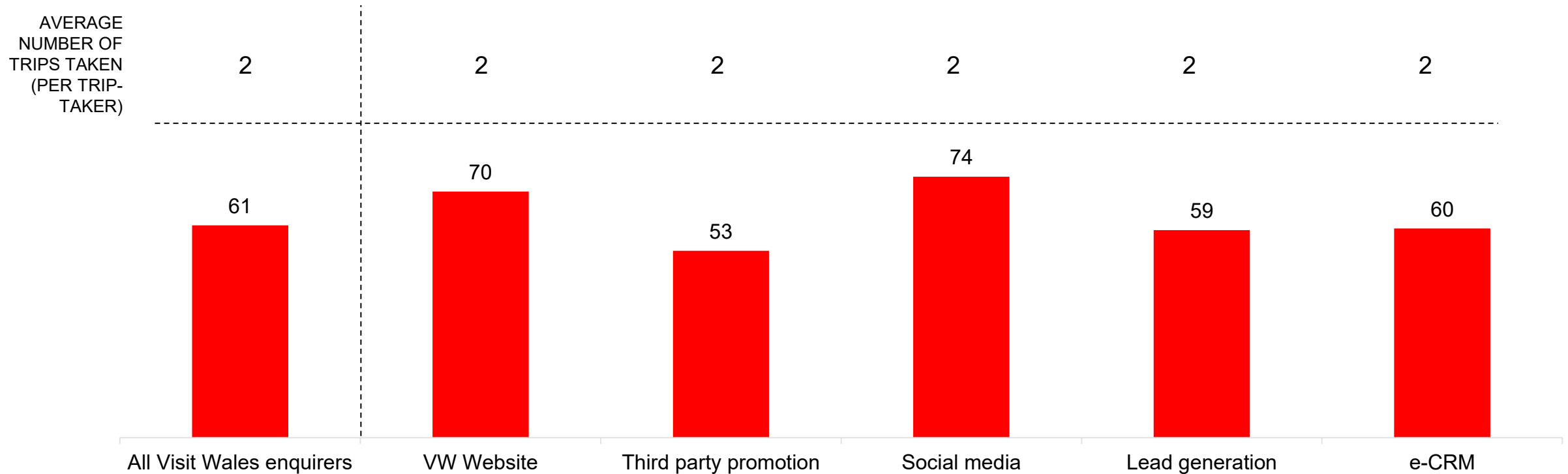
Lead generation n=683; e-CRM n=2,496



# Whether took a short break or holiday in Wales in 2022

- 3 in 5 (61%) of Visit Wales enquirers state that they took a holiday or short break in Wales in 2022, with some variation across sample sources. Website and social media enquirers were the most likely to have taken an overnight Wales trip, with third party promotion enquirers the least likely to. Lead generation and e-CRM were in line with the overall average.
- On average, Visit Wales trip-takers took 2 Wales trips in 2022.

**Figure 5. Whether took a short break or holiday in Wales in 2022, Average and Percentage, All Enquirers**



A2a.Did you take a holiday or a short break in Wales in 2022? UKI-A3. How many holidays or short breaks did you take in Wales in 2022?

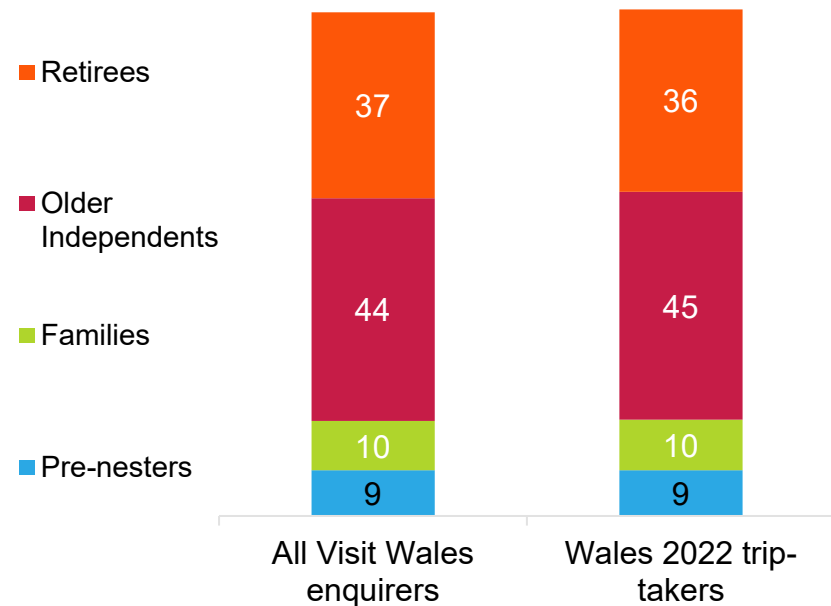
Base: All Visit Wales enquirers n=5,381; VW Website n=976; Third party promotion n=1,105; Social media n=121; Lead generation n=683; e-CRM n=2,496 Average figure here refers to median average



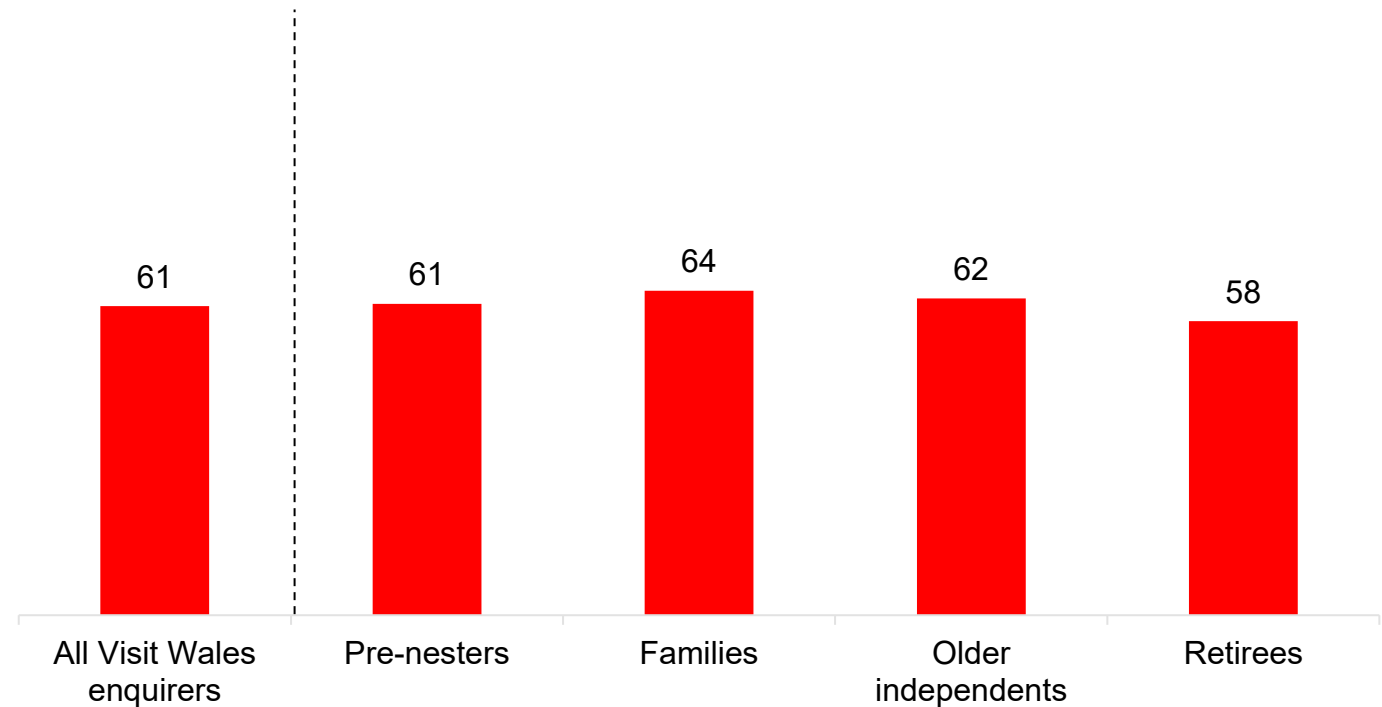
# Whether took a short break or holiday in Wales in 2022

- The life stage breakdown of Wales overnight trip-takers mirrors the wider enquirer population – retirees and older independents making up the vast majority.
- When looking at each life stage separately, there is minimal variation in trip conversion, although families are the most likely to have done so – at 64%.

**Figure 6. Breakdown of Wales 2022 trip-takers by life stage, Percentage.**



**Figure 7. Whether took a short break or holiday in Wales in 2022, Average and Percentage, By life stage**

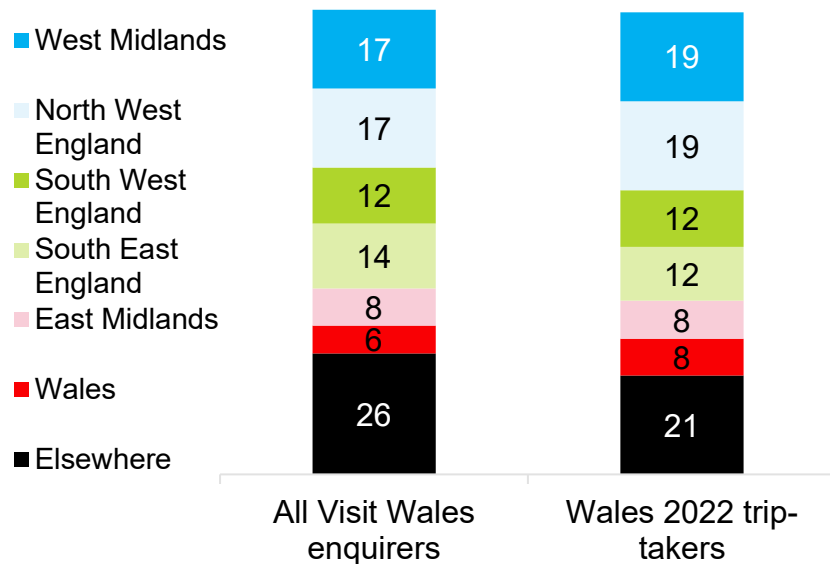


A2a. Did you take a holiday or a short break in Wales in 2022 UKI-A3. How many holidays or short breaks did you take in Wales in 2022? Base: Pre-nesters n=472; Families n=524; Older Independents n=2,312; Retirees n=1,976. All 2022 Wales trip-takers n=3,256; All enquirers n=5,381

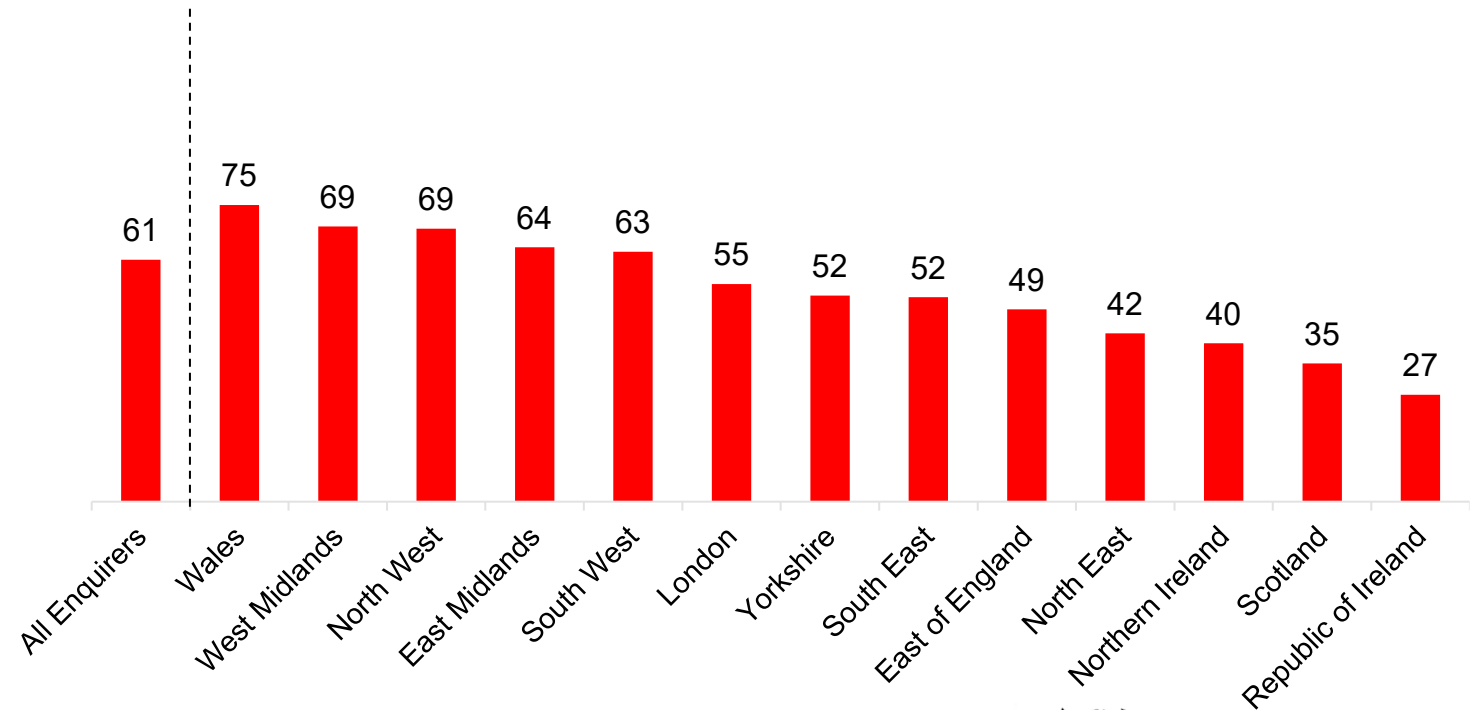
# Whether took a short break or holiday in Wales in 2022

- The make up of Wales overnight trip-takers in 2022 correlates strongly with proximity to Wales – residents of the West Midlands, the North West of England and the South West of England make up half of Wales 2022 overnight trip-takers, and also exhibit higher conversion rates as a proportion of enquirers. Despite strong conversion, due to their small numbers within the enquirer population, Wales residents only make up a small proportion of trip-takers. Conversely, residents of the South East of England report lower than average conversion but have the 4<sup>th</sup> highest representation as a proportion of trip-takers.

**Figure 8. Breakdown of Wales 2022 trip-takers by region of residence, Percentage.**



**Figure 9. Whether took a short break or holiday in Wales in 2022, Average and Percentage, By region of residence**



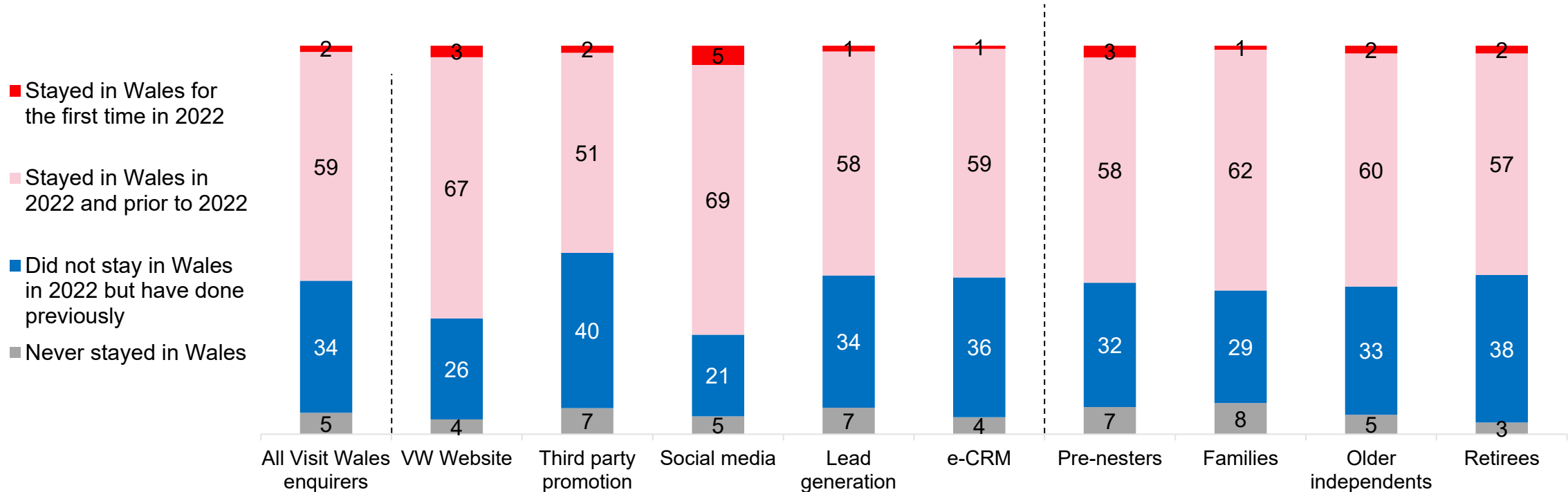
A2a. Did you take a holiday or a short break in Wales in 2022? UKI-A3. How many holidays or short breaks did you take in Wales in 2022? Base: Wales n=345; West Midlands n=899; North West n=2886; South West n=628; East Midlands n=416; London n=255; East of England n=336; South East n=731; Yorkshire and The Humber n=352; North East n=113; Scotland n=132; Northern Ireland n=25. All 2022 Wales trip-takers n=3,154; All UK enquirers n=5,169



# When taken holidays or short breaks in Wales

- Nearly 3 in 5 (59%) of Visit Wales enquirers took a holiday or short break in Wales in 2022 and prior to 2022 – consistent across life stages, and highest amongst social media and Visit Wales website enquirers. A third (34%) of enquirers did not stay in Wales in 2022 but had done previously – highest amongst third party promotion enquirers. Only 2% were visiting Wales for the first time in 2022, although this rises to 5% amongst social media enquirers.

**Figure 10. When taken holidays or short breaks in Wales, Percentage, All Enquirers, By sample source and life stage**

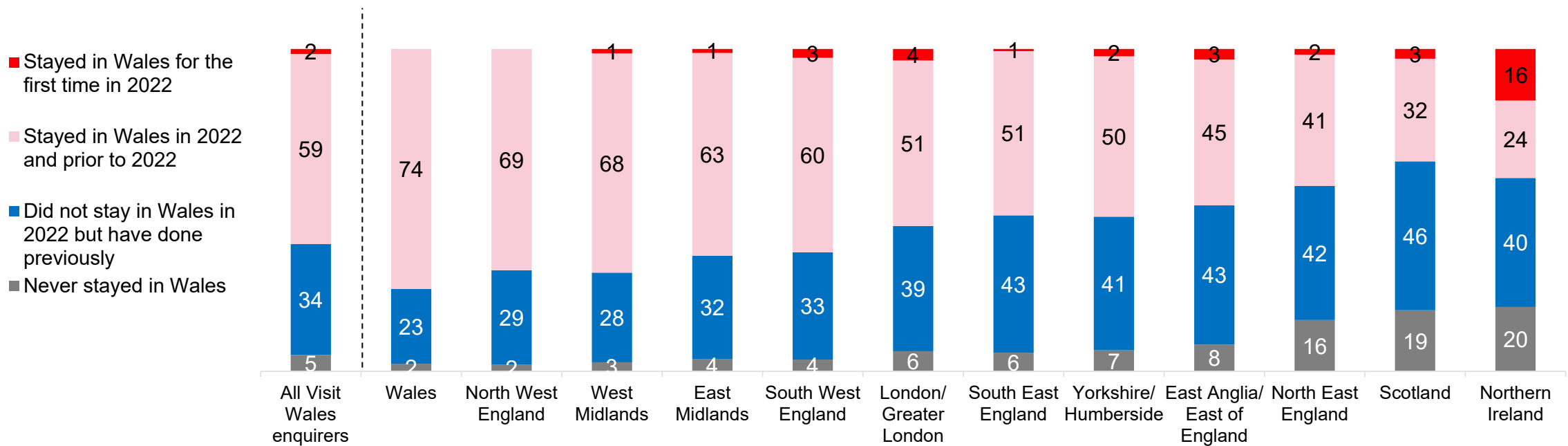


A2a. Did you take a holiday or a short break in Wales in 2022? A2b. Have you taken a holiday or short break in Wales prior to 2022? Base: All Visit Wales enquirers n=5,143; VW Website n=938; Third party promotion n=1,038; Social media n=117; Lead generation n=646; e-CRM n=2,404; Pre-nesters n=472; Families n=524; Older Independents n=2,312; Retirees n=1,976.

# Whether took a short break or holiday in Wales prior to 2022

- Consistent with other findings, the incidence of repeat visits to Wales correlates with geographical proximity – a majority of enquirers from Wales, the North West of England, the West Midlands, East Midlands and the South West of England having stayed there in 2022 and prior to that. Conversely, enquirers from Scotland are the most likely to have taken a short break or holiday in Wales in the past but did not do so in 2022, and enquirers from Northern Ireland and from Scotland are the most likely to have never stayed in Wales.

**Figure 11. When taken holidays or short breaks in Wales, Average and Percentage, All Enquirers, By region of residence**



A2a. Did you take a holiday or a short break in Wales in 2022? A2b. Have you taken a holiday or short break in Wales prior to 2022? Base: All Visit Wales enquirers n=5,143; Base: Wales n=345; West Midlands n=899; North West n=2886; South West n=628; East Midlands n=416; London n=255; East of England n=336; South East n=731; Yorkshire and The Humber n=352; North East n=113; Scotland n=132; Northern Ireland n=25.



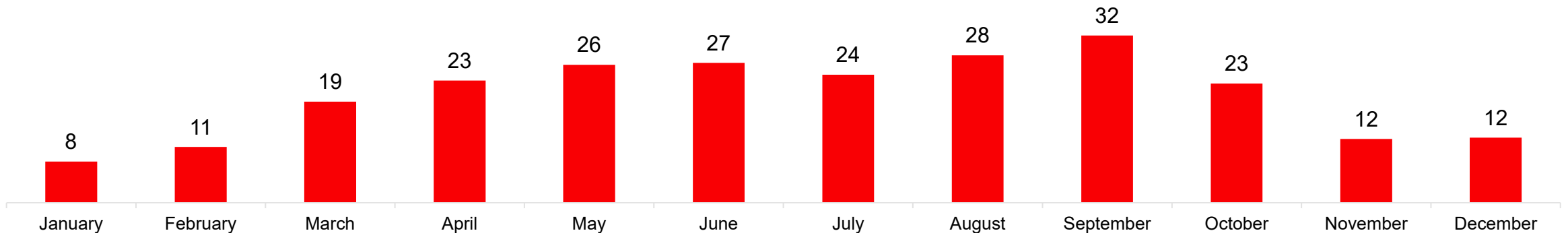
# 2022 trip characteristics



# Month trip taken in Wales in 2022

- Outside of the winter months of January to February and November to December, Visit Wales enquirers stayed in Wales across an even spread of months. September generated the most overnight stays, driven by retirees and older independents. August was relatively popular across all life stages, but particularly amongst families - half staying in Wales in that month.
- There is minimal evidence that different sample sources are driving visits at different times of the year, with the exception of social media – this type of enquirer was more likely to visit in June and September

**Figure 12. Month trip taken in Wales in 2022, Percentage, All 2022 Wales trip-takers**



A4. And in which months of the year did you visit Wales for a short-break or holiday in 2022? A5. On this overnight trip to Wales in [MONTH], how many nights did you stay away for?

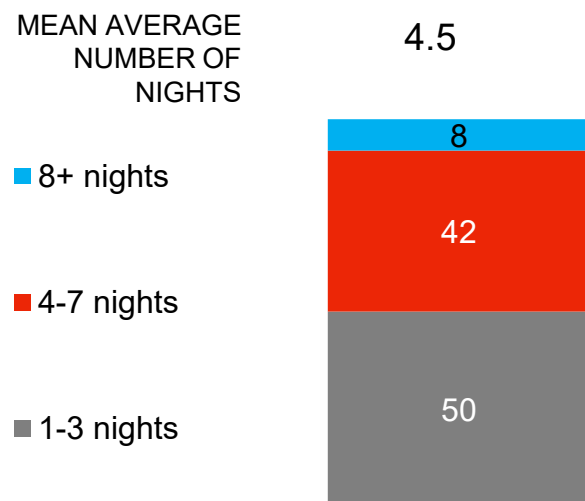
Base: All 2022 Wales trip-takers n=3,256



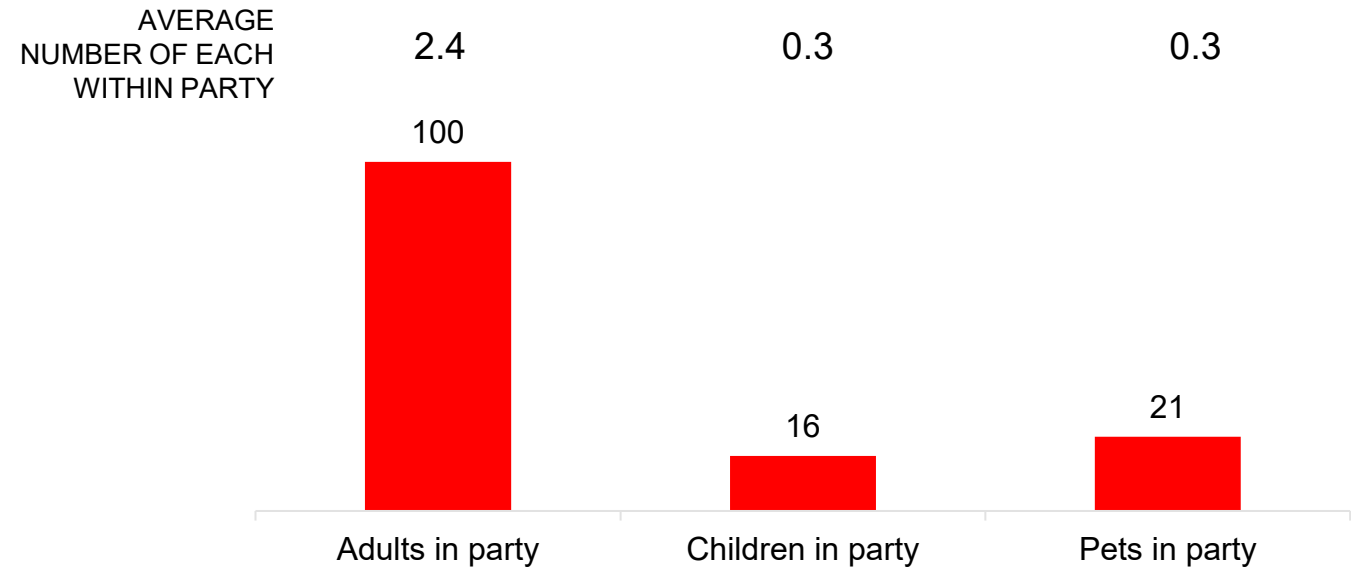
# Number in party and party composition on Wales trip

- On average Wales trip-takers stayed in Wales for 4.5 nights, with an even split between short breaks of 1-3 nights and longer breaks of 4+ nights. The average trip length increases to 5.0 in the summer months, falling to 4.1 nights in December. Retirees tend to take the longest breaks (4.9 nights on average), and pre-nesters the shortest (4.2 nights on average). By sample source, Visit Wales website enquirers stay in Wales for the longest (5.0 nights on average). By region, visitors living in Wales take the shortest trips on average (at 3.5 nights).
- 16% of visitors to Wales had children in their party – unsurprisingly highest amongst the family life stage and in the peak summer months. 21% stayed in Wales with pets, rising to 25% amongst older independents.

**Figure 13. Trip length of Wales overnight stay, Percentage, All 2022 Wales trip-takers**



**Figure 14. Party composition of Wales trip-takers in 2022, Average and Percentage, All 2022 Wales trip-takers**



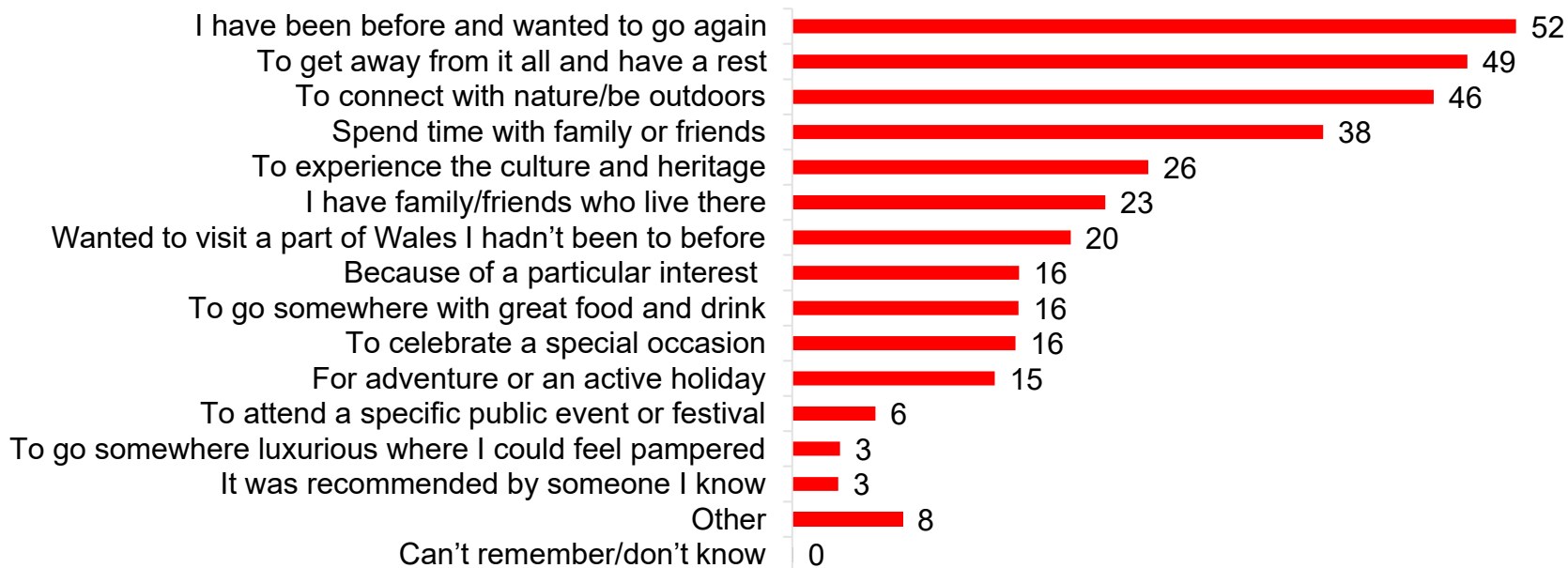
A5. On this overnight trip to Wales in [MONTH], how many nights did you stay away for? A6. Including yourself, how many of the following were there in your immediate party on this overnight trip to Wales in [MONTH]?

Base: All 2022 Wales trip-takers n=3,256 Note: Responses to this question and all subsequent 2022 trip-related questions are based on one randomly selected trip the respondent took in Wales in 2022.

# Reasons for choosing Wales as a destination

- A number of motivations were cited for choosing Wales as a holiday or short break destination in 2022 – over half (52%) stating ‘I have been before and wanted to go again’, and a similar proportion saying ‘to get away from it all and have a rest’ (49%) and ‘to connect with nature/be outdoors’ (46%).
- The pattern was fairly consistent across life stages, although ‘Families’ indexed higher than average for ‘connecting with nature/outdoors’, ‘spending time with family or friends’ and ‘for adventure or an active holiday’. Retirees were the most likely to say they had ‘been before and wanted to visit again’. Older independents scored the highest for ‘getting away from it all and having a rest’.

**Figure 15. Reasons for choosing Wales as a destination, Percentage, All 2022 Wales trip-takers**



A7.Which, if any, of the following were the main factors that made you choose Wales as a destination for this holiday/short break in [MONTH]? Base: All 2022 Wales trip-takers n=3,256

Note: Responses to this question and all subsequent 2022 trip-related questions are based on one randomly selected trip the respondent took in Wales in 2022.



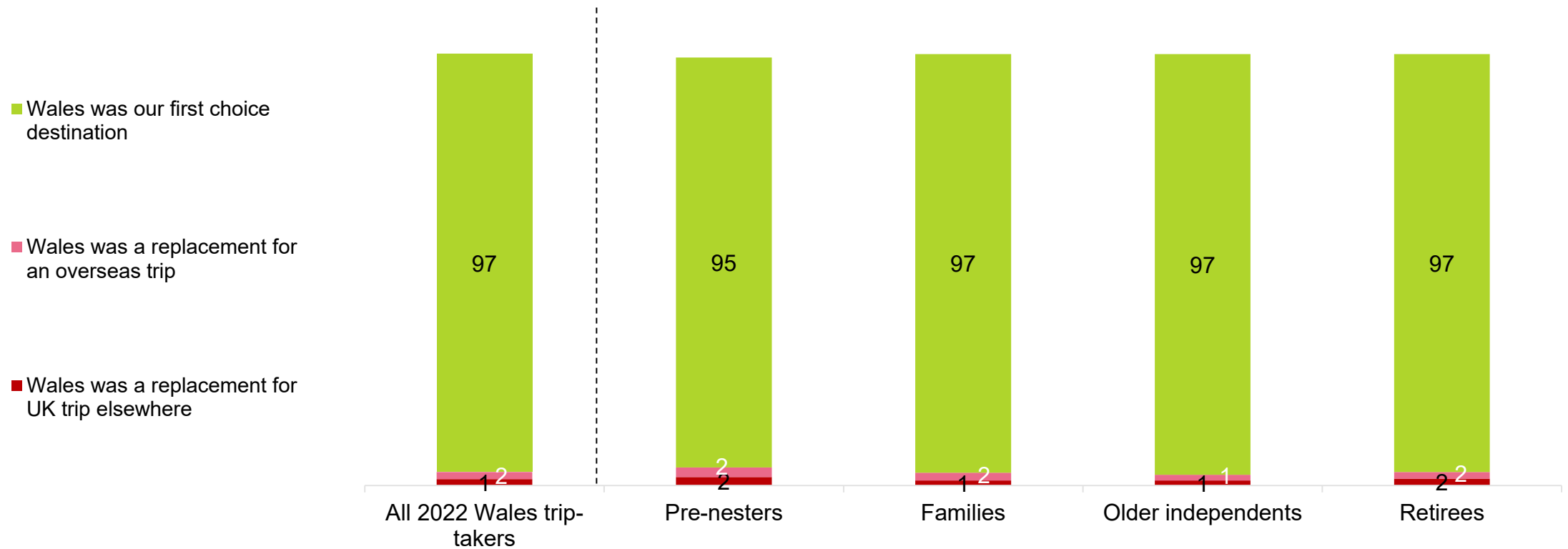
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# Extent to which Wales was first-choice destination

- For the vast majority (97%) of enquirers that visited Wales in 2022, Wales was the first choice destination. There are no notable differences by media group or life stage.

Figure 16. Extent to which Wales was first-choice destination, Percentage, All 2022 Wales trip-takers



UKI-A8. Which, if any, of these statements best apply to your trip in Wales in [MONTH]?

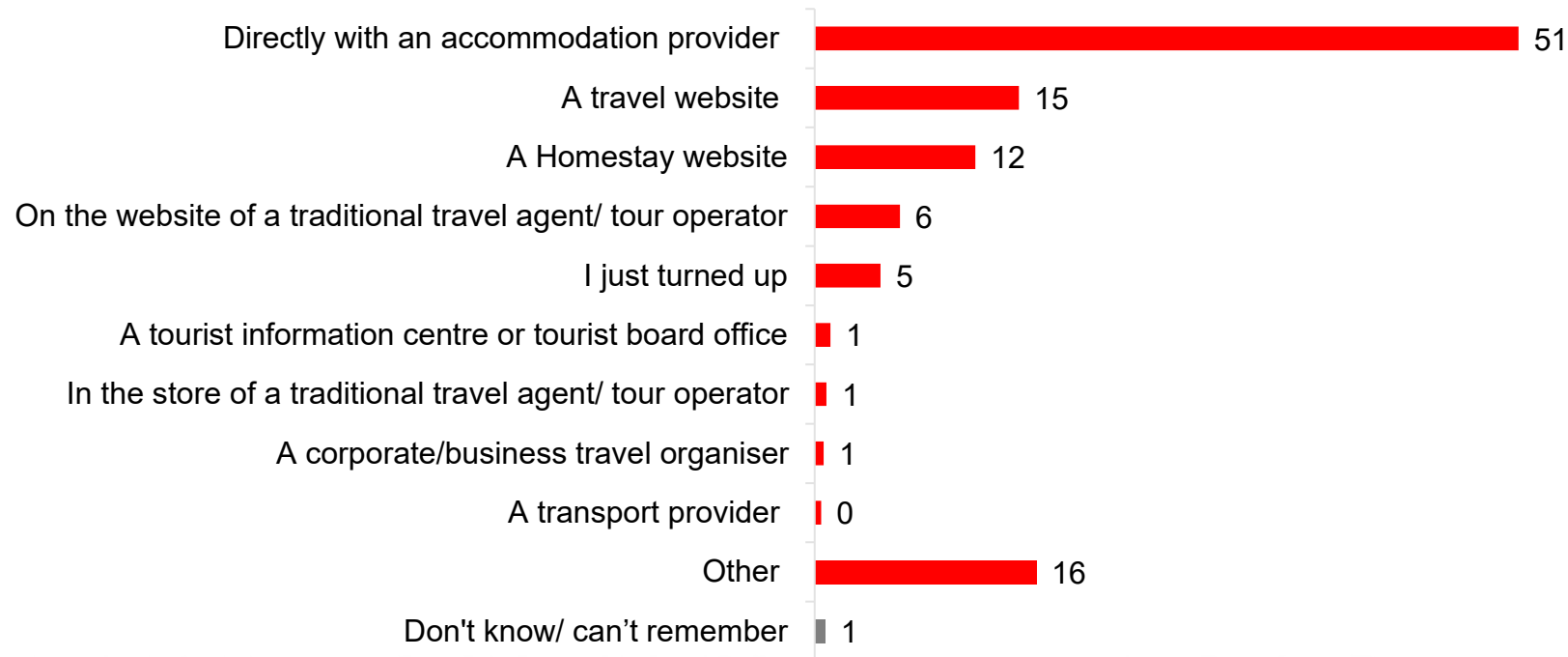
Base: All 2022 Wales trip-takers n=3,256; Pre-nesters n=288; Families n=333; Older Independents n=1,434; Retirees n=1,138



# How accommodation was booked for Wales trip

- Over half (51%) of Wales trip-takers booked their accommodation 'directly with an accommodation provider'. More than three times as many Wales trip-takers reported booking directly with an accommodation provider as those who reported booking via a 'travel website' (15%), which was the next most popular booking option.
- Retirees were the most likely to book directly with an accommodation provider (54%) and the least likely to book via a travel website (12%) or 'a homestay website' (9%). However, broadly the pattern of booking sources was similar across life stages.

**Figure 17. How accommodation was booked for Wales trip, Percentage, All 2022 Wales trip-takers**

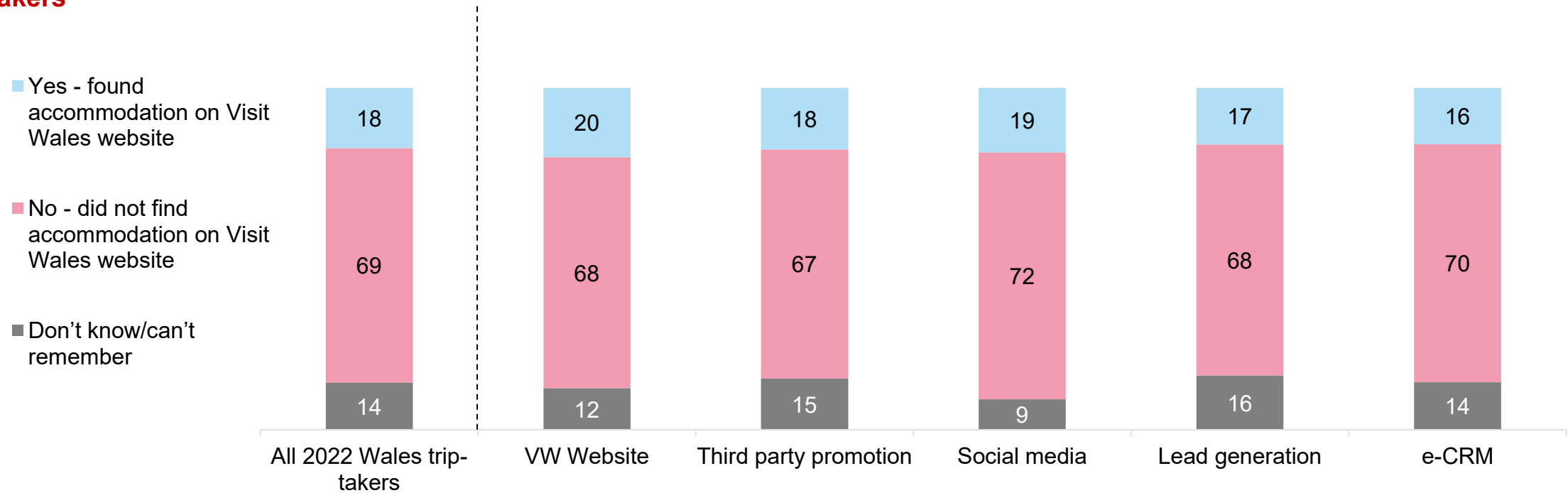


UKI-A9.How did you book your accommodation for this trip to Wales?  
Base: All 2022 Wales trip-takers n=3,256

# Whether found accommodation on Visit Wales website

- Notably, around 1 in 6 (18%) of Wales trip-takers stated they found their accommodation on the Visit Wales website – a proportion consistent across sample sources, although marginally highest amongst Visit Wales website enquirers.
- Retirees were the most likely to find accommodation information on the Visit Wales website (at 21%), families the least (14%).

**Figure 18. Whether found accommodation on Visit Wales website, Percentage, All 2022 Wales trip-takers**



A10. Did you find information or contact details for the accommodation you stayed in on the Visit Wales website?  
 Base: All 2022 Wales trip-takers n=3,256. VW Website n=685; Third party promotion n=589; Social media n=288; Lead generation n=404; e-CRM n=1,488

# Accommodation stayed in during Wales trip

- 'Hotel/motel/inn' was the leading accommodation type for Wales 2022 trip-takers (at 28%), followed by 'rented house/cottage/lodge or similar' (at 25%). A range of other accommodation types were also chosen, including 'friends' or relatives home' (13%) and 'guest house/B&B' (10%).
- Accommodation choice varies by life stage – retirees the most likely to stay in a 'hotel/motel/inn' (32%) and the least likely to stay in a 'tent' (2%). Families were the most likely to stay in a 'static caravan – not owned by you' (11%), a 'tent' (11%) and 'in someone else's home on a commercial basis - rental of full property' (9%). Accommodation choice also differed by month stayed in Wales – 'friends or relatives' homes indexing higher in the winter months, outdoor-based accommodation (such as camping) indexing higher in the summer months.

**Figure 19. Accommodation stayed in during Wales trip, Percentage, All 2022 Wales trip-takers**



A11. What type/s of accommodation did you stay in during your trip in [month] in Wales?

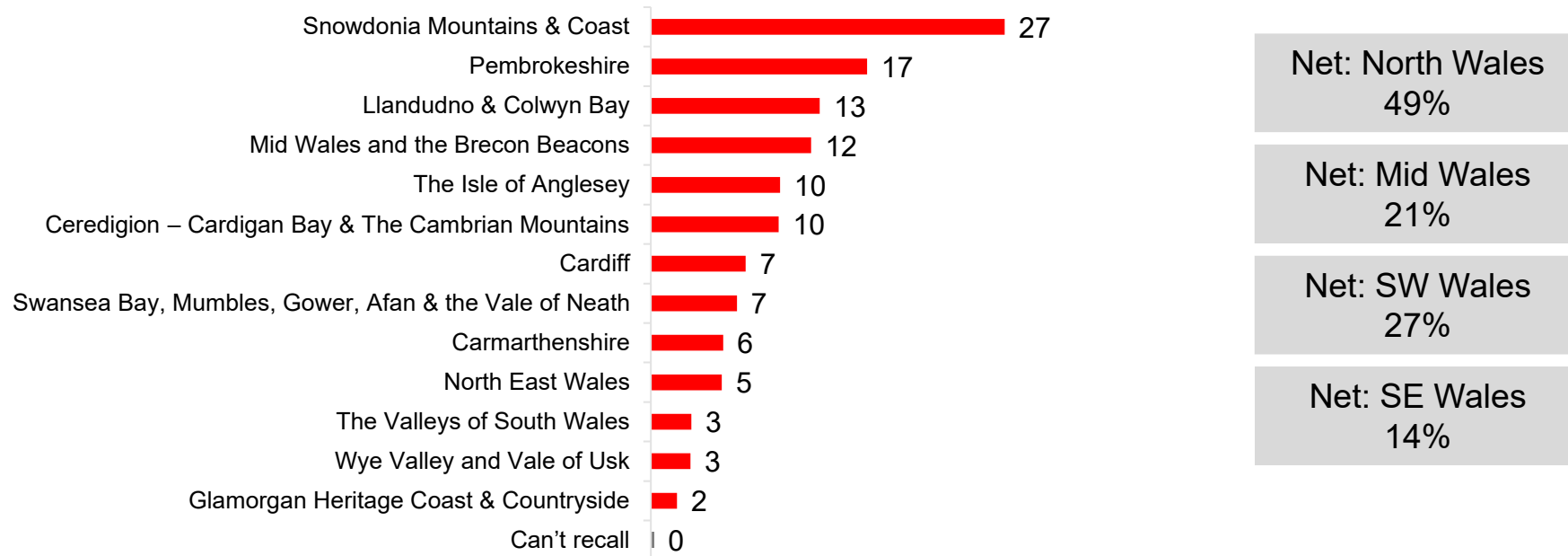
Base: All 2022 Wales trip-takers n=3,256

Note: Responses to this question and all subsequent 2022 trip-related questions are based on one randomly selected trip the respondent took in Wales in 2022. All responses under 3% are combined into 'other'.

# Where stayed in Wales during trip

- North Wales attracted the highest number of overnight visits (with half of 2022 trip-takers staying there), driven by ‘Snowdonia mountains and coast’, which at 27% was the most stayed in destination in Wales. South West Wales generated stays from 27% of trip-takers, driven by Pembrokeshire, the second-most stayed in destination in Wales.
- Wales destination is driven in part by proximity to place of residence – visitors from the North West of England, for example, were most likely to stay in North Wales; those from Wales (where population is highest in the south), the South West and South East of England were most likely to stay in Pembrokeshire.

**Figure 20. Where stayed in Wales during trip, Percentage, All 2022 Wales trip-takers**



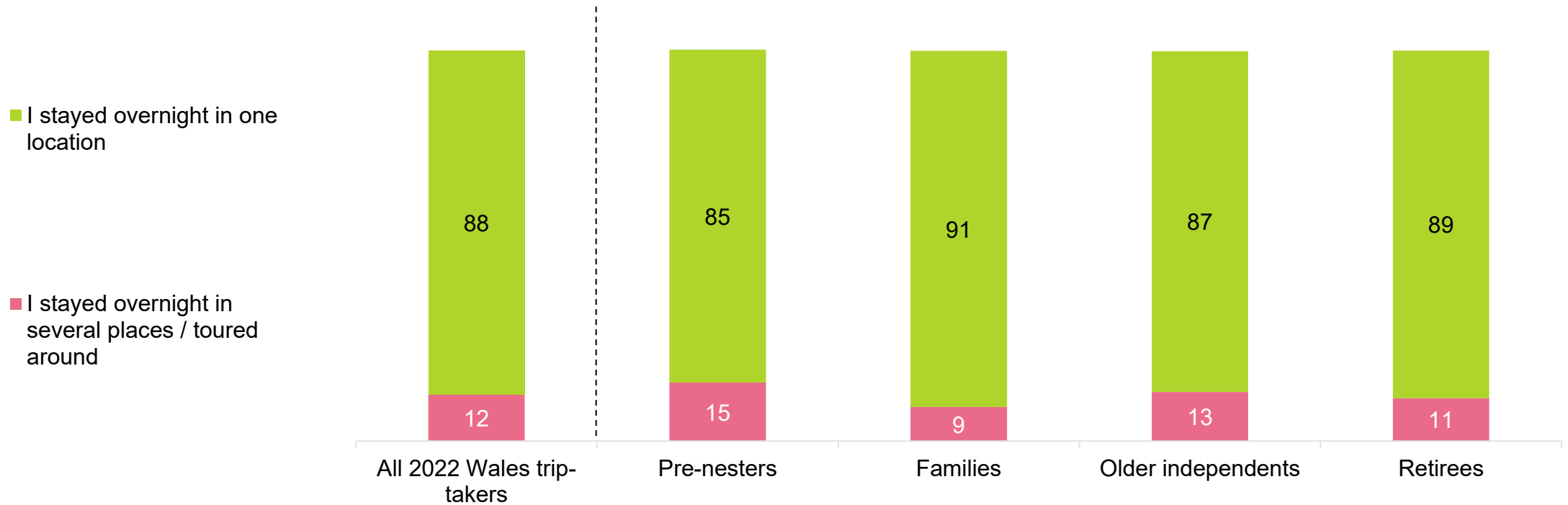
UKI-A12. Where in Wales did you stay overnight on this trip in [MONTH]? Base: All 2022 Wales trip-takers n=3,256. North Wales = North East Wales, Llandudno & Colwyn Bay, Snowdonia Mountains & Coast, The Isle of Anglesey; Mid Wales = Mid Wales and the Brecon Beacons and Ceredigion; SW Wales = Pembrokeshire, Carmarthenshire and Swansea Bay; SE Wales = Cardiff, The Valleys of South Wales, Glamorgan Heritage Coast and Wye Valley. Note: Responses to this question and all subsequent 2022 trip-related questions are based on one randomly selected trip the respondent took in Wales in 2022.



# Type of trip taken

- The majority (88%) of Wales overnight visitors stayed overnight in one location on their trip, relatively consistent across life stages, albeit highest amongst families. Those that stayed in more than one location stayed in an average of two places.
- First-time visitors to Wales were more likely to stay in more than one place than those on a repeat visit (25% compared to 12%).

Figure 21. Type of trip taken on Wales trip, Percentage, All 2022 Wales trip-takers



A13. Which of the below best describes your trip in Wales in [MONTH]?

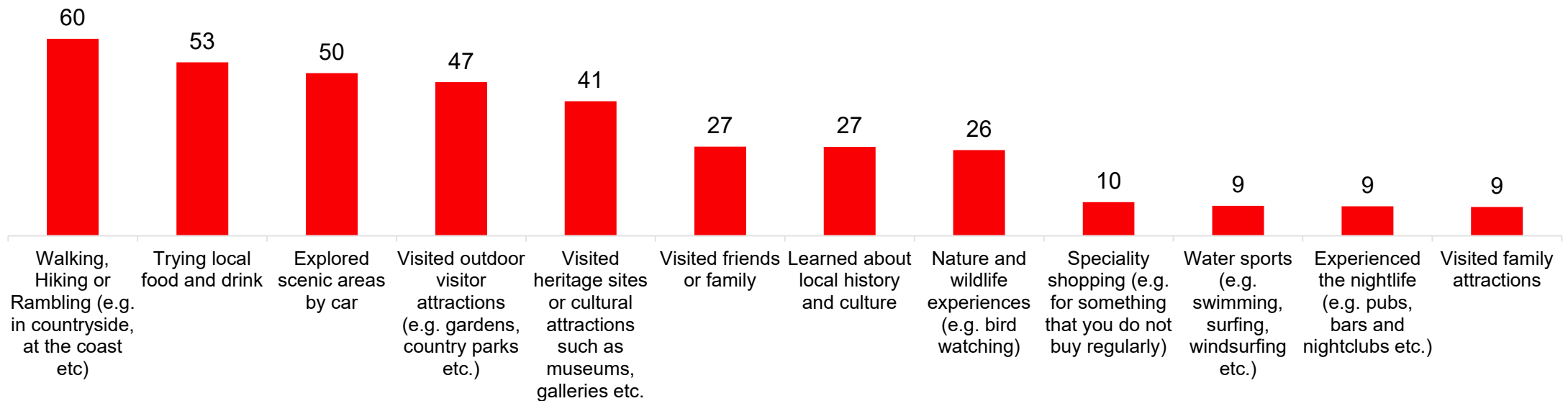
Base: All 2022 Wales trip-takers n=3,256; Pre-nesters n=288; Families n=333; Older Independents n=1,434; Retirees n=1,138



# Trip behaviour on Wales trip – Top 12

- ‘Walking, hiking or rambling’ was by far the most popular activity for trip-takers on their 2022 trip, followed by ‘trying local food and drink’, ‘exploring scenic areas by car’, ‘visiting outdoor attractions’ and ‘visiting heritage sites or culture attractions’ – all conducted by more than 2 in 5 visitors.
- Although the overall patterns are similar, there are some differences by life stage. Families were the most likely to engage in ‘water sports’ (23%) and to visit ‘family attractions (29%)’. Older independents indexed particularly high on ‘walking, hiking or rambling’ (65%). Pre-nesters and retirees were largely in line with average.

**Figure 22. Activities conducted on Wales trip, Percentage, Top 12, All 2022 Wales trip-takers**



A14. Which, if any, of the following did you do on this trip in Wales in [MONTH]?

Base: All 2022 Wales trip-takers n=3,256



# Trip behaviour on Wales trip – Bottom 11

- A range of other activities were conducted by a more niche proportion of Wales visitors. For example, around 1 in 14 undertook ‘creative or artistic pursuits’, ‘attended live music, festivals or arts performances’ and undertook ‘adventure activities’ – the latter rising to 15% amongst the family life stage.

**Figure 23. Activities conducted on Wales trip, Percentage, Bottom 11, All 2022 Wales trip-takers**



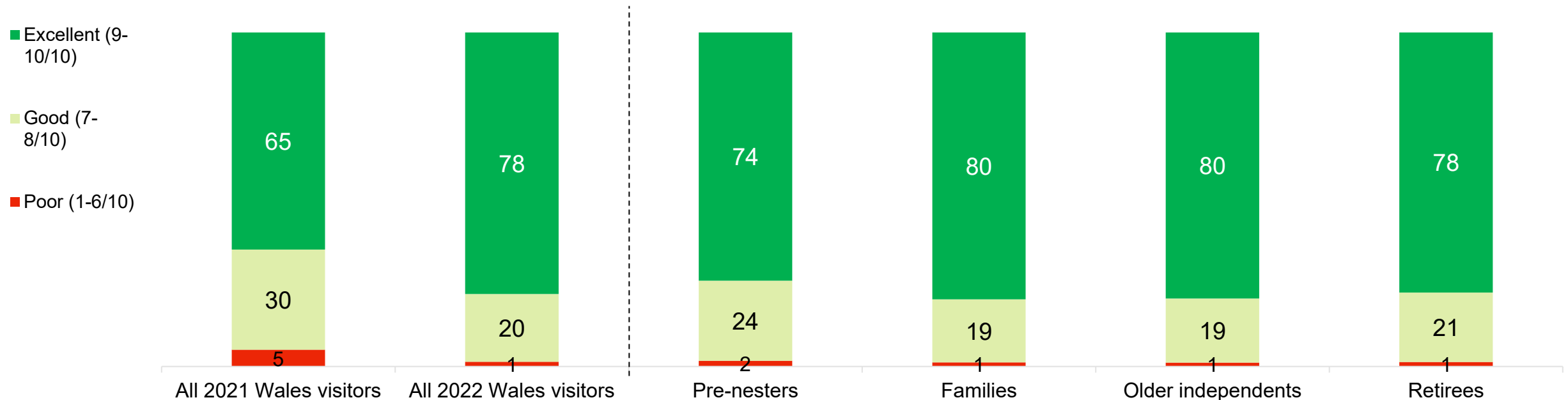
A14. Which, if any, of the following did you do on this trip in Wales in [MONTH]?

Base: All 2022 Wales trip-takers n=3,256

# Rating of experience staying in Wales

- Nearly 4 in 5 (78%) of Wales overnight visitors rated their experience in Wales as 'excellent' (9-10 out of 10), a notable rise on 2021 ratings. 2 in 10 rated the visit as 'good' and only 1% as 'poor'.
- By life stage, ratings were slightly lower for pre-nesters (74% compared to 78% on average), but equally high across other life stages. First time visitors were more likely to give a lower score (68% scoring their visit as 9-10 out of 10, compared to 79% amongst repeat visitors).

**Figure 24. Rating of experience staying in Wales, Percentage, All 2022 Wales trip-takers and by life stage**



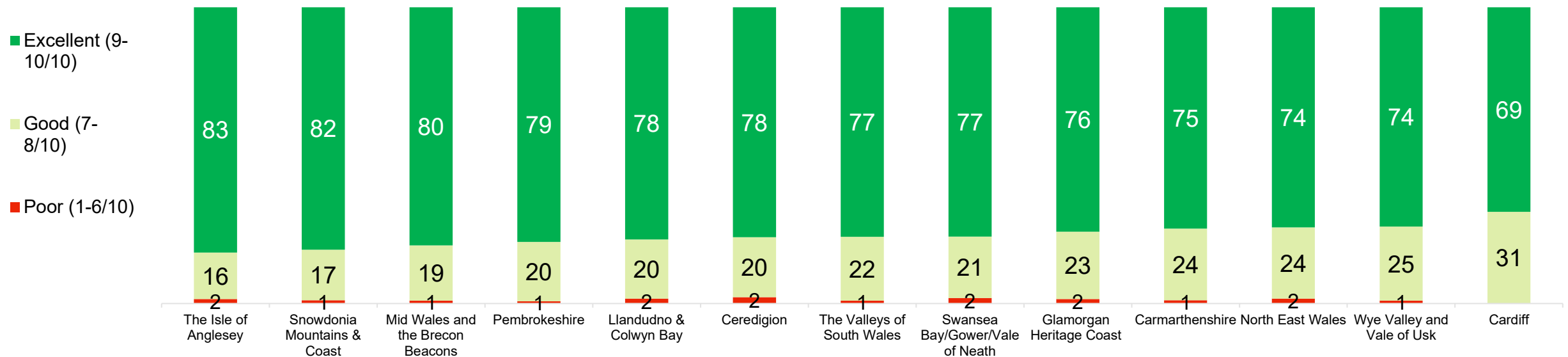
A15. Now going back to your overnight trip in Wales in <INSERT MONTH>, how would you rate your experience overall?  
 Base: All 2022 Wales trip-takers n=3,256. Pre-nesters n=288; Families n=333; Older Independents n=1,434; Retirees n=1,138



# Rating of experience staying in Wales – by location stayed in\*

- When looking at location, ratings were high amongst visitors to all parts of Wales – those who stayed in ‘The Isle of Anglesey’, ‘Snowdonia Mountains and Coast’ and ‘Mid Wales and the Brecon Beacons’ giving the highest ratings.

**Figure 25. Rating of experience staying in Wales, Percentage, All 2022 Wales trip-takers**



A15. Now going back to your overnight trip in Wales in <INSERT MONTH>, how would you rate your experience overall?

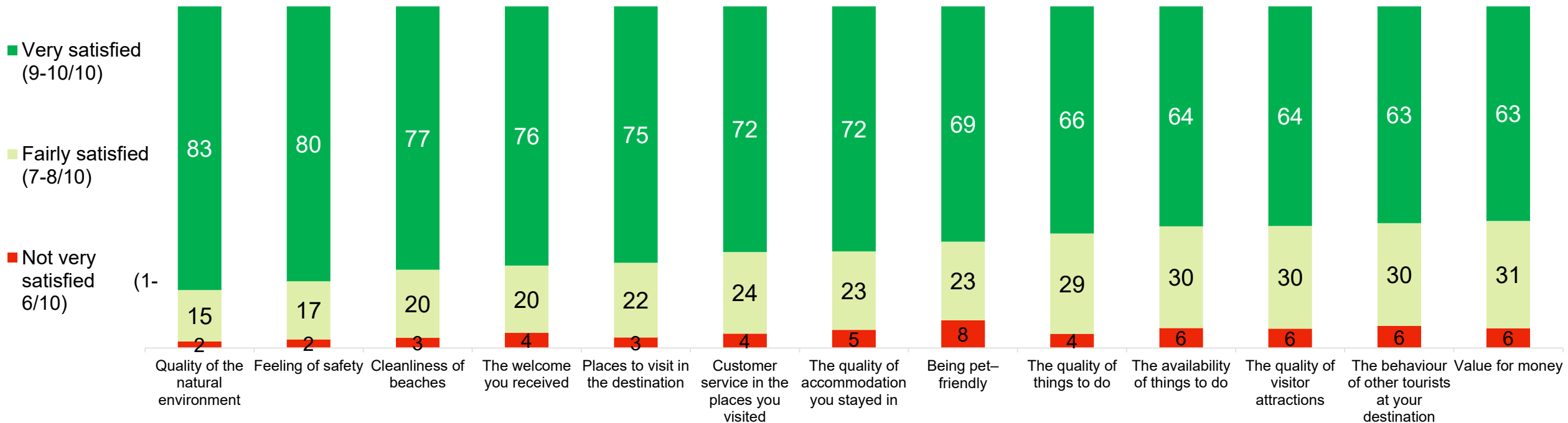
Base: The Isle of Anglesey n=325; Snowdonia Mountains & Coast n=890; Mid Wales and the Brecon Beacons n=403; Pembrokeshire n=544; Llandudno & Colwyn Bay n=425; Ceredigion n=322; The Valleys of South Wales n=102; Swansea Bay n=217; Glamorgan Heritage Coast n=66; Carmarthenshire n=182; North East Wales n=179; Wye Valley and Vale of Usk n=100; Cardiff n=239 \*Please note that findings from this chart are inferred from cross-referencing overall ratings with where visitors stayed (two separate questions) – respondents were not asked to directly rate a destination so these findings should be regarded as indicative only.



# Satisfaction with different elements of the Wales experience

- When assessing individual elements of the trip, Wales trip-takers were very satisfied with a wide range of areas. They were most likely to report being 'very satisfied' with the 'quality of the natural environment' in Wales, followed by 'feeling of safety', 'cleanliness of beaches', 'the welcome you received' and 'places to visit'.

**Figure 26. Satisfaction with different elements of the Wales visit experience, Percentage, Top 13, All 2022 Wales trip-takers**



A16/17. How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>?

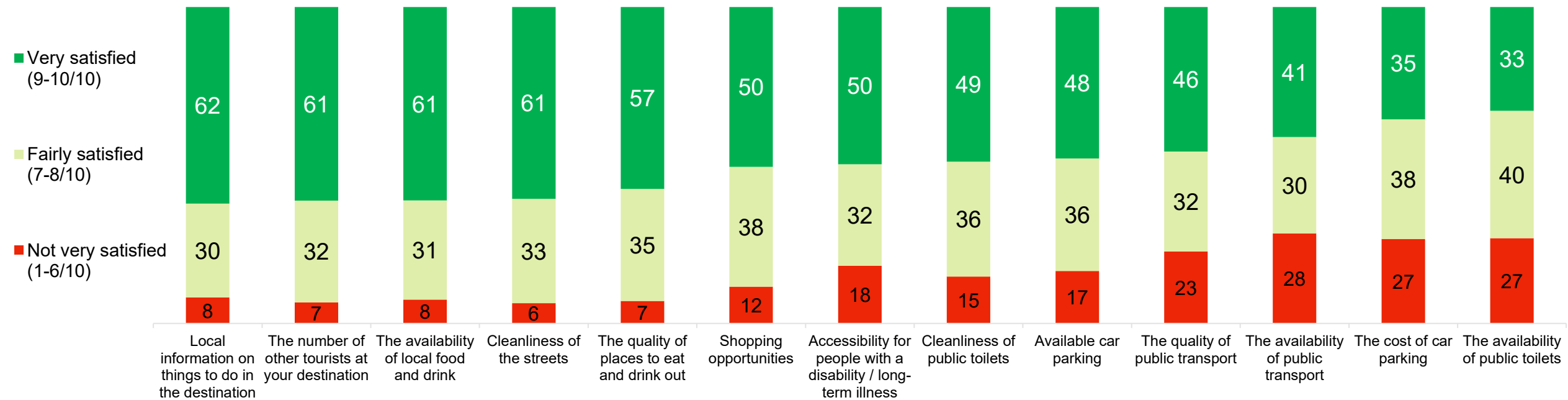
Base: All 2022 Wales trip-takers n=3,256. NA responses removed



# Satisfaction with different elements of the Wales experience

- Of all the measures tested, ratings of the Wales visit experience were lowest for 'the availability of public transport' (28% 'not very satisfied'), 'the availability of public toilets' (27%) and 'the cost of car parking' (also 27%). 'The quality of public transport' also received low ratings, as did 'accessibility for people with a disability'

**Figure 27. Satisfaction with different elements of the Wales visit experience, Percentage, Bottom 13, All 2022 Wales trip-takers**



A16/17. How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>?

Base: All 2022 Wales trip-takers n=3,256. NA responses removed. Accessibility for people with a disability only asked of those stating they have a disability n=1,012



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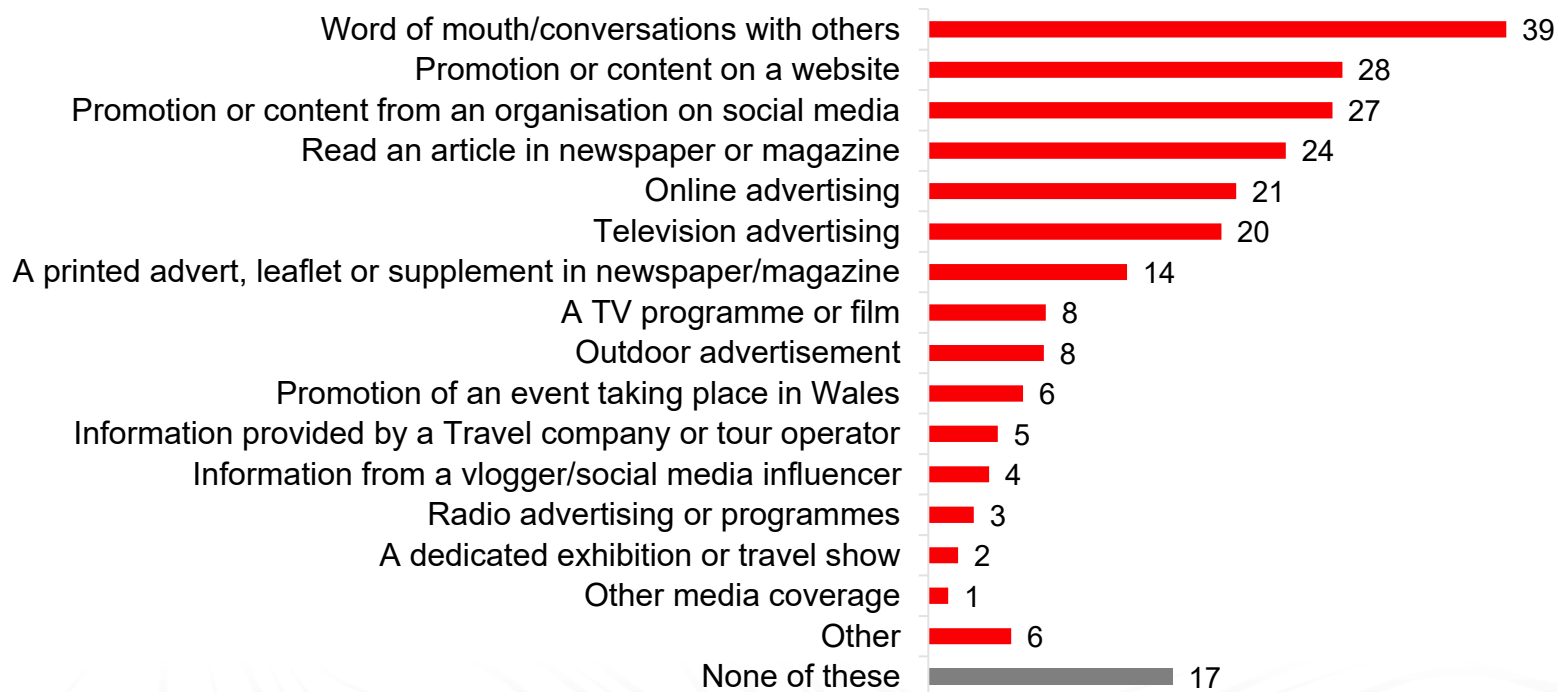
# Marketing Impact



# Ways in which seen or heard about Wales in 2022

- Wales trip-takers were most likely to have seen or heard about Wales through ‘word of mouth’ in 2022, with 39% stating they had heard about Wales in this way. Around 3 in 10 had seen or heard about Wales through ‘promotion or content on a website’ (28%) and ‘promotion or content from an organisation on social media’ (27%). Wales trip-takers have also heard about Wales through a range of other sources – for example, 1 in 5 reported having seen television advertising (20%) and online advertising (21%).
- There was some variation by life stage – families and older independents indexed higher for seeing ‘content on social media’ whilst retirees indexed low in this area but highest for ‘reading an article’ about Wales.

**Figure 28. Ways in which seen or heard about Wales in 2022, Percentage, All 2022 Wales trip-takers**



A18. Thinking about marketing and communications which, if any, of the following did you see or hear about Wales during 2022? Base: All 2022 Wales trip-takers n=3,256

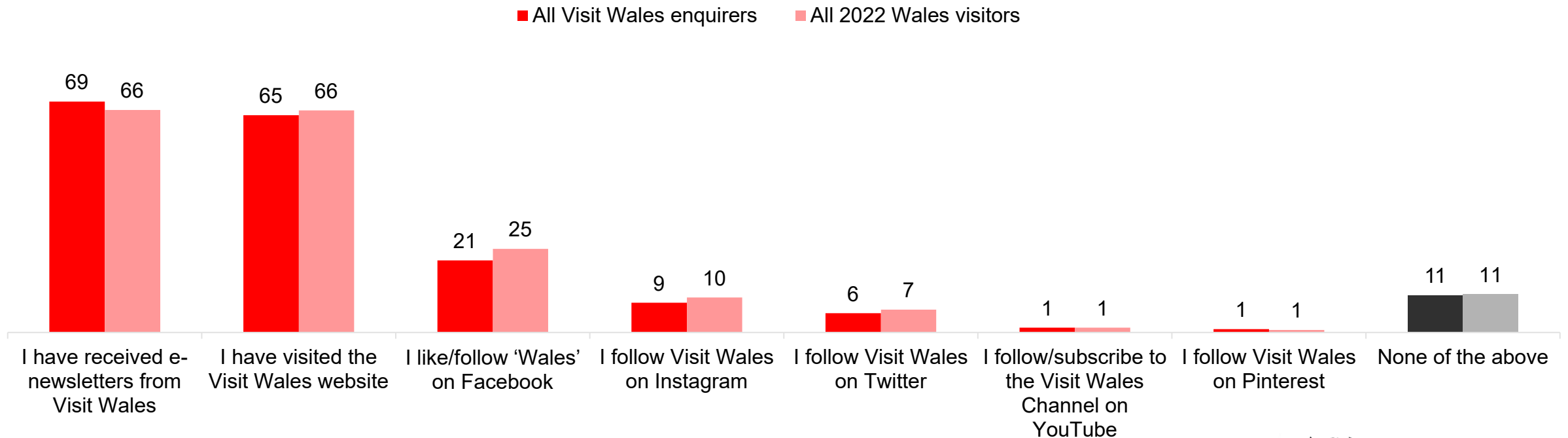




# Engagement with Visit Wales marketing and communications

- Perhaps unsurprisingly given the method of recruitment for this research, Visit Wales e-newsletters was the channel of communication Wales visitors were most likely to have engaged with in 2022, along with the Visit Wales website – both engaged with by 66% of 2022 trip takers. 3 in 10 enquirers had engaged with Visit Wales social media, driven by followers of the Facebook page.
- There was high engagement with e-newsletters and the Visit Wales website for all life stages – however, social media engagement was especially strong for families, and relatively low for retirees.

**Figure 29. Engagement with Visit Wales marketing and communications, Percentage, All Enquirers**



UKI-A19. Thinking about all the contact you had with Visit Wales in 2022, which of the following apply to you?

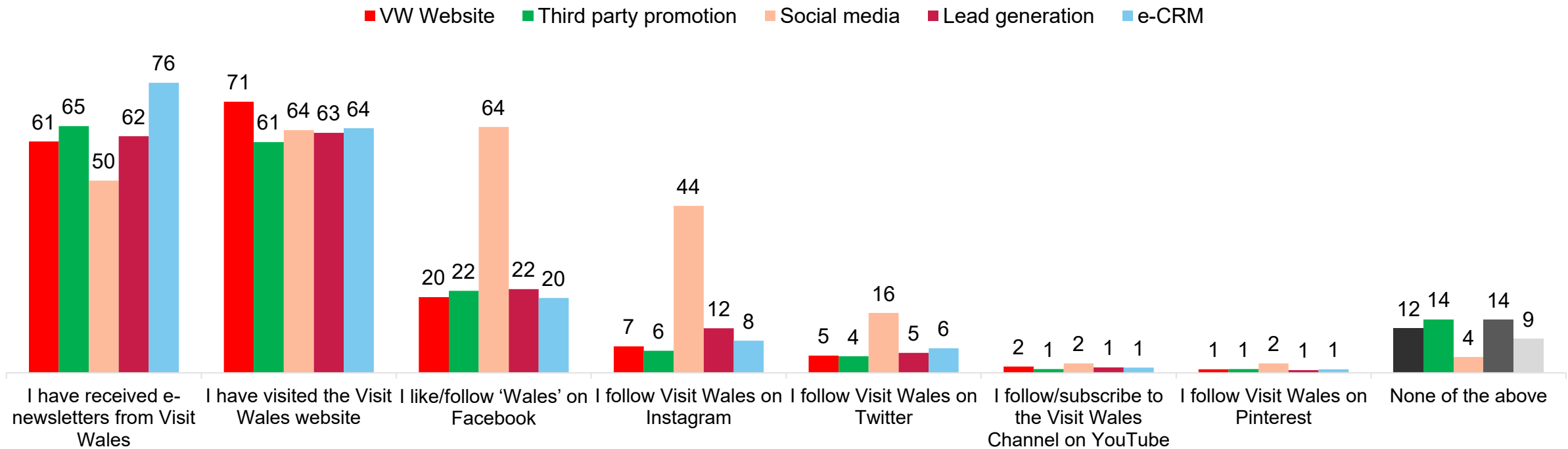
Base: All Visit Wales enquirers n=5,381. All 2022 Wales trip-takers n=3,256



# Engagement with Visit Wales marketing and communications\*

- Engagement with Visit Wales marketing and communications by sample source followed fairly intuitive patterns. Website enquirers indexed highest for visits to the Visit Wales website, e-CRM enquirers reported the highest recall of receiving an e-newsletter from Visit Wales, whilst social media enquirers reported strongest engagement with Facebook, Instagram and Twitter. It's also worth noting that enquirers report high-levels of multi-media engagement. For example, 2 in 3 (64%) of social media enquirers visit the Visit Wales website, and around half recall receiving e-newsletters.

**Figure 30. Engagement with Visit Wales marketing and communications, Percentage, All Enquirers, By sample source**



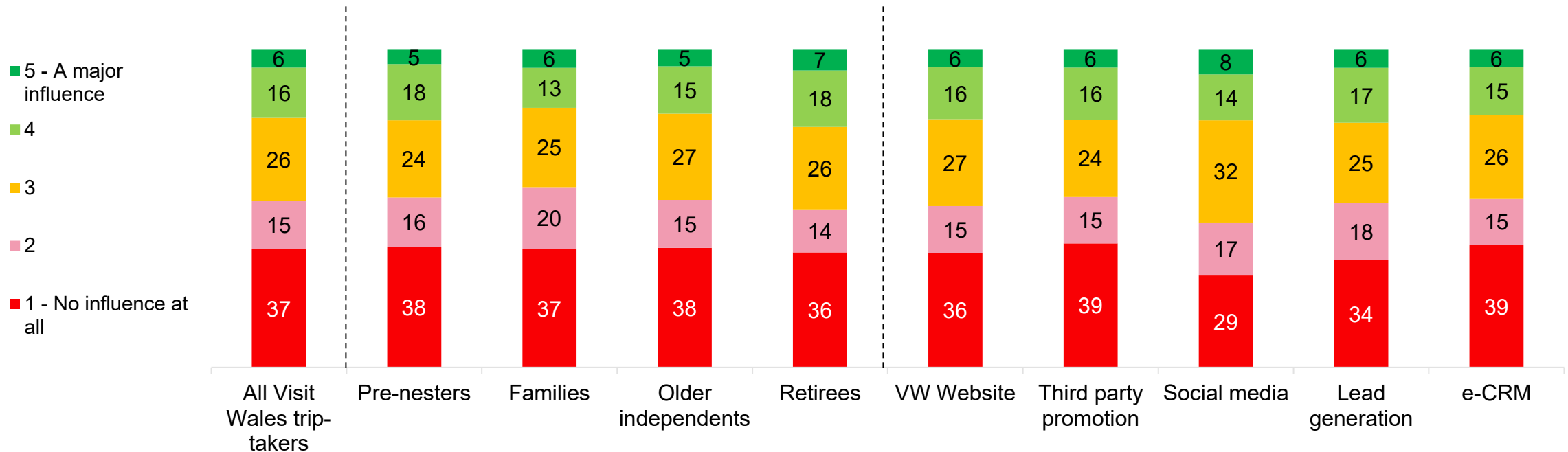
A19. Thinking about all the contact you had with Visit Wales in 2022, which of the following apply to you?  
 Base: All Visit Wales enquirers n=5,381. VW Website n=976; Third party promotion n=1,105; Social media n=121; Lead generation n=683; e-CRM n=2,496 \*Please note Visit Wales engagement by sample source will be driven by where the sample is recruited from. There may also be some mis-attribution with 'e-newsletter' recall, all respondents having received an email invite to this survey.



# Influence of Visit Wales communications on trip decision

- Nearly 1 in 4 Wales visitors stated that Visit Wales communications were an influence (4-5 out of 5) on their decision to take their holiday or short break in Wales – social media enquirers were more likely to state it was a major influence than enquirers from other sample sources, and the least likely to state it was ‘no influence at all’. There was limited difference in influence by life stage or region (with the exception of influence being lower amongst enquirers from the South East of England, excluding London).

**Figure 31. Influence of Visit Wales communications on trip decision, Percentage, All 2022 Wales trip-takers, By sample source**



A22.What influence, if any, did the Visit Wales communications have on your decision to take your holiday or short break in [MONTH]?

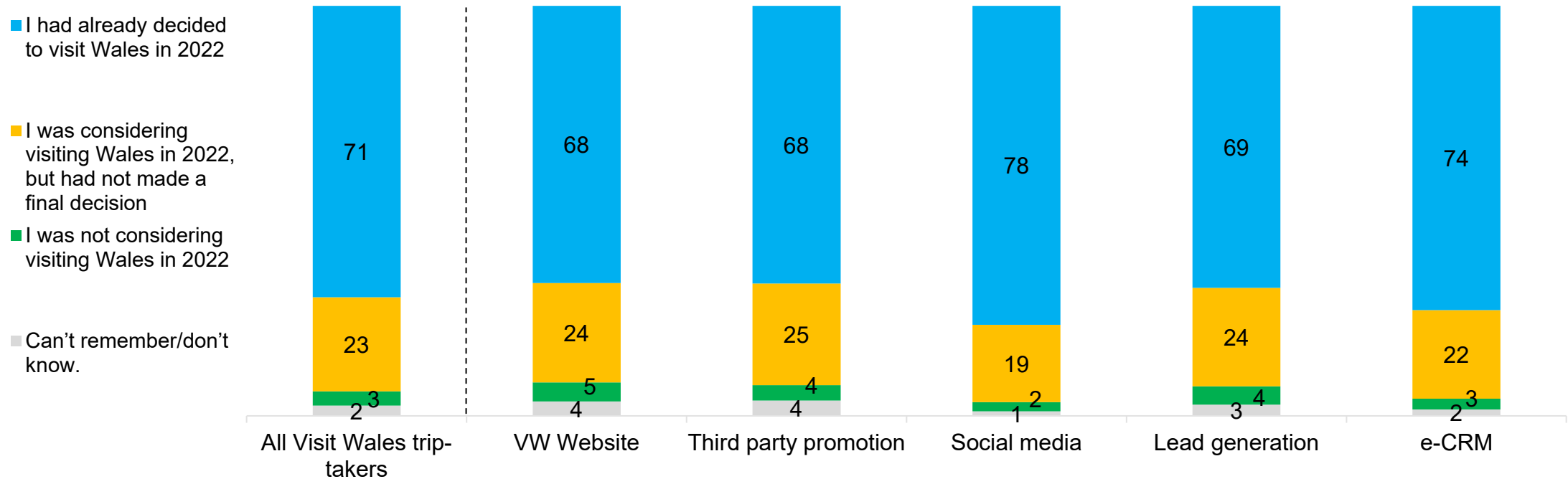
Base: All 2022 Wales trip-takers n=3,256. Pre-nesters n=288; Families n=333; Older Independents n=1,434; Retirees n=1,138 VW Website n=685; Third party promotion n=589; Social media n=288; Lead generation n=404; e-CRM n=1,488



# Mindset around visiting Wales at the end of 2021

- By the end of 2021, around 7 in 10 (71%) Visit Wales trip-takers had already decided to take a holiday or short break in Wales in 2022 – this was highest amongst social media enquirers. However, nearly 1 in 4 (23%) were considering Wales but had not made a final decision. A very small minority (3%) were not considering visiting Wales at all.
- Perhaps notably, over half (56%) of those that visited Wales for the first time in 2022 had either not made a final decision by the end of 2021 (41%) or were not considering Wales at that point (15%).

**Figure 32. Mindset around visiting Wales at the end of 2021, Percentage, All 2022 Wales trip-takers, By sample source**



A24. Finally in this section, thinking back to the end of 2021, which of these statements best describes your plans at that time to visit Wales in 2022?

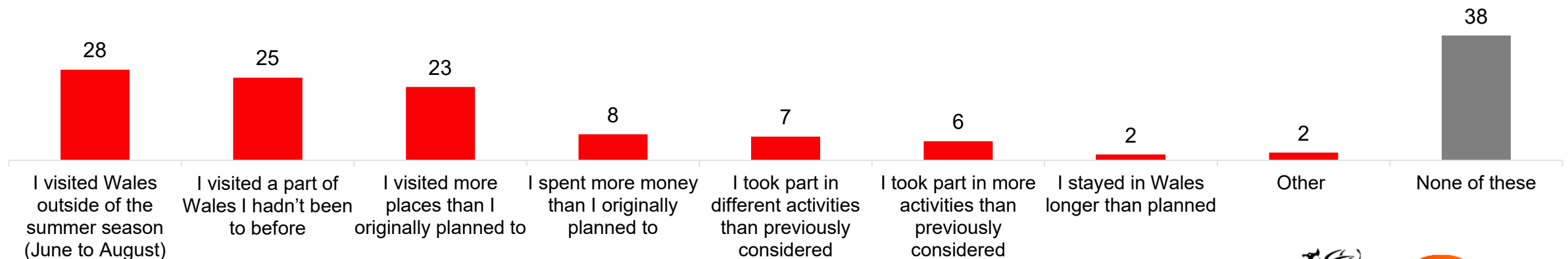
Base: All 2022 Wales trip-takers n=3,256. VW Website n=685; Third party promotion n=589; Social media n=288; Lead generation n=404; e-CRM n=1,488



# Ways in which Visit Wales communications impacted trip

- The Visit Wales communications appear to be having a positive impact on spreading trips across the year and to different parts of Wales.
- 'I visited Wales outside of the summer season' was the main way in which Visit Wales communications impacted Wales trips taken in 2022 – particularly amongst retirees. This was followed by 'I visited a part of Wales I hadn't been to before' (25%) and 'I visited more places than I originally planned to'.
- Communications also influenced behaviour in other ways – albeit to a lesser extent. 8% 'spent more money than originally planned', 7% 'took part in different activities' and 6% 'took part in more activities'.

**Figure 33. Engagement with Visit Wales marketing and communications, Percentage, All 2022 Wales trip-takers**



A23. In which, if any, of these ways do you think Visit Wales communications impacted your trip in [MONTH] to Wales?

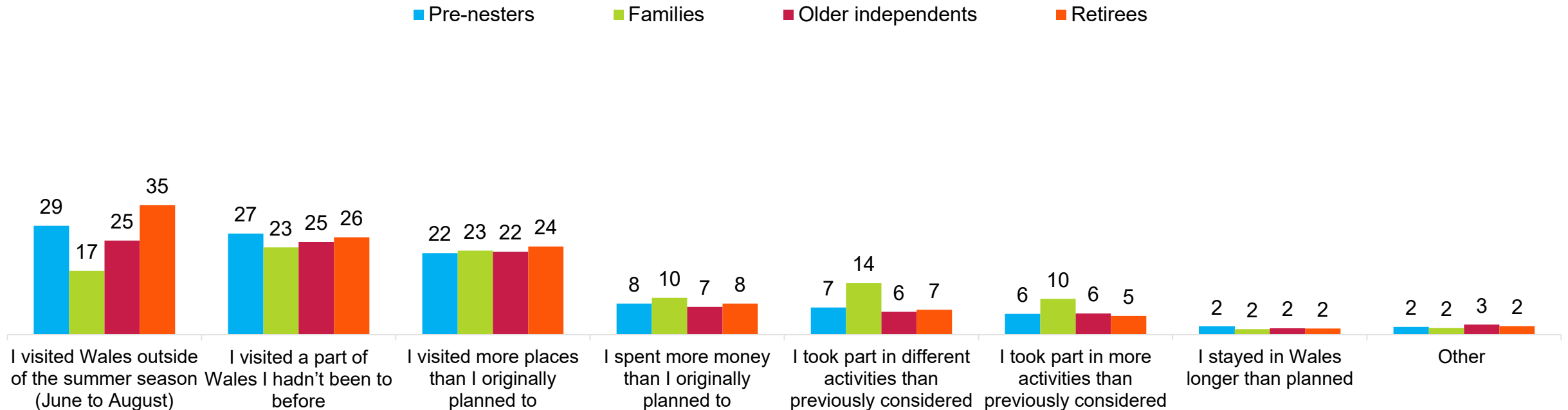
Base: All 2022 Wales trip-takers n=3,256



# Ways in which Visit Wales communications impacted trip

- There was some variation in how Visit Wales communications impacted Wales visitors by life stage – although these will in part be driven by their typical behaviour. Retirees, for example, were the most likely to report having been influenced to visit Wales outside of the summer season (families the least likely). Families were the most likely to report having been influenced to take part in different or more activities than previously considered.

**Figure 34. Engagement with Visit Wales marketing and communications, Percentage, All 2022 Wales trip-takers, By life stage**



A23. In which, if any, of these ways do you think Visit Wales communications impacted your trip in [MONTH] to Wales?  
 Base: All 2022 Wales trip-takers n=3,256. Pre-nesters n=288; Families n=333; Older Independents n=1,434; Retirees n=1,138



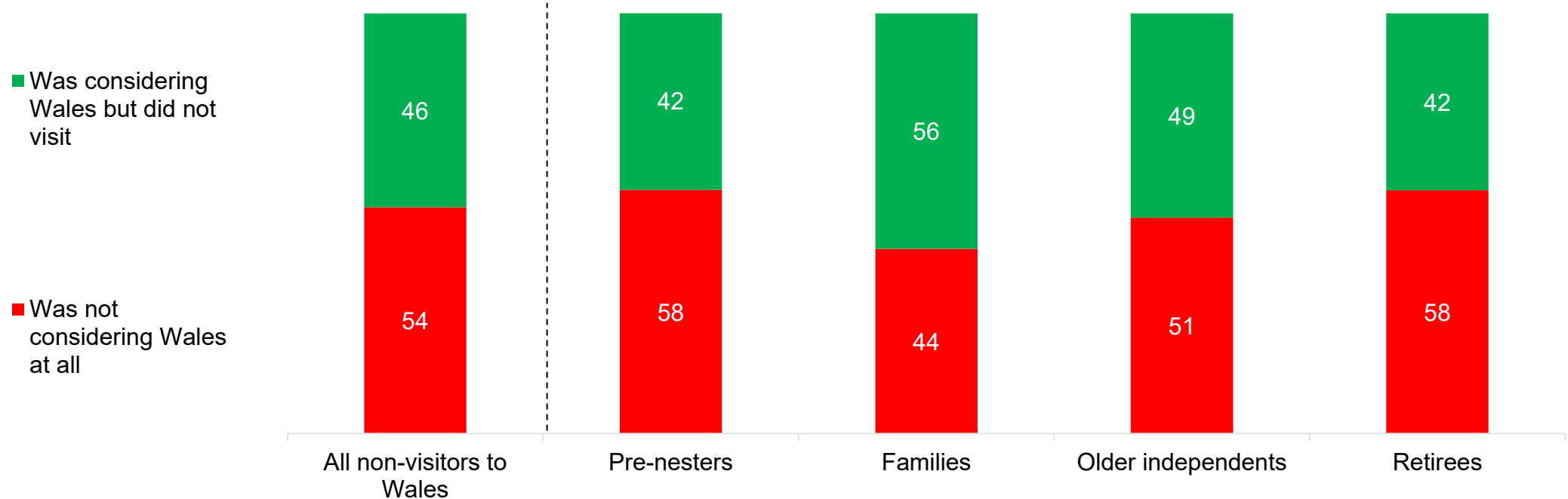
# Reasons for not taking trips to Wales in 2022



# Wales consideration amongst non-visitors to Wales

- Of the enquirers that did not visit Wales in 2022, around half (46%) were considering going at some stage, highest amongst families (56%) and lowest amongst pre-nesters and retirees (both 42%).

**Figure 35. Wales visiting intentions by non-visitors to Wales, Percentage, non-visitors to Wales, By life stage**



B1. You mentioned that you did not take a holiday or short break in Wales during 2022. Were you considering a trip in Wales in 2022 at any stage? Base All non-visitors to Wales n=2,125; Pre-nesters n=184; Families n=191; Older Independents n=878; Retirees n=838



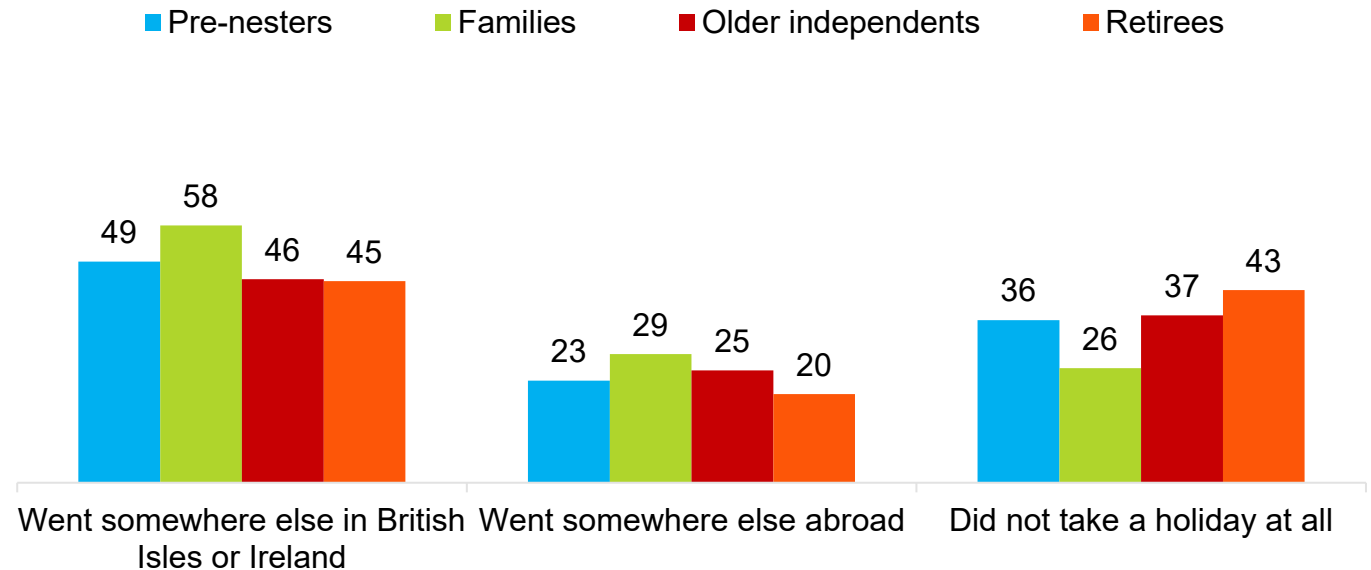
# Destination consideration amongst non-visitors to Wales

- Nearly half (47%) of non-visitors to Wales in 2022 'went somewhere else in the British Isles or Ireland instead', highest amongst families. Around 1 in 4 'went somewhere else abroad' also highest amongst families, and 2 in 5 (39%) 'did not take a holiday at all', which was highest amongst retirees.

**Figure 36. Other destination visiting intentions by non-visitors to Wales, Percentage, non-visitors to Wales**



**Figure 37. Other destination visiting intentions by non-visitors to Wales, Percentage, non-visitors to Wales, By life stage**



B2. And did you go somewhere else for a holiday or did you not take a holiday at all?

Base All non-visitors to Wales n=2,125; Pre-nesters n=184; Families n=191; Older Independents n=878; Retirees n=838

# Destination consideration amongst non-visitors to Wales

- Of the non-visitors to Wales that went elsewhere in the British Isles, 'the West Country (including Devon and Cornwall)' was the most visited alternative destination, followed by Scotland, Yorkshire and The South Coast of England.

Figure 38. Destination of those that went elsewhere in the British Isles, Percentage, non-Wales visitors

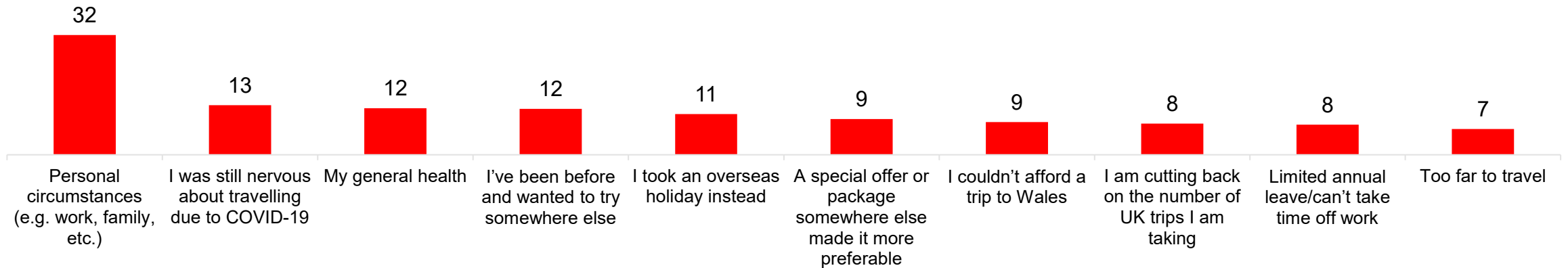


B3. And in which of the following areas of the British Isles and Ireland did you go?  
Base: All non-visitors to Wales n=991

# Reasons for not visiting Wales in 2022

- 'Personal circumstances' was the most common reason given for not visiting Wales in 2022 at 32%, mentioned by more than twice as many non-visitors as the next most popular reasons - 'I was still nervous about travelling due to COVID' (13%) and 'my general health' (12% - both highest amongst retirees). 'I've been before and wanted to try somewhere else' and 'I took an overseas holiday instead' were mentioned by 12% and 11% respectively.

**Figure 39. Reason for not visiting Wales for overnight trip in 2022, Percentage Top 10 reasons, non-Wales visitors**



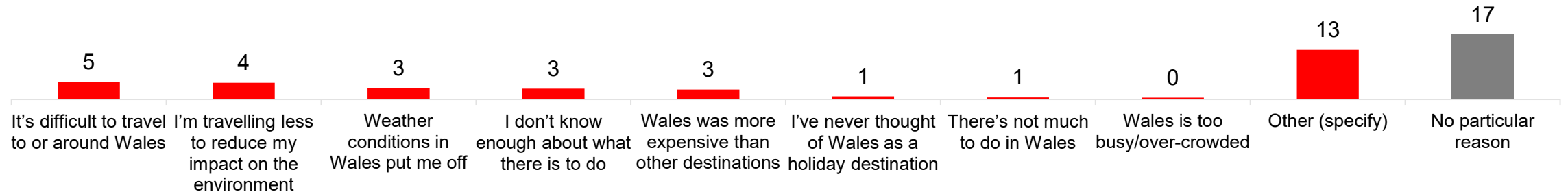
B4. What are the reasons that you didn't visit Wales for a holiday or short break in 2022?

Base: All non-visitors to Wales n=2,125

# Reasons for not visiting Wales in 2022

- A range of other reasons were also mentioned, albeit by a small proportion of non-visitors. Perhaps notably, only 3% stated 'Wales was more expensive than other destinations'.

**Figure 40. Reason for not visiting Wales for overnight trip in 2022, Percentage Bottom 10 reasons, non-Wales visitors**



B4. What are the reasons that you didn't visit Wales for a holiday or short break in 2022?

Base: All non-visitors to Wales n=2,125

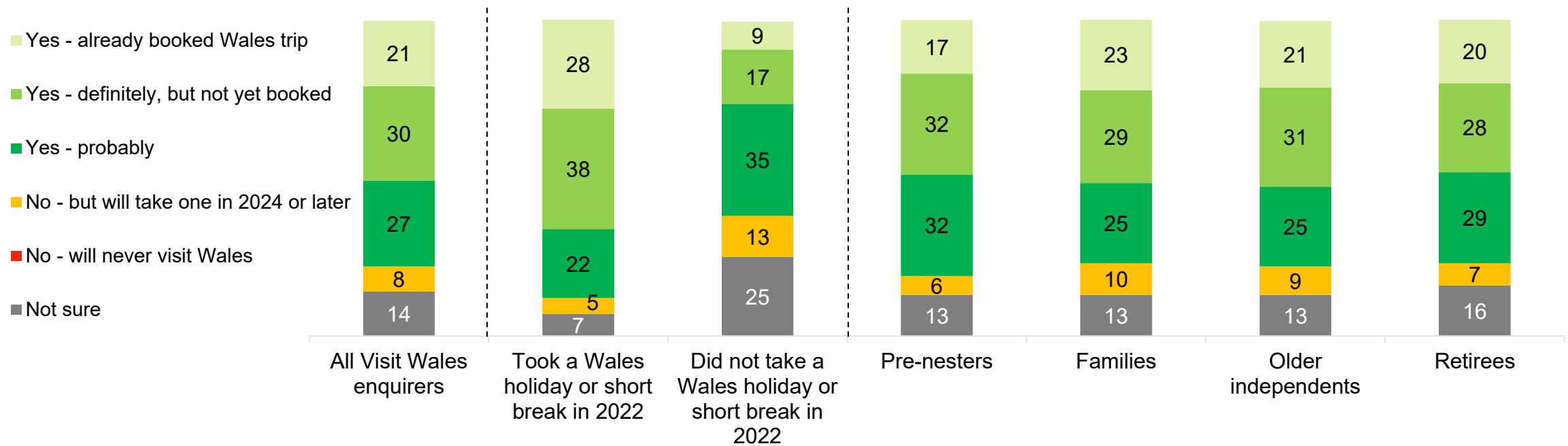
Intention to take a trip  
in Wales in 2023



# Wales overnight trip intention in 2023 and beyond

- Over half (51%) of Visit Wales enquirers have either *already* booked a Wales trip in 2023, or are definitely going but have not yet booked, rising to 66% amongst 2022 trip-takers. Notably, 1 in 4 (26%) of those that did not take a Wales holiday or short break in 2022 have already booked a Wales trip or are definitely planning on taking one in 2023. A small proportion (8%) anticipate taking a Wales trip in 2024 or beyond.
- There is minimal difference in Wales trip intention by life stage, although pre-nesters are the least likely to report that they have already booked or are definitely planning on taking a trip to Wales in 2023.

**Figure 41. Wales visit intention in 2023 and beyond, Percentage, All enquirers, By life stage**



B5. Are you intending to visit Wales for a holiday or short break in 2023?

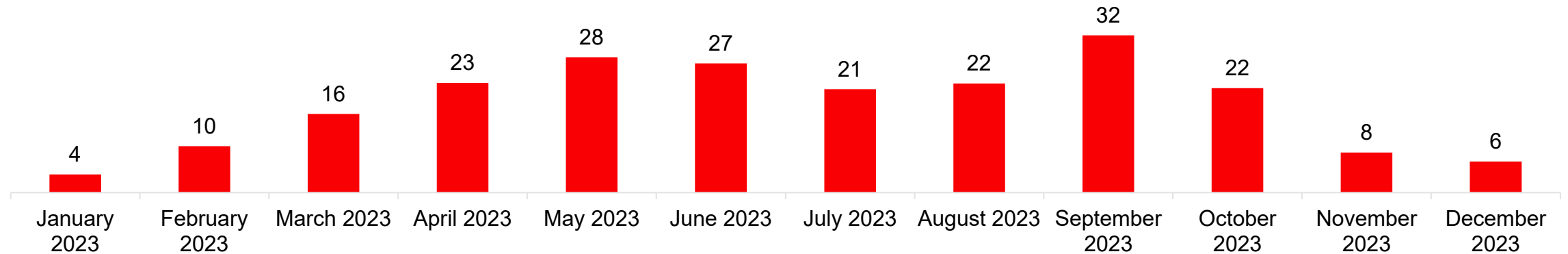
Base: All Visit Wales enquirers n=5,381. Pre-nesters n=472; Families n=524; Older Independents n=2,312; Retirees n=1,976 Please note: Never responses were provided by less than 0.5% of respondents



# Month of intended Wales trip in 2023

- Similar to 2022, Wales 2023 enquirers are most likely to take their trip in September, followed by May and June. There is relatively strong interest in all months with the exception of January to February and November to December.
- As with trips taken in 2022, September trip interest is driven by retirees, with families most likely to take their trip in July and August.

**Figure 42. Month of intended Wales trip in 2023, Percentage, All 2023 Wales trip intenders**



B7. When are you planning to take a holiday or short break in Wales in 2023?

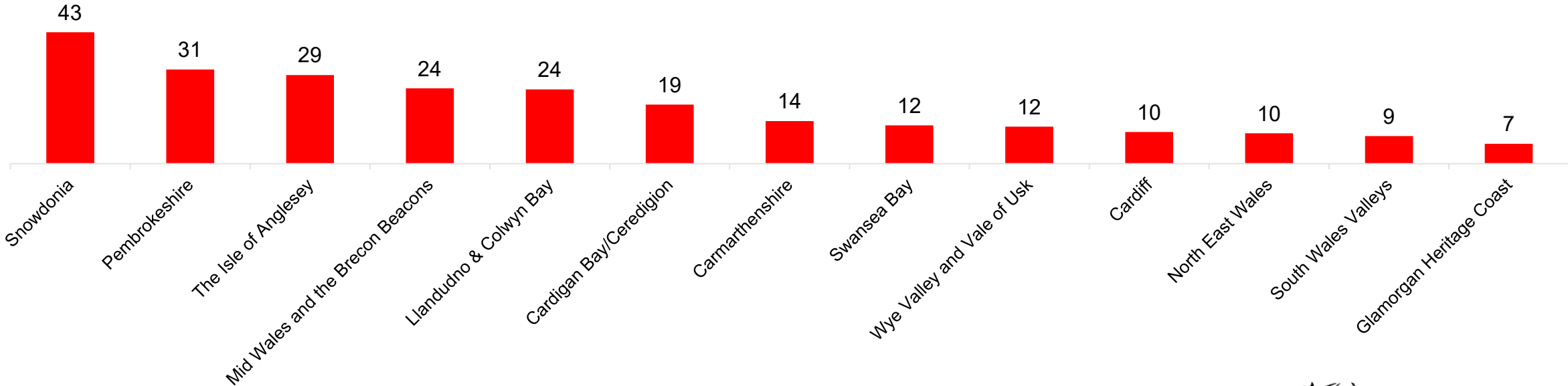
Base: All 2023 Wales trip intenders n=4,180



# Anticipated destination for 2023 Wales trip

- The most popular Wales destination for a 2023 trip is Snowdonia, followed by Pembrokeshire and the Isle of Anglesey.
- Similar to trips taken in 2022, preferred destinations correlate with region of residence – enquirers from the North West of England are most likely to show a preference for North Wales destinations, while enquirers from the South West of England and Wales are more likely to plan on staying in South or West Wales.

Figure 43. Destination for intended Wales trip in 2023, Percentage, All 2023 Wales trip intenders



UKI-B8.Which of these areas do you plan on visiting on your next holiday or short break in Wales in 2023?

Base: All 2023 Wales trip intenders n=4,180

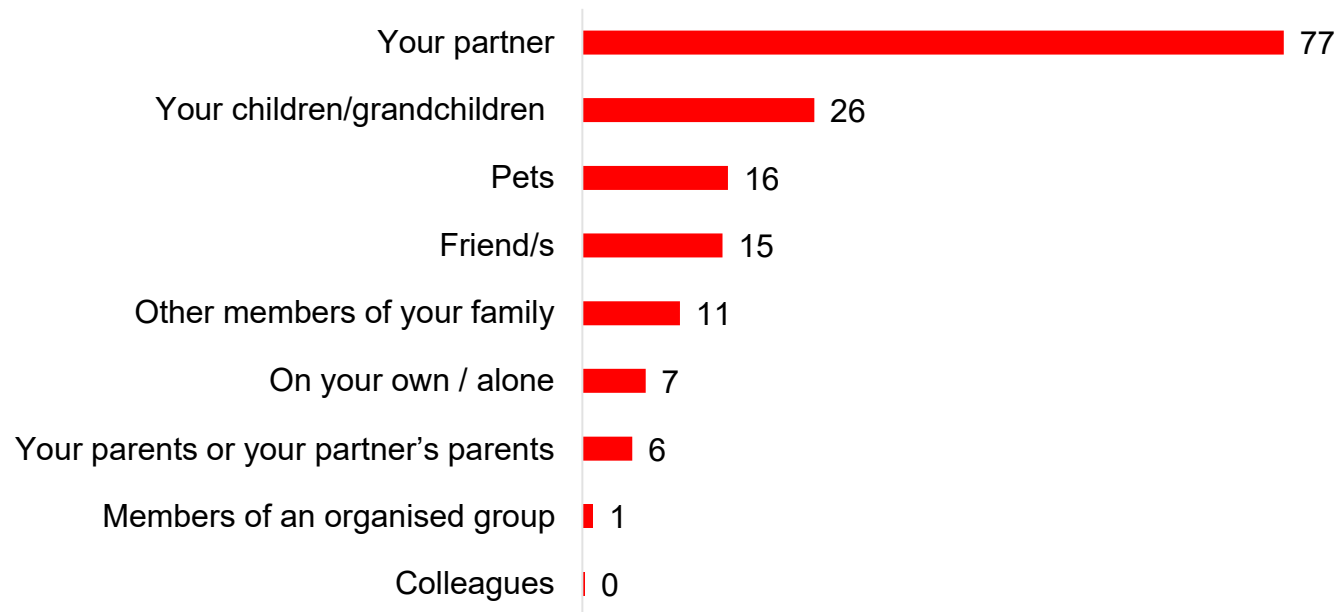




# Visitor party make-up for Wales trip in 2023

- The vast majority (77%) of 2023 trip intenders plan on visiting Wales in 2023 with their partner, with just over 1 in 4 expecting to do so with their children or grandchildren. 1 in 7 expect to take their trip with their pets.
- Unsurprisingly families are the most likely to plan on taking a Wales trip with children. They are also the most likely to travel with 'parents or a partner's parents', suggesting they will be involved in multi-generation trips.

**Figure 44. Visitor party make-up for Wales trip in 2023, Percentage, All 2023 Wales trip intenders**



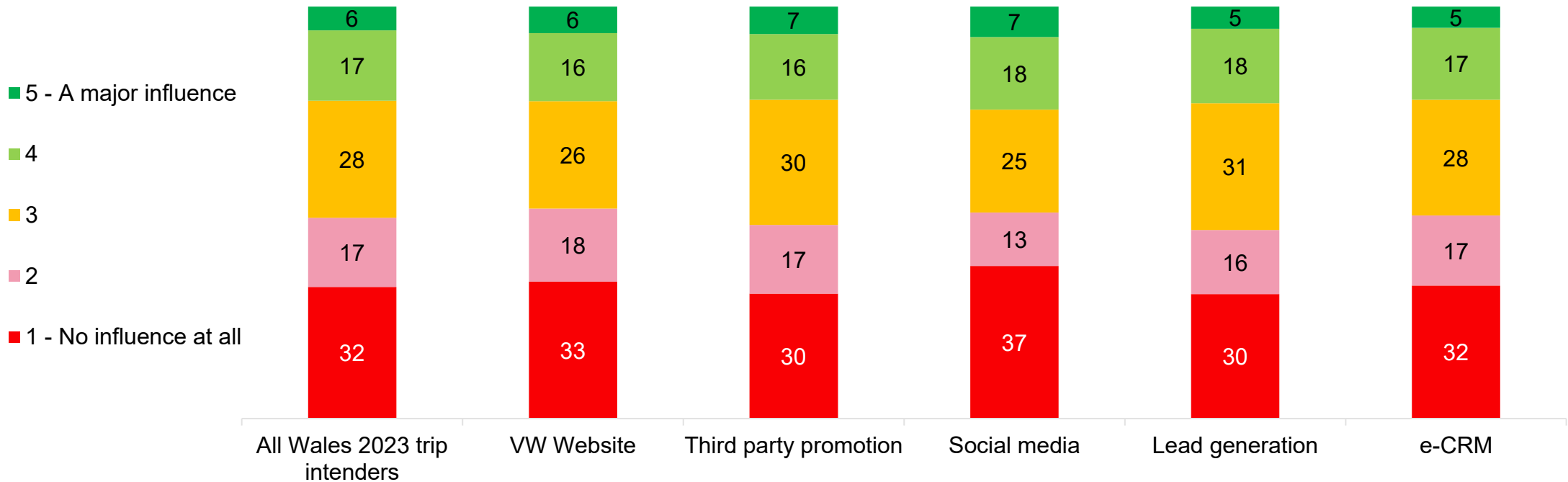
B9. Who, if anyone, is likely to accompany you on your next short break or holiday in Wales?

Base: All 2023 Wales trip intenders n=4,180

# Influence of Visit Wales communications on trip decision

- Around 1 in 4 Wales 2023 trip intenders indicate that Visit Wales communications have already had an influence on their decision to take their 2023 trip – almost identical to the reported influence communications had on 2022 trips. There are minimal differences by sample source.

**Figure 45. Influence of Visit Wales communications on trip decision, Percentage, All 2023 Wales trip intenders, By sample source**



B10. What influence, if any, has Visit Wales communications had on your decision to take a holiday or short break in Wales in 2023? Base: All Wales trip-takers n=4,180. VW Website n=789; Third party promotion n=809; Social media n=108; Lead generation n=520; e-CRM n=1,954

**Appendix 2:  
Statistical significance**



# 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 (5,381)	+/- 0.6%	+/- 1.1%	+/- 1.3%
Wales visitors in 2022 (3,256)	+/- 0.7%	+/- 1.4%	+/- 1.7%
Pre-nester Wales visitors in 2022 (288)	+/- 2.5%	+/- 4.6%	+/- 5.8%
Visitors to Wye Valley and Vale of Usk in 2022 (100)	+/- 4.3%	+/- 7.8%	+/- 9.8%