

Dadansoddi ar gyfer Polisi



Analysis for Policy

SOCIAL RESEARCH NUMBER: 31/2023

PUBLICATION DATE: 28/03/2023



Llywodraeth Cymru
Welsh Government

Visit Wales consumer re-contact survey – USA report (January 2023)

Digital ISBN **978-1-80535-671-4**

© Crown Copyright

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 – USA 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.

For further information please contact:

Research and Insights Team
Visit Wales,
Economy, Treasury and Constitution
Cathays Park
Cardiff
CF10 3NQ
Email: tourismresearch@gov.wales

Contents (click title to jump to chapter)

Chapter	Page number
<u>Background and Methodology</u>	4
<u>Key findings</u>	11
<u>Profile of Visit Wales enquirers</u>	17
<u>2022 trip conversion and relationship with Wales</u>	21
<u>2022 trip characteristics</u>	25
<u>Marketing Impact</u>	38
<u>Reasons for not taking trips to Wales in 2022</u>	43
<u>Intention to take a trip in Wales in 2023</u>	47
<u>Appendix: Statistical significance</u>	52

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 USA (referred to as 'enquirers' throughout the report). Separate reports are available for German and UK & Ireland 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 vacation
- The characteristics of trips taken in Wales and the profile of visitors taking vacations
- 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. 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 19th January and closing on 3rd 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/e-CRM	784
Expedia	466
TOTAL SAMPLE	1,250

From 1,250 invites sent to enquirers, 299 completed survey responses were received, **delivering an overall response rate of 24%.**

An explanation of sample sources

VW Website

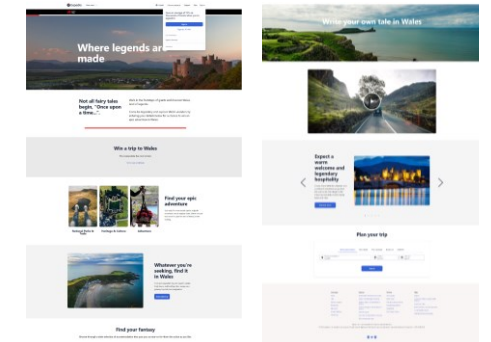
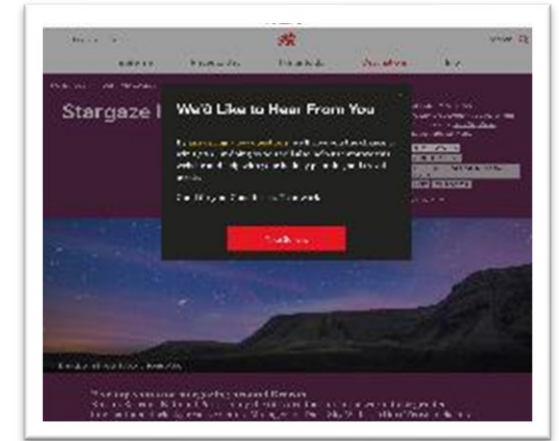
A sample of users of the www.visitwales.com website who completed a short intercept survey across the full calendar year 2022 and who were living in the USA.

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 USA.

Expedia

A sample of users who opted in to receive newsletters from Visit Wales when entering a prize draw on a Expedia's Wales 'Where Legends are Made' microsite site during the World Cup in the calendar year 2022 and who were living in the USA.



Sample considerations/1

It is important to note that the sample used for this research is not representative of the US 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 'vacation 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. Age bias:** The sample also has a strong bias towards older age groups. The wider market has a more even balance.

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 vacation in Wales in 2022
- **Non-visitors to Wales:** Visit Wales enquirers that stated within the survey that they did not take a vacation in Wales in 2022
- **2023 Wales trip intenders:** Visit Wales enquirers that stated within the survey that they intend to take a vacation 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**

To ensure there are sufficient base sizes, US states have been categorised into recognised regions. These are as follows:

- **The South:** Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia
- **The West:** Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming
- **The North East:** Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont
- **The Midwest:** Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin

Key findings



Key findings (1)

Profile of Visit Wales Enquirers

1. Visit Wales enquirers from the USA come from a broad range of states and regions – New York, California and Florida have the highest representation, but only make up just over 1 in 5 enquirers between them – the majority are spread across the rest of the country.
2. Enquirers from the USA tend to belong to 'older' life stages, with older independents and retirees making up just over 4 in 5 enquirers. This is relatively consistent across regions of the USA.
3. Nearly 3 in 5 enquirers belong to social grades AB, while nearly 1 in 4 belong to social grades C1, suggesting a high disposable income for most enquirers. Less than 1 in 5 belong to lower social grades C2DE.

2022 trip conversion and relationship with Wales

1. Around 2 in 5 of Visit Wales enquirers from the USA have taken a vacation in Wales at some point in their lives – 7% do so often, 12% sometimes, and 22% have done so once or twice and might do so again. Enquirers from the West of the USA are the most likely to have taken vacations in Wales.
2. 1 in 6 US-based enquirers visited Wales for a vacation in 2022, taking 1 trip on average. Again, residents of the West of the USA (in particular California) were the most likely to have taken a 2022 trip.
3. Whilst the majority of US enquirers have never taken a vacation to Wales, around 1 in 4 have done so previously but did not take a vacation to Wales in 2022. 1 in 20 USA enquirers visited Wales for the first time in 2022, suggesting that Visit Wales marketing is converting new people in the USA.

Key findings (2)

2022 trip characteristics

1. Wales visits from USA trip-takers were spread relatively evenly between May and August – around 1 in 5 visiting in each of these months. April and September also attracted a relatively high proportion of US visitors – albeit lower than in the peak summer months – whilst very few visited between January to March and October to December.
2. On average US visitors' trip length was 8.5 nights – trips of 8+ nights were the most popular (with just over 2 in 5 taking a trip of this length), although a third took a trip of 4-7 nights and almost 1 in 4 took a trip of 1-3 nights. However, it's possible some of those nights were spent outside of Wales. Four fifths of Wales trip-takers visited elsewhere in the UK and Ireland on their trip – the majority visited somewhere in England, and around a third visited somewhere in Scotland.
3. 60% of US trip-takers stated they 'stayed overnight in several places' in Wales, visiting 1.7 regions of Wales on average. Of these, North Wales was the most popular – the only region visited by the majority of visitors.
4. The main draw for a trip to Wales amongst Wales trip-takers was 'to experience the culture and heritage', reported by 70% of trip-takers. 'Connecting with nature' was also a motivator – 53% reported visiting for this reason. Close to half (45%) were visiting on the strength of a previous visit, whilst 1 in 3 (32%) were drawn to visit by family/friends that live in Wales.
5. 'Trying local food and drink' was the activity that US visitors to Wales in 2022 most commonly reported undertaking on their trip to Wales, reported by just over 4 in 5 (81%). Aligned with the motivation to experience culture and heritage, 'visiting heritage sites or cultural attractions', 'visiting outdoor visitor attractions' and 'learning about local history and culture' were also leading activities undertaken by USA trip-takers. 'Walking, hiking or rambling' was also a popular activity, in line with a desire to connect with nature.
6. 'Hotels or motels' were the preferred accommodation type amongst Wales trip-takers from the USA (47% staying in this category of accommodation) followed by 'guest house/B&B' (at 30%). 2 in 5 (40%) Wales trip-takers booked their accommodation 'directly with an accommodation provider' and 3 in 10 (30%) booked via a 'travel website' – the next most popular booking option. Nearly 1 in 4 booked via a 'homestay website'. Notably, 3 in 10 (30%) of Wales trip-takers stated they found their accommodation on the Visit Wales website.

Key findings (3)

7. Almost 9 in 10 (87%) Wales visitors from the USA rated their experience in Wales as 'excellent', with the remainder (13%) rating it as 'good'. No visitors rated their experience as 'poor'.
8. When assessing individual elements of the trip, Wales trip-takers from the USA were very satisfied with a range of areas. They were most satisfied with the 'quality of the natural environment', 'the welcome they received', the 'customer service', 'the quality of things to do' and 'feeling of safety'. Ratings were lower – although still very positive – for the 'quality of public transport' and the 'cleanliness of the streets'. Dissatisfaction was expressed most strongly around 'the cost of car parking', 'the availability of public toilets', and 'the availability of public transport'.

Key findings (4)

Marketing Impact

1. Wales trip-takers were most likely to have seen or heard about Wales in 2022 through 'word of mouth', with 45% having done so. Around 2 in 5 had seen or heard about Wales through 'promotion or content on a website' (40%), 'promotion or content from an organisation on social media' (38%), and 'reading an article in a newspaper or magazine (38%)'.
2. In terms of specific Visit Wales communications, the Visit Wales website was the channel of communication Wales visitors were most likely to have engaged with in 2022 (78%), followed by e-newsletters (51%). More than 2 in 5 (43%) Wales visitors and 1 in 3 (33%) of Visit Wales enquirers stated they follow Visit Wales on one of their social media channels – Facebook was the most popular of these.
3. Visit Wales communications may have had an impact on the decision to visit Wales in 2022. 15% of trip-takers stated that Visit Wales communications were a major influence on their trip decision, and over a third were either 'considering Wales but had not made a final decision' or 'were not considering Wales', at the end of 2021.
4. 'I visited more places than I originally planned to' was the main way in which Visit Wales communications impacted Wales trips taken in 2022. This was followed by 'I visited a part of Wales I hadn't been to before' and 'I visited Wales outside of the summer season'.
5. Just under 1 in 4 Wales 2023 trip intenders indicated that Visit Wales communications have already had an influence on their decision to take their 2023 trip.

Reasons for not taking trips to Wales in 2022

1. Of the enquirers that did not visit Wales in 2022, a third (32%) were considering going there. Only 13% of non-visitors to Wales in 2022 'went somewhere else in the British Isles or Ireland instead', England generating the most visits. Nearly 1 in 5 (17%) 'went somewhere else abroad' instead, around a quarter (26%) 'booked a vacation in the USA' and just under half (48%) 'did not take a vacation at all'.
2. 'Personal circumstances' was the most common reason given for not visiting Wales in 2022, followed by 'I was still nervous about travelling due to COVID-19' and 'I couldn't afford a trip to Wales'.

Key findings (5)

Intention to take a trip in Wales in 2023

1. 6% of Visit Wales enquirers from the USA have already booked a Wales trip in 2023, with 9% stating they will 'definitely' go but have not booked. A further 18% stated they are 'probably' going. Perhaps notably, nearly 2 in 5 anticipate visiting Wales in 2024 or beyond – more than the proportion that plan a trip in 2023.
2. Wales 2022 enquirers are most likely to take their trip in September 2023 (25%). June is also a popular month (22%) followed by May (18%), August (16%) and July (14%).
3. The most popular Wales destination for a 2023 trip is North Wales (53%), closely followed by South East Wales (including Cardiff) (46%) and South West Wales (44%). Just under 2 in 5 (39%) plan on visiting Mid-Wales.
4. Nearly half (45%) of 2023 trip intenders plan on visiting Wales in 2023 with their partner, with around a quarter expecting to do so alone (24%) or with friends (23%).

Profile of Visit Wales Enquirers



State and region of residence

- Visit Wales enquirers from the USA live in a broad range of states – New York, California and Florida have the highest representation. There is a relatively even spread of enquirers at a regional level, although ‘the South’ has the highest representation (at 30%).

Figure 1. Origin of enquirers by USA state, Percentage Top 10 + other, All enquirers

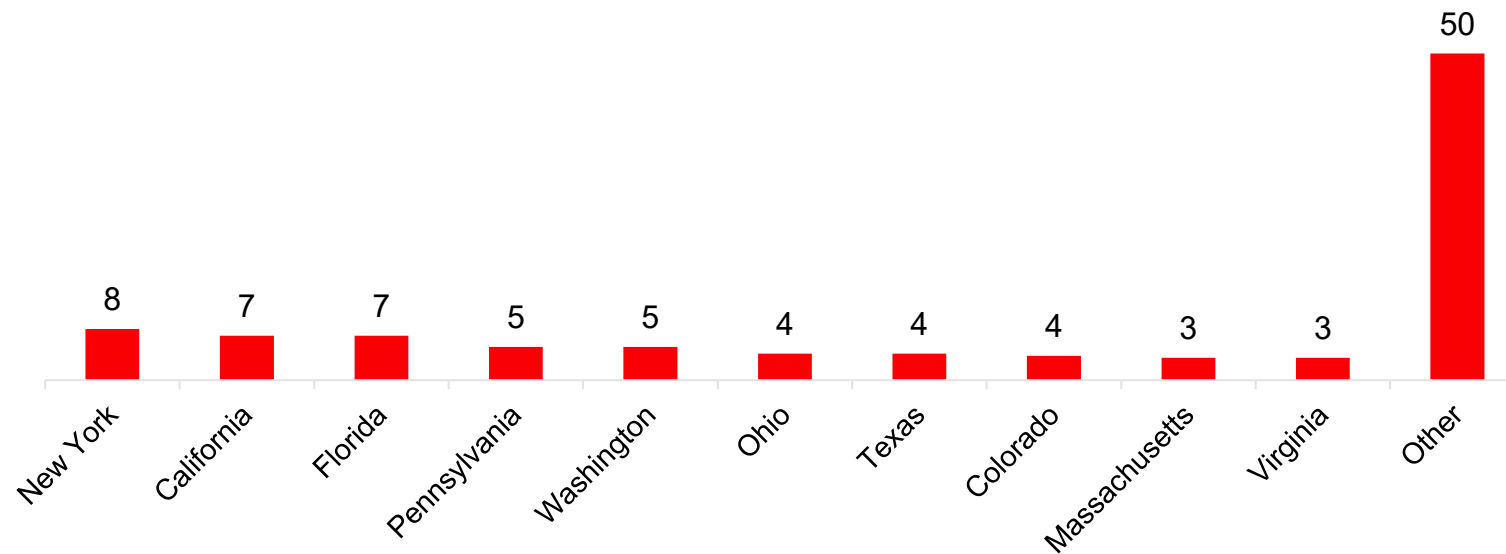
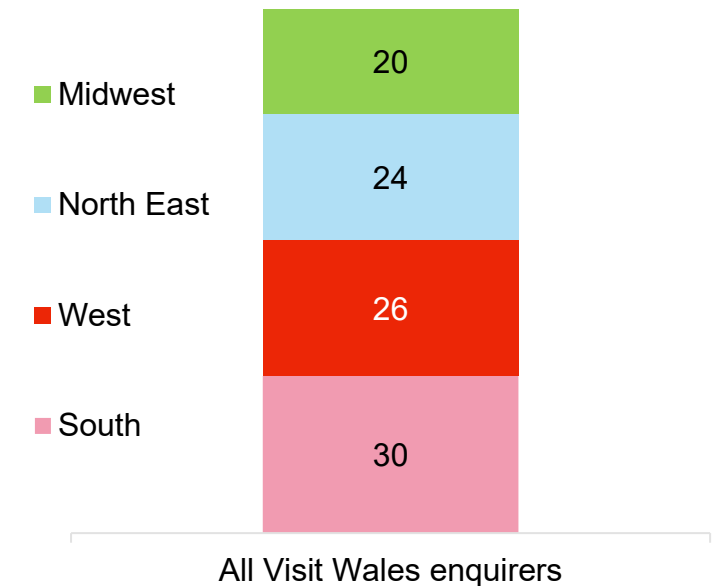


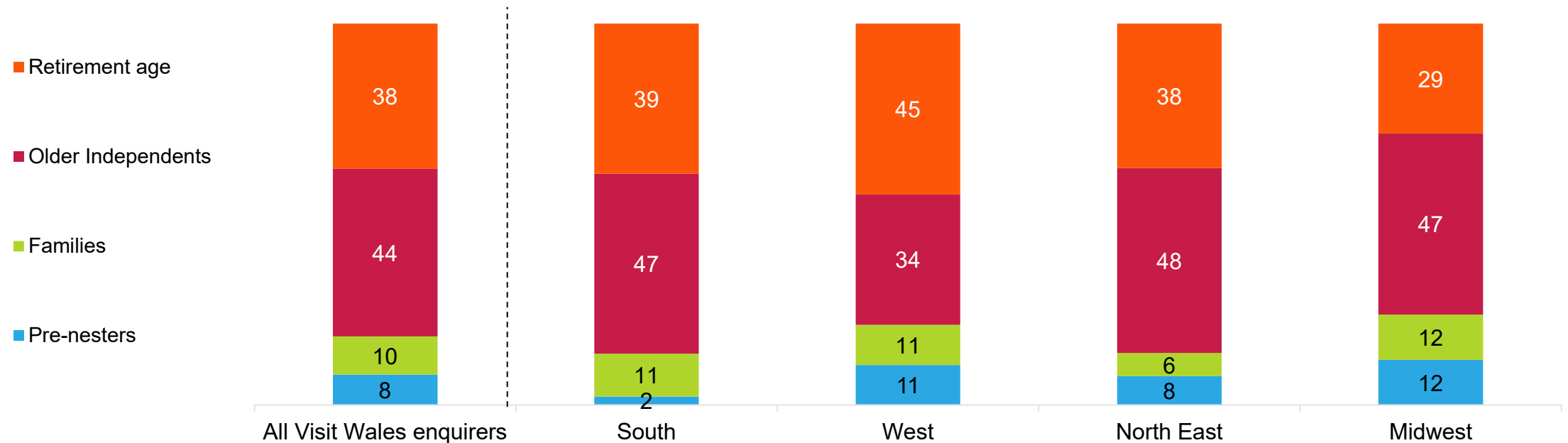
Figure 2. Origin of enquirers by region, Percentage Top 10 + other, All enquirers



Life stage of enquirers

- The vast majority of USA enquirers are made up of older independents (44%) and retirees (38%), with families and pre-nesters making up less than 1 in 5 (18%) between them.
- This picture is relatively consistent across regions of the USA.

Figure 3. Life stage of enquirers, Percentage, All Enquirers and by region



Demographics questions

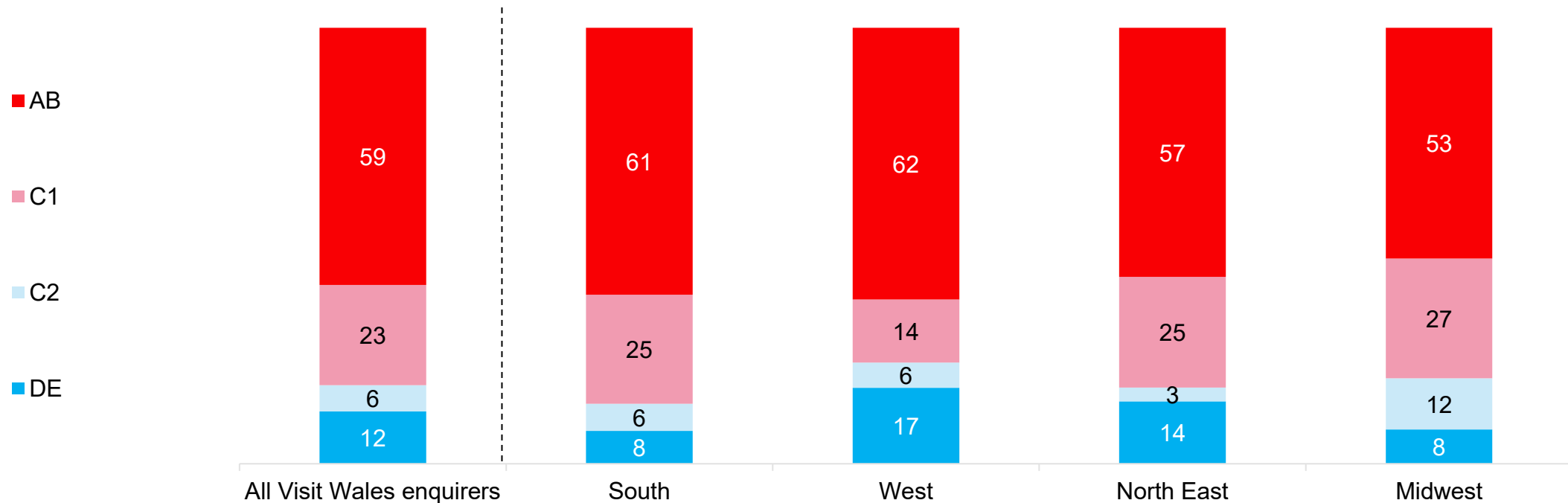
Base: All Visit Wales enquirers excluding 'prefer not to say' life stage: n=290; South n=89; West n=76; North East n=66; Midwest n=59



Social grade of enquirers

- Nearly 3 in 5 (59%) of US enquirers belong to AB social grades, while nearly 1 in 4 (23%) belong to social grade C1. Only a minority (18%) belong to social grades C2DE.
- There is minimal difference across regions of the USA.

Figure 4. Social grade of enquirers, Percentage, All Enquirers and by region



Demographics questions

Base: All Visit Wales enquirers excluding 'prefer not to say' social grade: n=263; South n=80; West n=69; North East n=63; Midwest n=51



2022 trip conversion and relationship with Wales

BVA BDRCC

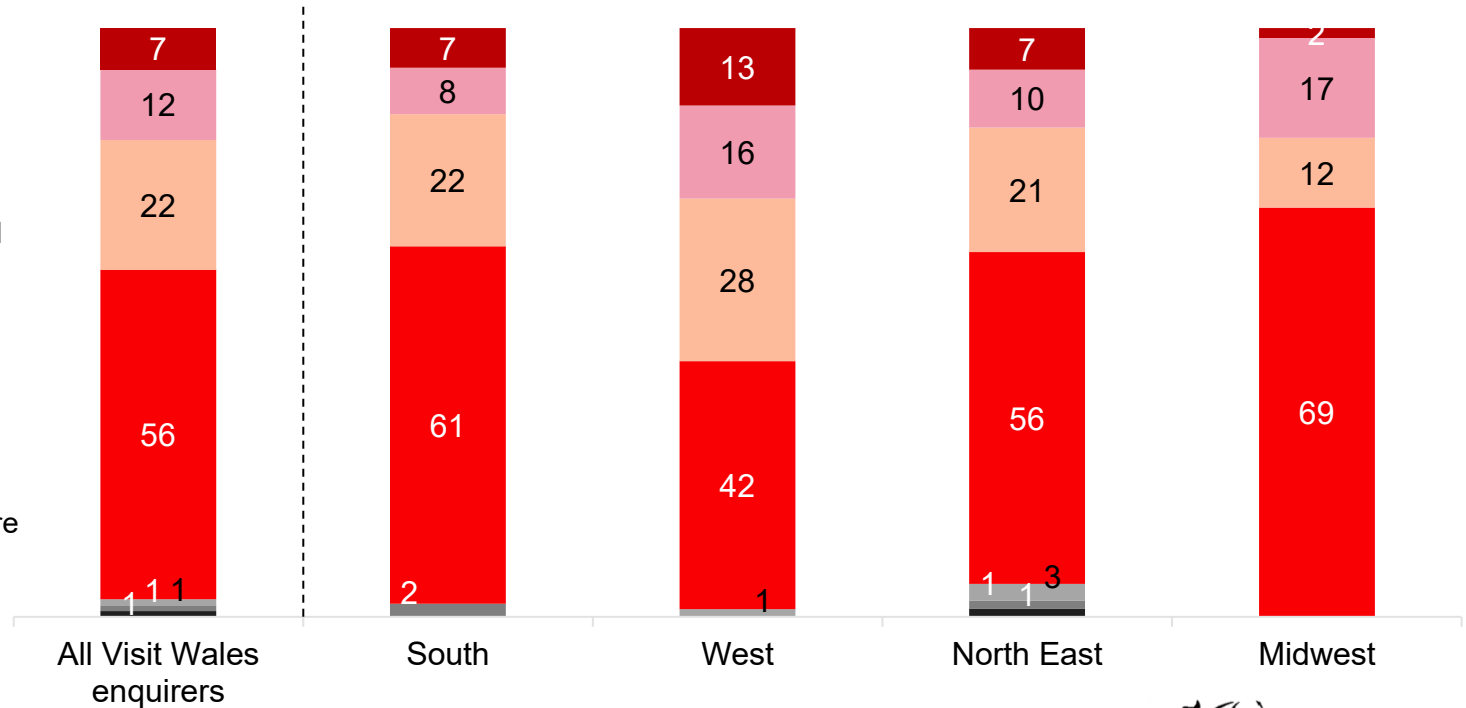


Loyalty of visitation with Wales

- Around 2 in 5 (42%) Visit Wales enquirers from the USA have visited Wales for vacation at some point in their lives – a small proportion (7%) ‘often’ doing so, around 1 in 8 (12%) ‘sometimes’ doing so and nearly a quarter (22%) having done so ‘once or twice before’ and ‘might do so again’. The majority, however, have never been to Wales for a vacation, but would like to do so.
- There is some variation by region of the USA – residents of the ‘West’ (in particular California) are the most likely to have taken a vacation in Wales at some point.

Figure 5. Relationship with Wales, Percentage, All Enquirers and by region

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



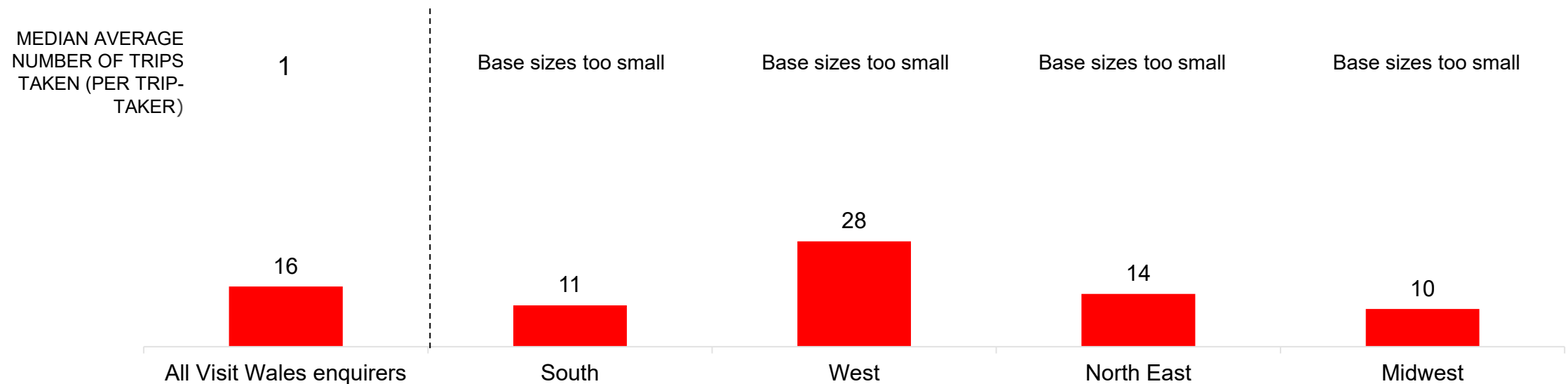
A1. Which of the following statements best applies to you when it comes to visiting Wales? Base: All Visit Wales enquirers n=299; South n=89; West n=76; North East n=71; Midwest n=59



Vacations taken in Wales in 2022

- 1 in 6 (16%) Visit Wales enquirers from the USA took a vacation in Wales in 2022 – highest amongst residents of the West of the USA (again driven by California). The average number of trips taken by visitors to Wales was 1.

Figure 6. Whether took a vacation in Wales in 2022, Average and Percentage, All Enquirers and by region

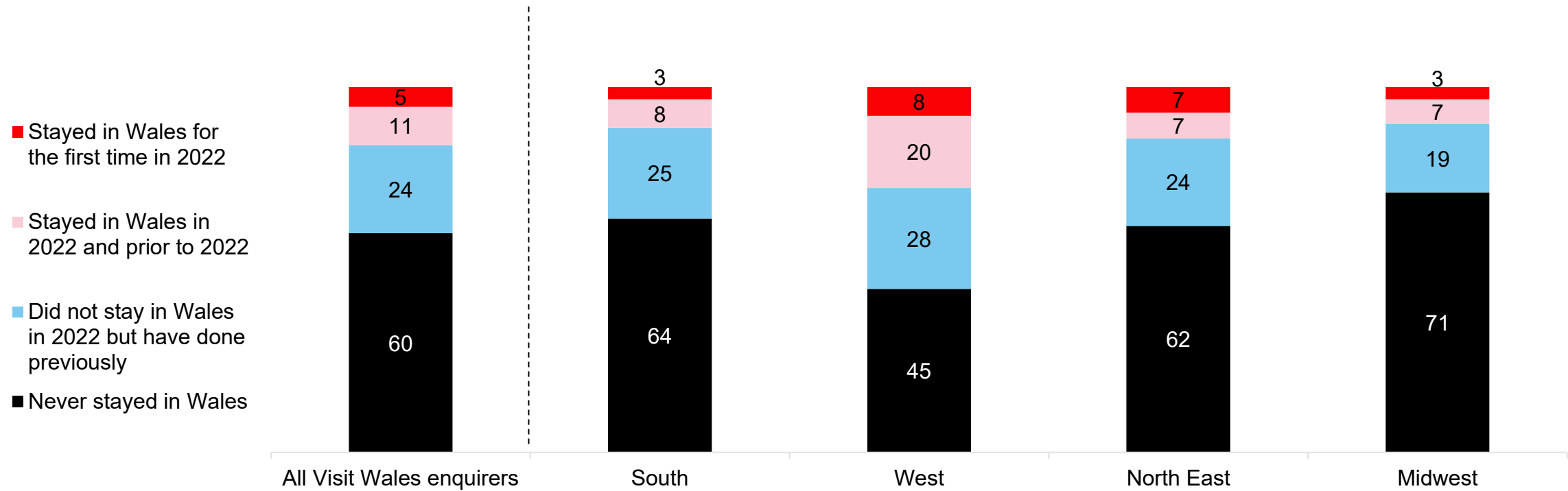


A2a. Did you take vacation in Wales in 2022? Base: All Visit Wales enquirers n=299; South n=89; West n=76; North East n=71; Midwest n=59. A3. How many vacations did you take in Wales in 2022? Base: All 2022 Wales trip-takers n=47 * *Low base sizes, treat with caution

When taken vacation in Wales

- The majority (60%) of US enquirers have never taken a vacation in Wales, whilst around 1 in 4 (24%) did not take a vacation to Wales in 2022 but have done so previously. Around a third of visitors to Wales in 2022 were visiting for the first time, with the remainder having stayed there in 2022 and previously.
- Residents of the West and North East of the USA were most likely to be visiting Wales for the first time in 2022.

Figure 7. When taken vacation in Wales, Percentage, All Enquirers and by region



A2a. Did you take a vacation in Wales in 2022? A2b. Have you taken a vacation in Wales prior to 2022? Base: All Visit Wales enquirers n=299; South n=89; West n=76; North East n=71; Midwest n=59



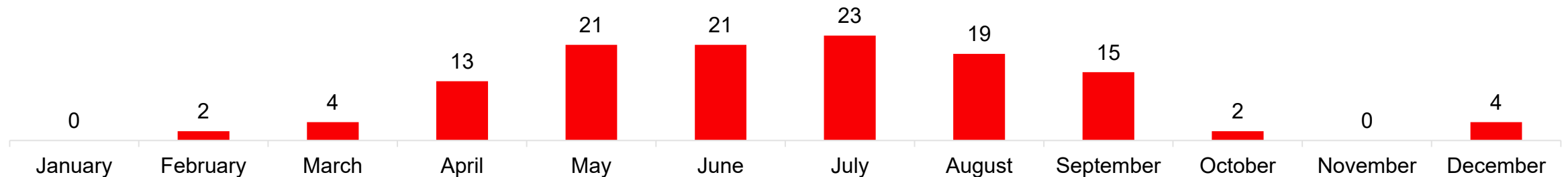
2022 trip characteristics



Month trip taken in Wales in 2022

- Wales visits from USA trip-takers were spread relatively evenly between May and August – around 1 in 5 visiting in each of these months. April and September also attracted a relatively high proportion of US visitors – albeit lower than in the peak summer months – whilst very few visited from January to March and from October to December.

Figure 8. 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 vacation in 2022?

Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Number of nights on Wales trip

- US trip-takers to Wales spent 8.5 nights away from home on average on their trip. Nearly 1 in 4 (23%) stayed for 1-3 nights, just over 1 in 3 (34%) stayed for 4-7 nights, and just over 2 in 5 stayed for 8+ nights.
- On average, there were 2.4 adults per trip party among US trip-takers.

Figure 9. Trip length of Wales overnight stay, Percentage, All 2022 Wales trip-takers

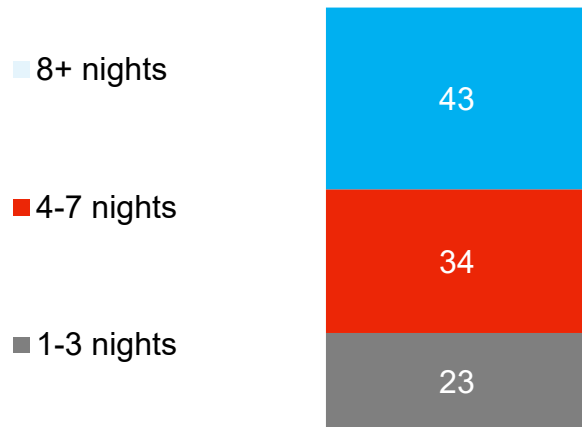


Figure 10. Average trip length of Wales overnight stay, Average, All 2022 Wales trip-takers



A5. On this overnight trip to Wales in [MONTH], how many nights did you stay away for?

Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Visits elsewhere in UK or Ireland

- 4 in 5 (79%) Wales trip-takers from the USA stayed elsewhere in the UK and Ireland as well as staying in Wales. Slightly more trip-takers stayed elsewhere in the UK and Ireland before they visited Wales, rather than after. The vast majority (86%) of these individuals stayed in England, although approximately 1 in 3 (32%) stayed in Scotland.

Figure 11. Visits elsewhere in UK or Ireland as part of the same trip, Percentage, All 2022 Wales trip-takers

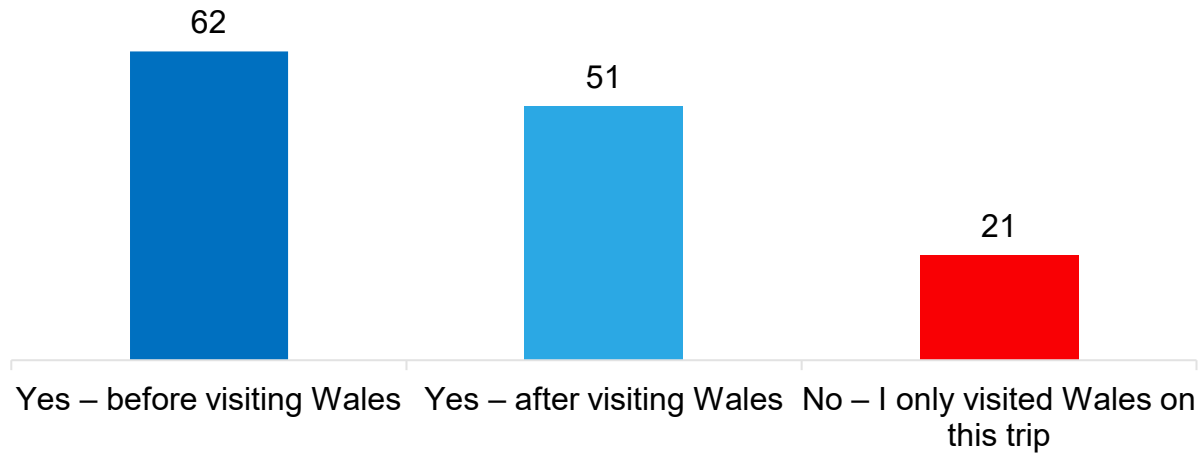
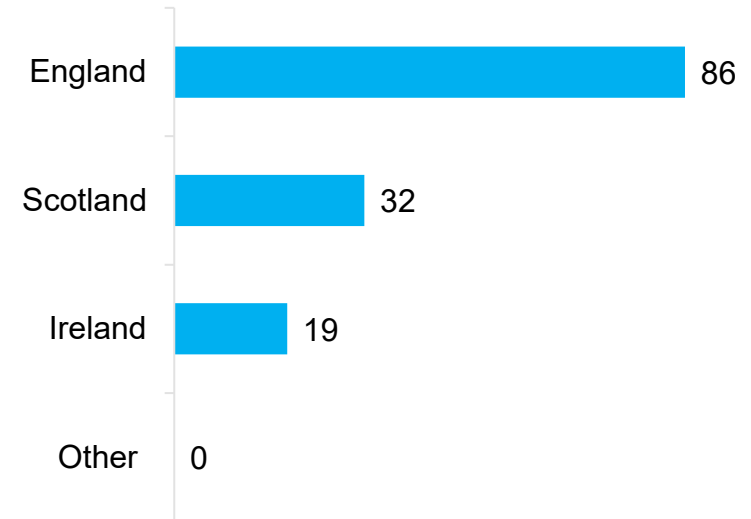


Figure 12. Where else stayed in UK or Ireland, Percentage, All 2022 Wales trip takers that stayed elsewhere



A8. Did you stay overnight in any other parts of the UK or Ireland as part of this same trip? Base: All Wales trip-takers n=47* A8b. Where else, if anywhere, in the UK and Ireland did you stay overnight on this trip? Base: All 2022 Wales trip-takers that stayed elsewhere n=37* *Low base sizes, treat with caution

Where stayed in Wales during trip in 2022

- North Wales was the region of Wales attracting the highest number of overnight visits from US trip-takers, with almost 3 in 5 (57%) staying there, followed by South West Wales (at 43%).
- 2 in 5 (40%) of overnight visitors to Wales from the US stayed in one location on their trip, with 3 in 5 (60%) staying overnight in several places.

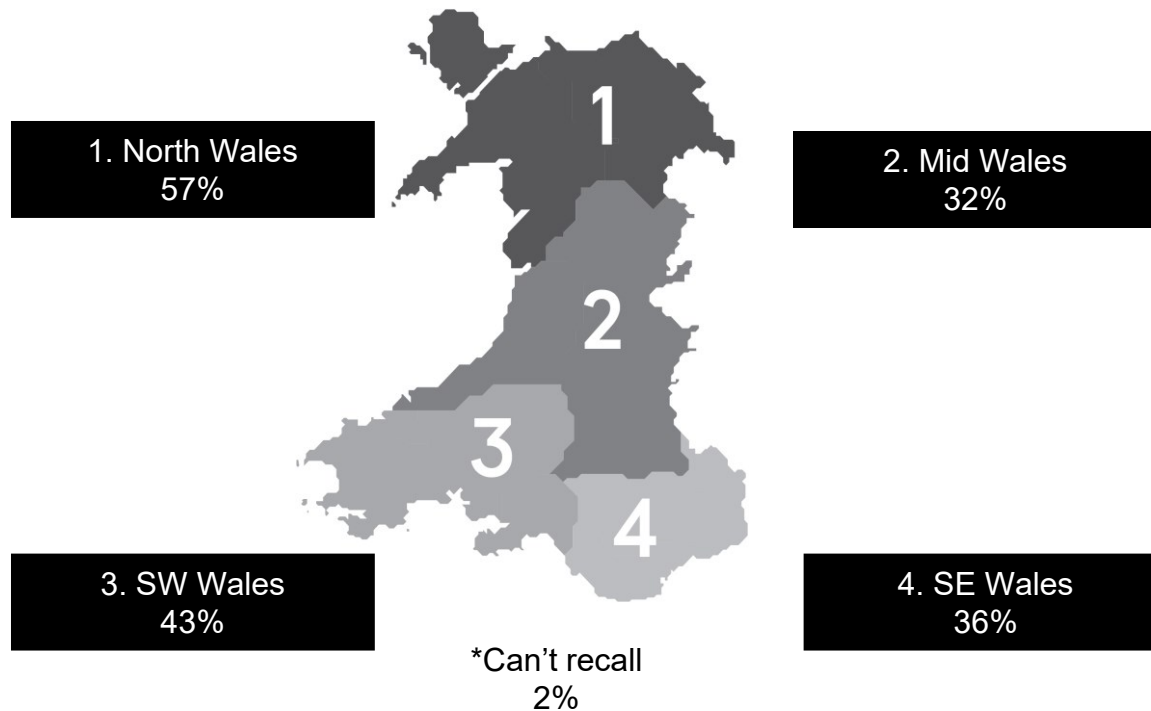
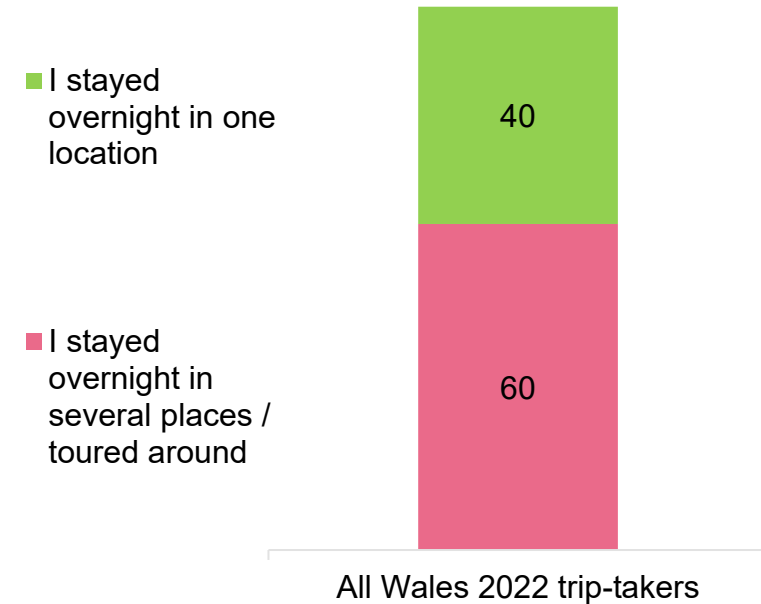


Figure 13. Type of trip taken on Wales trip, Percentage, All 2022 Wales trip-takers



A12. Where in Wales did you stay overnight on this trip in [MONTH]? A13. Which of the below best describes your trip in Wales in [MONTH]? Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Reasons for choosing Wales as a destination in 2022

- A number of motivations were cited by US visitors for choosing Wales as a vacation destination – 7 in 10 (70%) stating they went ‘to experience the culture and heritage’, and just over half (53%) because they wanted ‘to connect with nature/be outdoors’. Close to half (45%) were visiting on the strength of a previous visit, whilst 1 in 3 (32%) were drawn to visit by family/friends who live in Wales.
- A range of other reasons were provided, albeit by a smaller proportion of visitors. Both ‘adventure or an active vacation’ and ‘to get away from it all and have a rest’ were cited by almost 1 in 4 (23%), and 1 in 5 (19%) cited wanting ‘to go somewhere with great food and drink’.

Figure 14. Reasons for choosing Wales as a destination, Percentage, All 2022 Wales trip-takers

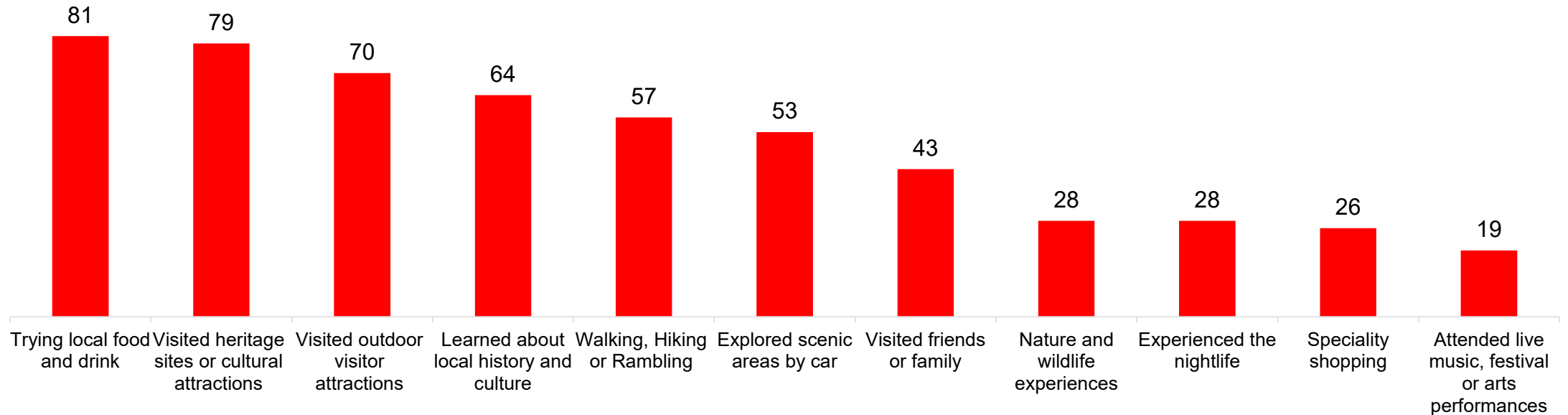


A7. Which, if any, of the following were the main factors that made you choose Wales as a destination for this vacation in [MONTH]? Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Trip behaviour on Wales trip in 2022 – Top 11

- ‘Trying local food and drink’ was the activity that US visitors to Wales in 2022 most commonly reported undertaking on their trip to Wales, reported by just over 4 in 5 (81%). Aligned with a motivation ‘to experience culture and heritage’, ‘visiting heritage sites or cultural attractions’, ‘visiting outdoor visitor attractions’ and ‘learning about local history and culture’ were also leading activities undertaken by US visitors.
- Other activities with high engagement included ‘walking, hiking or rambling’, ‘exploring scenic areas by car’ and ‘visiting friends or family’.

Figure 15. Activities conducted on Wales trip, Percentage, Top 11, All 2022 Wales trip-takers



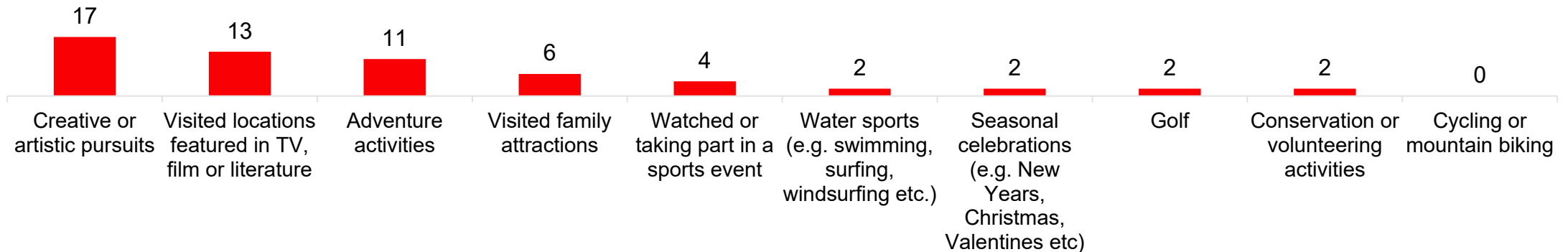
A14. Which, if any, of the following did you do on this trip in Wales in [MONTH]?

Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Trip behaviour on Wales trip – Bottom 10

- A range of other activities were conducted by a more niche proportion of Wales visitors. For example, nearly 1 in 5 undertook ‘creative or artistic pursuits’, and 1 in 7 ‘visited locations featured in TV, film or literature’.

Figure 16. Activities conducted on Wales trip, Percentage, Bottom 10, All 2022 Wales trip-takers



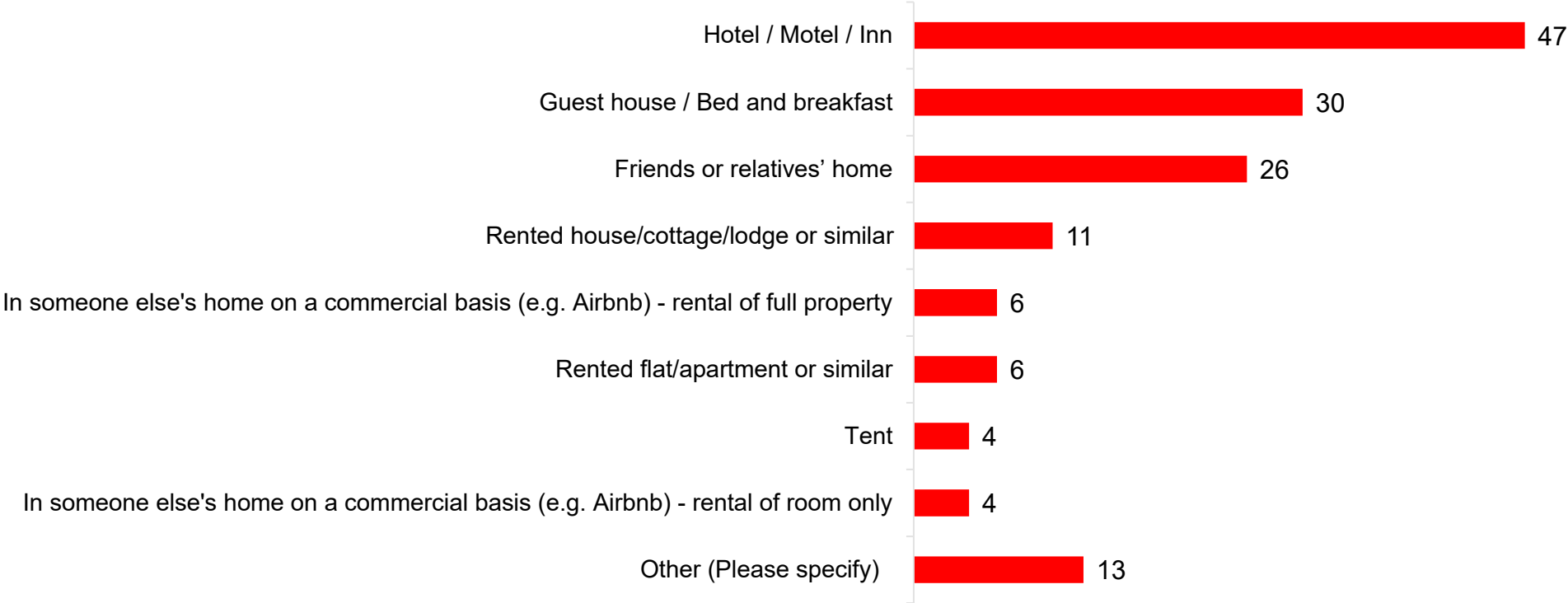
A14. Which, if any, of the following did you do on this trip in Wales in [MONTH]?

Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Accommodation stayed in during Wales trip in 2022

- 'Hotels or motels' were the preferred accommodation type amongst Wales trip-takers in 2022 (47% staying in this category) followed by 'guest house/B&B' (at 30%). A range of other accommodation types were also chosen, including 'friends' or relatives home' (26%) and 'rented house/cottage/lodge' (11%).

Figure 17. 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=47* *Low base sizes, treat with caution

All responses under 3% are combined into 'other'.



How accommodation was booked for Wales trip in 2022

- 2 in 5 (40%) Wales trip-takers from the USA booked their accommodation 'directly with an accommodation provider' and 3 in 10 (30%) booked via a 'travel website' – the next most popular booking option. Just under a quarter (23%) booked via a 'homestay website'.
- Notably, 3 in 10 (30%) of Wales trip-takers stated they found their accommodation on the Visit Wales website.

Figure 18. How accommodation was booked for Wales trip, Percentage, All 2022 Wales trip-takers

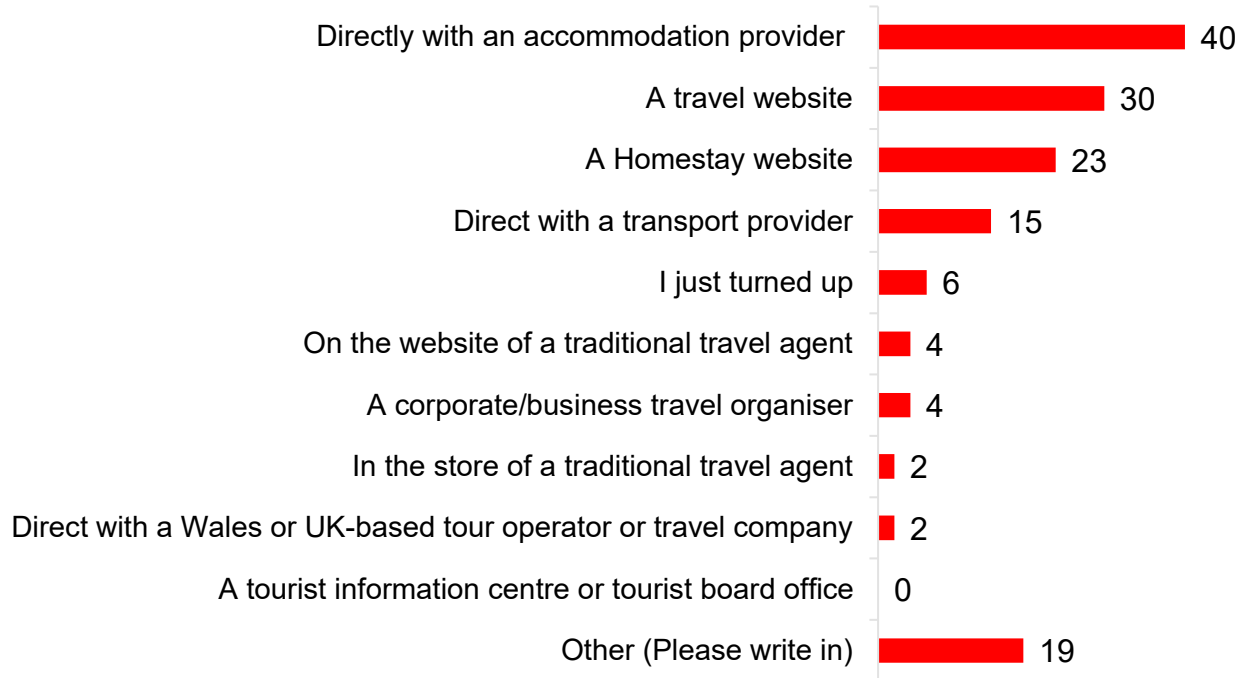
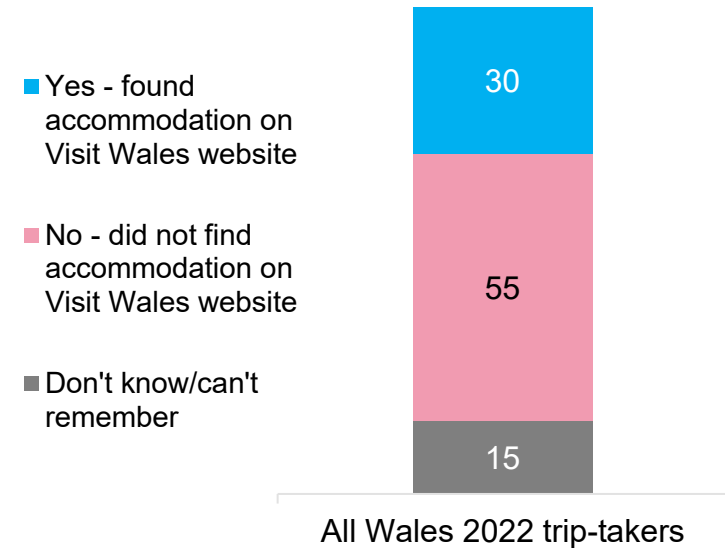


Figure 19. Whether found accommodation on Visit Wales website, Percentage, All 2022 Wales trip-takers

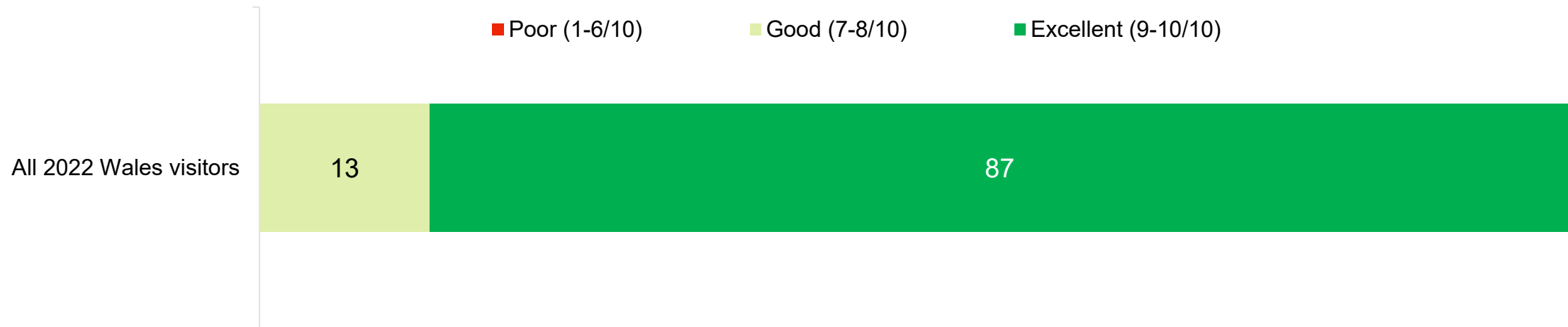


A9. How did you book your accommodation for this trip to Wales? A10. Did you find information or contact details for the accommodation you stayed in on the Visit Wales website? Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Rating of experience staying in Wales

- Almost 9 in 10 (87%) US visitors to Wales rated their experience in Wales as 'excellent', with the remainder (13%) rating their experience as 'good'. No visitors rated their experience as 'poor'.

Figure 20. Rating of experience staying in Wales, Percentage, All 2022 Wales trip-takers



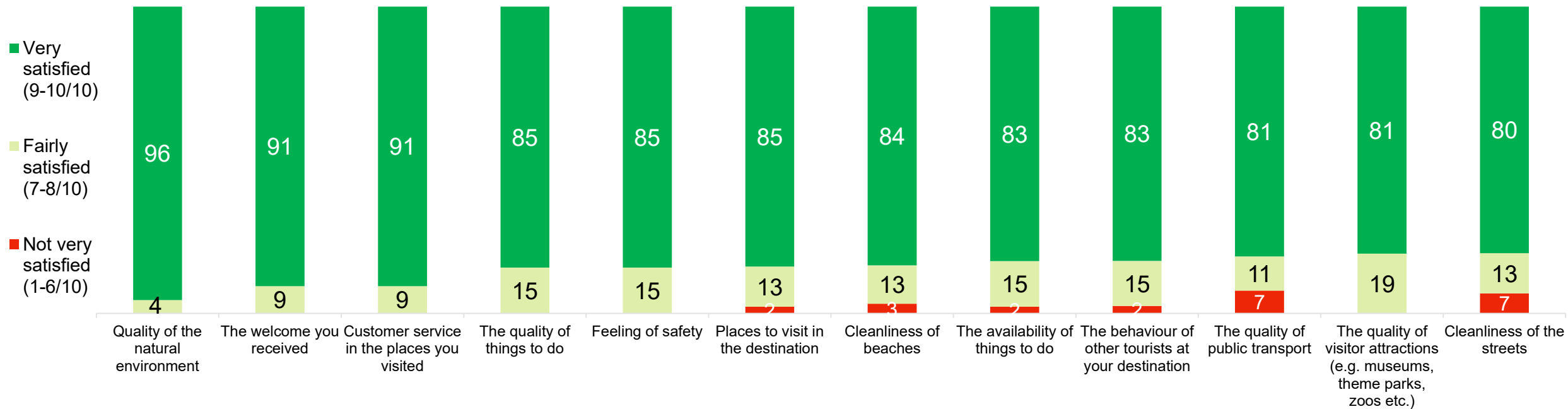
A15. Now going back to your overnight trip in Wales in [MONTH], how would you rate your experience overall?

Base: All 2022 Wales trip-takers n=47. *Low base sizes, treat with caution

Satisfaction with different elements of the Wales experience

- When assessing individual elements of the trip, Wales trip-takers from the USA were very satisfied with a range of areas. They were most satisfied with the 'quality of the natural environment', 'the welcome they received', the 'customer service', 'the quality of things to do' and 'feeling of safety'. Ratings were lower – although still very positive – for the 'quality of public transport' and 'cleanliness of the streets'.

Figure 21. Satisfaction with different elements of the Wales visit experience, Percentage, Top 12, All 2022 Wales trip-takers



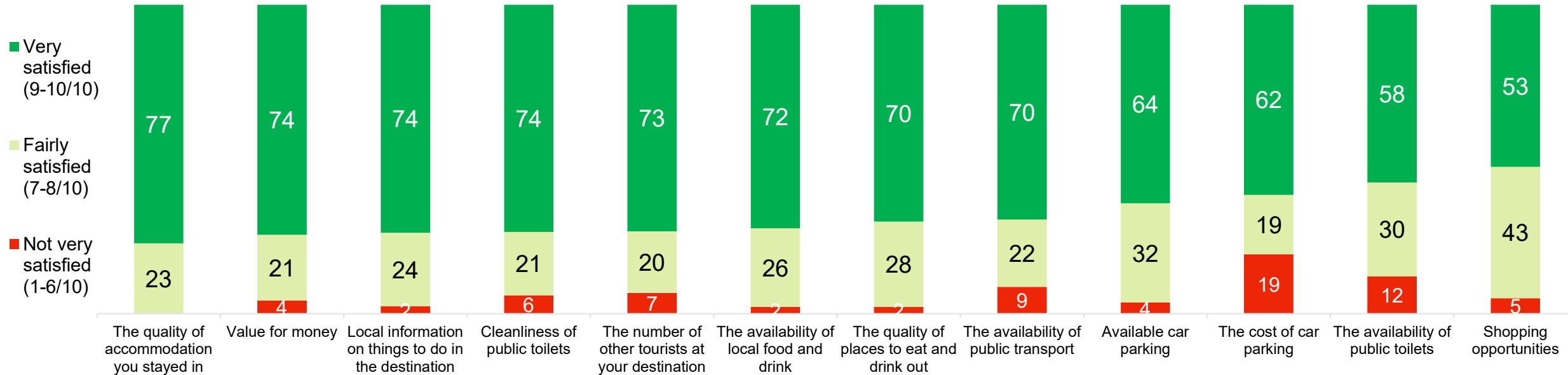
A16/17. How satisfied or dissatisfied were you with the following aspects of your trip in Wales in [MONTH]?
 Base: All 2022 Wales trip-takers n=47* *Low base sizes across all statements, treat with caution. NA responses removed. 'Being pet friendly' and 'Accessibility for people with a disability / long-term illness' removed due to small base sizes



Satisfaction with different elements of the Wales experience

- Although all areas were rated positively by the majority, the strongest dissatisfaction was expressed for 'the cost of car parking', 'the availability of public toilets', and 'the availability of public transport'.

Figure 22. Satisfaction with different elements of the Wales visit experience, Percentage, Bottom 12, All 2022 Wales trip-takers



A16/17. How satisfied or dissatisfied were you with the following aspects of your trip in Wales in [MONTH]?
 Base: All 2022 Wales trip-takers n=47* *Low base sizes across all statements, treat with caution. NA responses removed. 'Being pet friendly' and 'Accessibility for people with a disability / long-term illness' removed due to small base sizes



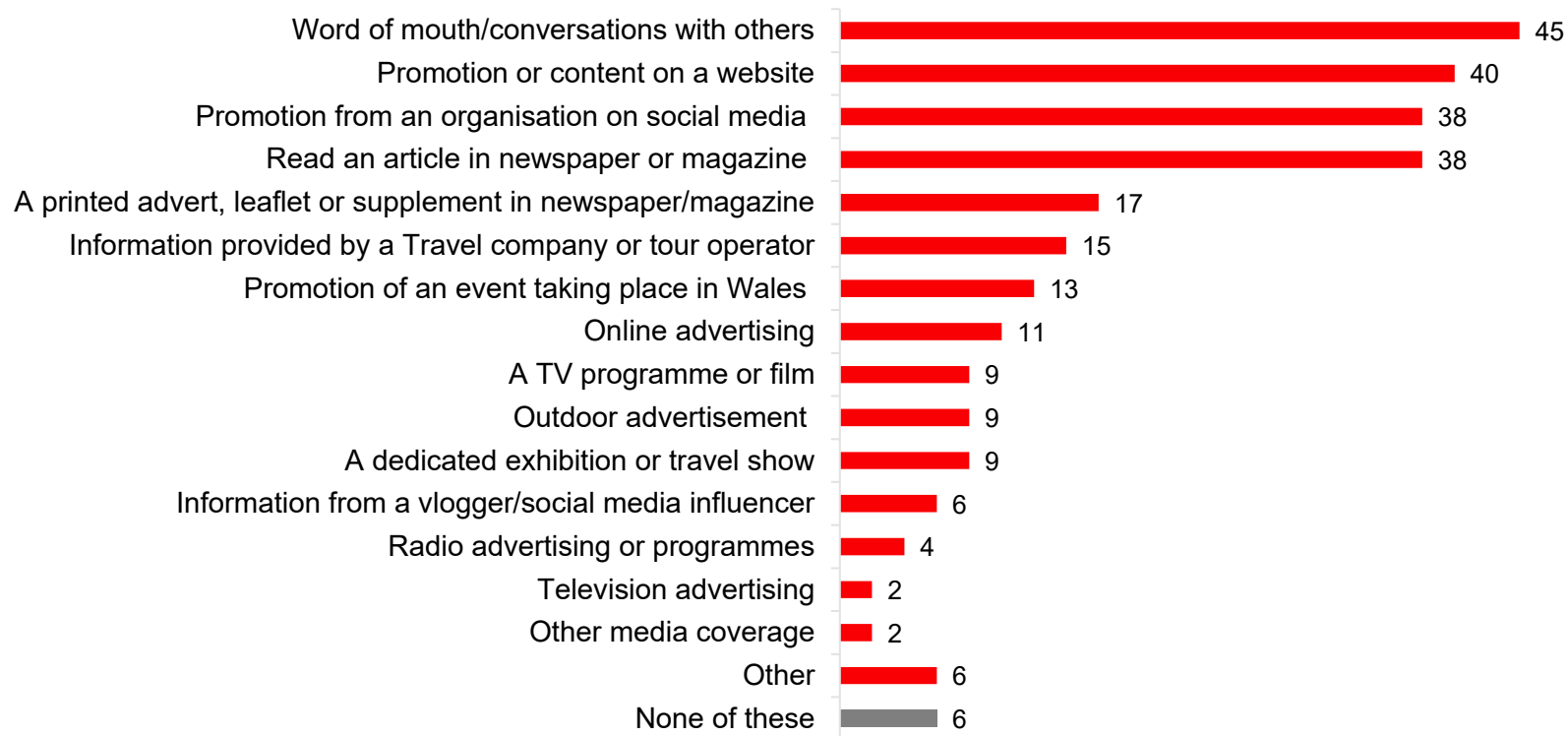
Marketing Impact



Ways in which seen or heard about Wales in 2022

- Wales trip-takers were most likely to have seen or heard about Wales in 2022 through ‘word of mouth’, with 45% having done so. Around 2 in 5 had seen or heard about Wales through ‘promotion or content on a website’ (40%), ‘promotion or content from an organisation on social media’ (38%), and ‘reading an article in a newspaper or magazine’ (38%). Wales trip-takers also heard about Wales through a range of other sources – for example, close to 1 in 5 reported having seen a ‘printed advert or leaflet’ (17%) and ‘information provided by a travel company or tour operator’ (15%).

Figure 23. Ways in which seen or heard about Wales in 2022, Percentage, All 2022 Wales trip-takers



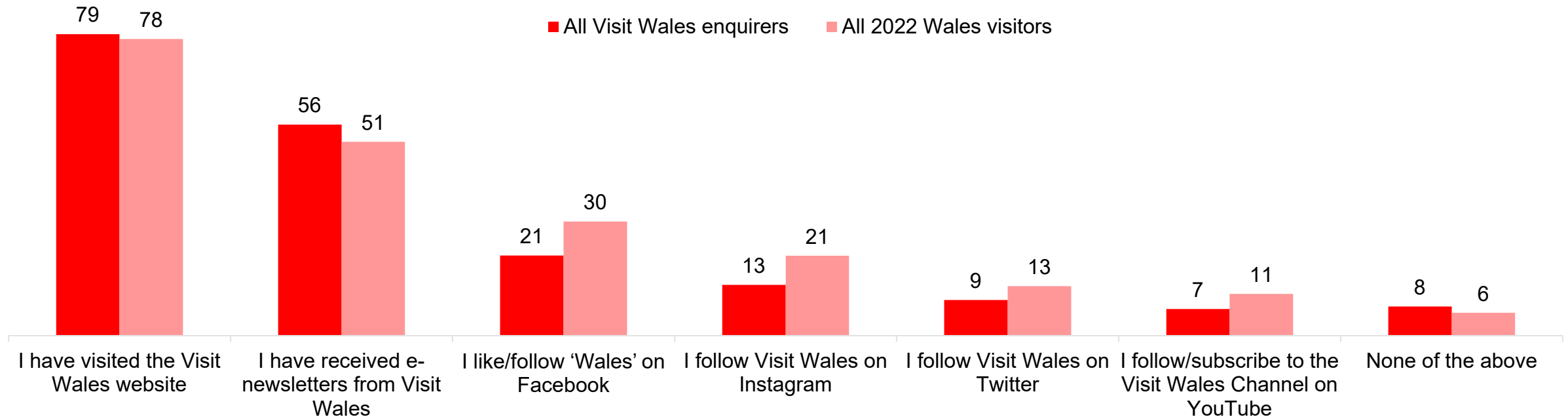
A18. Thinking about marketing and communications which, if any, of the following did you see or hear about Wales during 2022? Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution



Engagement with Visit Wales marketing and communications

- The Visit Wales website was the channel of communication Wales visitors were most likely to have engaged with in 2022 (78%), followed by e-newsletters (51%). More than 2 in 5 (43%) Wales visitors and 1 in 3 (33%) of Visit Wales enquirers stated that they follow Visit Wales on one of their social media channels – Facebook was the most popular of these.

Figure 24. Engagement with Visit Wales marketing and communications, Percentage, All Enquirers



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=299; All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Influence of Visit Wales communications

- 15% of Wales visitors stated that Visit Wales communications was a major influence (4-5 out of 5) on their decision to take their vacation in Wales.
- By the end of 2021, 3 in 5 (60%) Visit Wales trip-takers had already decided to take a vacation in Wales in 2022. However, over a third were either 'considering Wales but had not made a final decision' or 'were not considering Wales', indicating the influence of Visit Wales communications in driving a visit.

Figure 25. Influence of Visit Wales communications on trip decision, Percentage, All 2022 Wales trip-takers

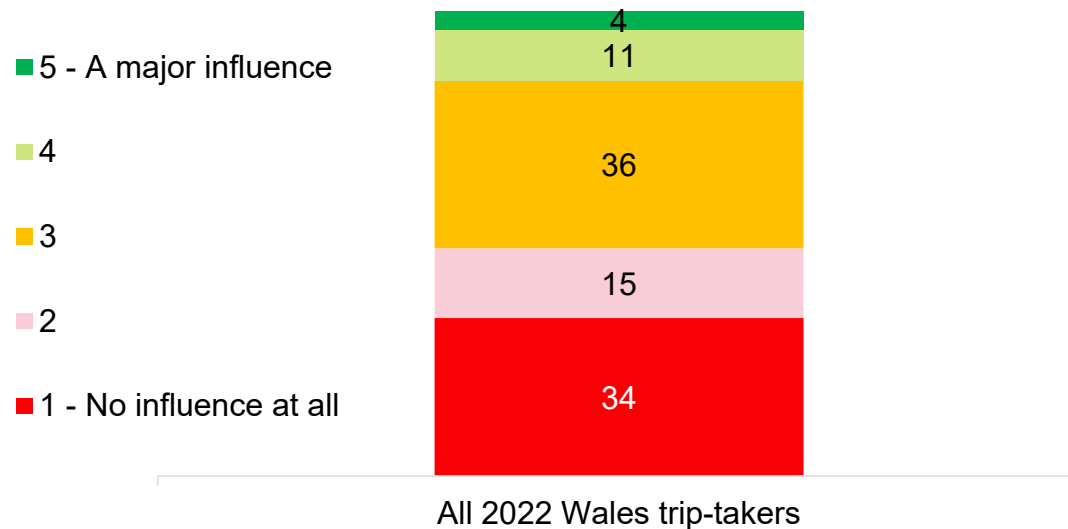
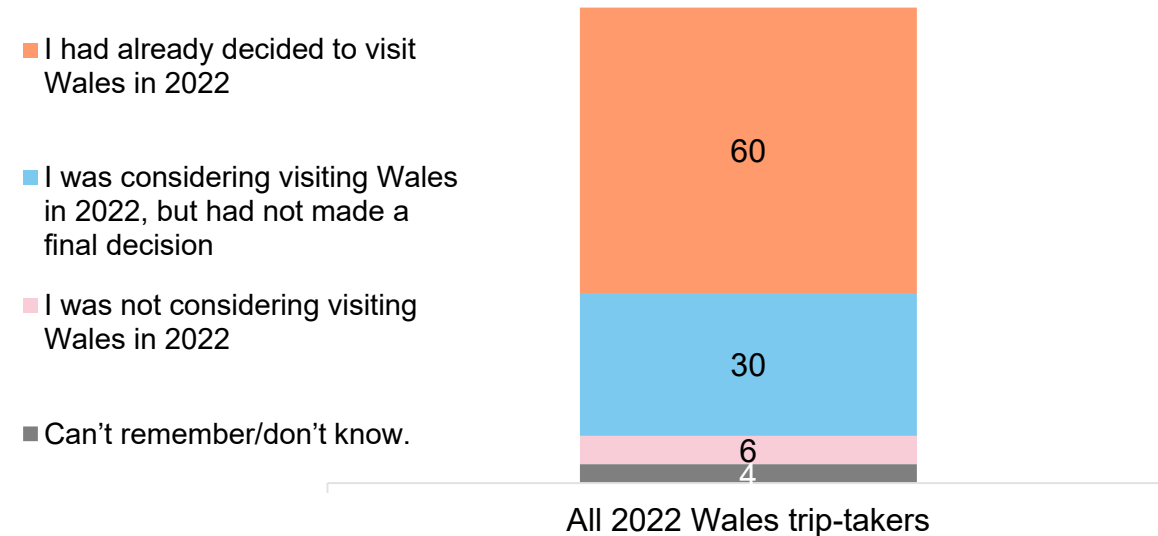


Figure 26. Mindset around visiting Wales at the end of 2021, Percentage, All 2022 Wales trip-takers

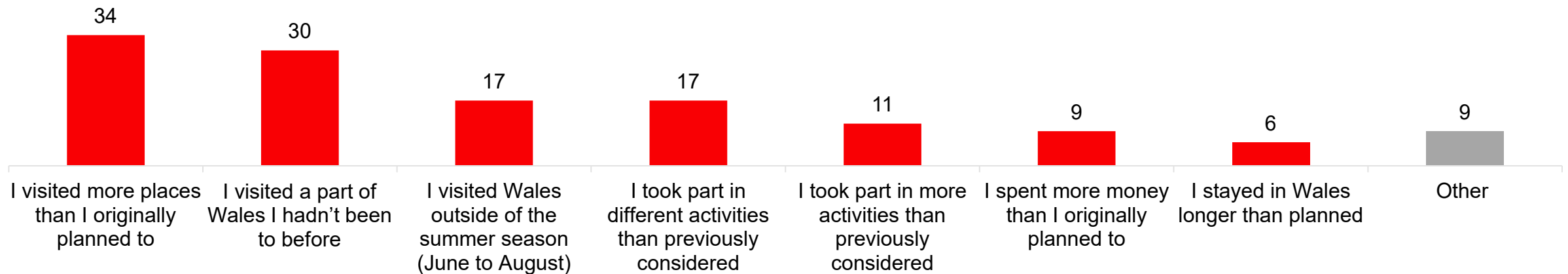


A22. What influence, if any, did the Visit Wales communications have on your decision to take your vacation? A24. Finally in this section, thinking back to the end of 2021, which of these statements best describes your plans at that time to visit Wales in 2022? Base: All 2022 Wales trip-takers n=47* *Low base sizes, treat with caution

Ways in which Visit Wales communications impacted trip

- 'I visited more places than I originally planned' was the main way in which Visit Wales communications impacted Wales trips taken in 2022 (34%). This was closely followed by 'I visited a part of Wales I hadn't been to before' (30%).
- Just under 1 in 5 (17%) were impacted by Visit Wales communications to visit Wales outside of the summer season or to take part in different activities than they had previously considered. Around 1 in 10 spent more money than originally planned.

Figure 27. 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=47* *Low base sizes, treat with caution



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, just under a third (32%) were considering going there.
- Nearly 1 in 5 (17%) of non-visitors to Wales in 2022 'went somewhere else abroad' instead. Around a quarter (26%) 'booked a vacation in the USA' and just under half (48%) 'did not take a vacation at all'.

Figure 28. Wales visiting intentions by non-visitors to Wales, Percentage, All non-visitors to Wales

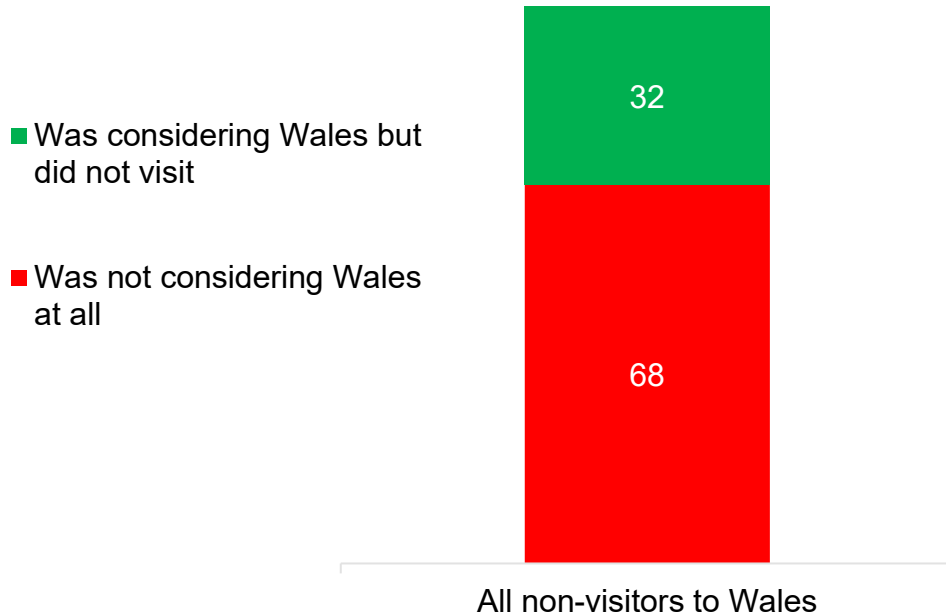


Figure 29. Other destination visiting intentions by non-visitors to Wales, Percentage, All non-visitors to Wales

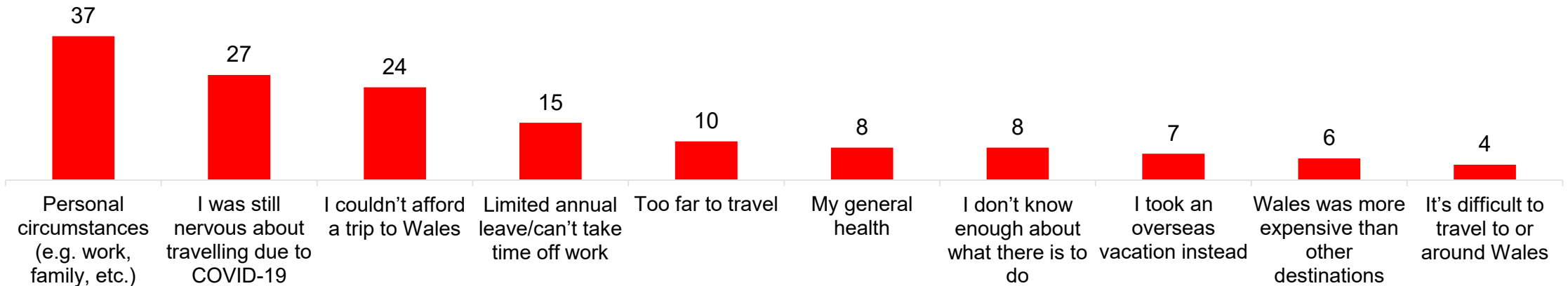


B1. You mentioned that you did not take a vacation in Wales during 2022. Were you considering a trip in Wales in 2022 at any stage? B2. Did you go somewhere else instead of Wales or did you not take a vacation at all? Base: All non-visitors to Wales n=252

Reasons for not visiting Wales in 2022

- ‘Personal circumstances’ was the most commonly reported reason for not visiting Wales in 2022, with over a third of non-visitors (37%) citing this. Around a quarter reported that they were ‘still nervous about travelling due to COVID-19 (27%)’ or ‘unable to afford a trip to Wales’ (24%). 15% said that they didn’t visit Wales in 2022 due to ‘limited annual leave/can’t take time off work’.

Figure 30. Reason for not visiting Wales for overnight trip in 2022, Percentage Top 10 reasons, All non-Wales visitors



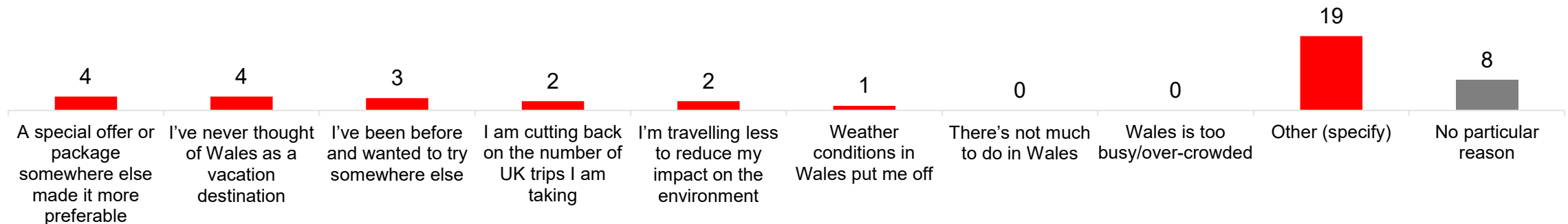
B4.What are the reasons that you didn't visit Wales for a vacation in 2022?

Base: All non-visitors to Wales n=252

Reasons for not visiting Wales in 2022

- A small number of US enquirers also cited other reasons for not visiting Wales, including 'a special offer or package somewhere else made it more preferable' (4%) and 'I've never thought of Wales as a vacation destination' (4%).

Figure 31. Reason for not visiting Wales for overnight trip in 2022, Percentage Bottom 10 reasons, All non-Wales visitors



B4. What are the reasons that you didn't visit Wales for a vacation in 2022?

Base: All non-visitors to Wales n=252

Intention to take a trip in Wales in 2023



Wales overnight trip intention in 2023 and beyond

- 6% of Visit Wales enquirers from the USA have already booked a Wales trip in 2023, with 9% stating they will 'definitely' go but have not booked. A further 18% stated they are 'probably' going. Perhaps notably, nearly 2 in 5 anticipate visiting Wales in 2024 or beyond.
- Although the West of the USA indexed the highest for trips taken in 2022, enquirers from the South of the USA are most likely to exhibit intention to visit Wales for a vacation in 2023.

Figure 32. Wales visit intention in 2023, Percentage, All enquirers



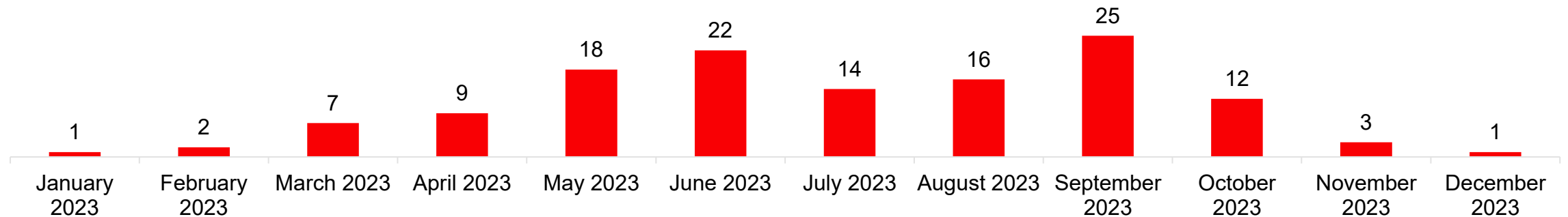
B5. Are you intending to visit Wales for a vacation in 2023? Base: All Visit Wales enquirers n=299
 South n=89; West n=76; North East n=66; Midwest n=59. Note: among all visit Wales enquirers, 'never' is below 0.5% at an overall level so is not shown. For all regions other than 'South', the proportion stating 'never' is 0%



Month of intended Wales trip in 2023

- Wales 2022 enquirers are most likely to take their trip in September 2023 (25%). June is also a popular month (22%) followed by May (18%), August (16%) and July (14%).
- US enquirers show less interest in the off-peak months of January to April and November to December.

Figure 33. Month of intended Wales trip in 2023, Percentage, All 2023 Wales trip intenders



B7. When are you planning to take a vacation in Wales in 2023?
Base: All 2023 Wales trip-intenders n=99



Anticipated destination and visitor party make-up for 2023 Wales trip

- The most popular Wales destination for a 2023 trip is North Wales (53%), closely followed by South East Wales (including Cardiff) (46%) and South West Wales (44%). Just under 2 in 5 (39%) plan on visiting Mid-Wales.
- Nearly half (45%) of 2023 trip intenders plan on visiting Wales in 2023 with their partner, with around a quarter expecting to do so alone (24%) or with friends (23%).

Figure 34. Destination for intended Wales trip in 2023, Percentage, All 2023 Wales trip intenders

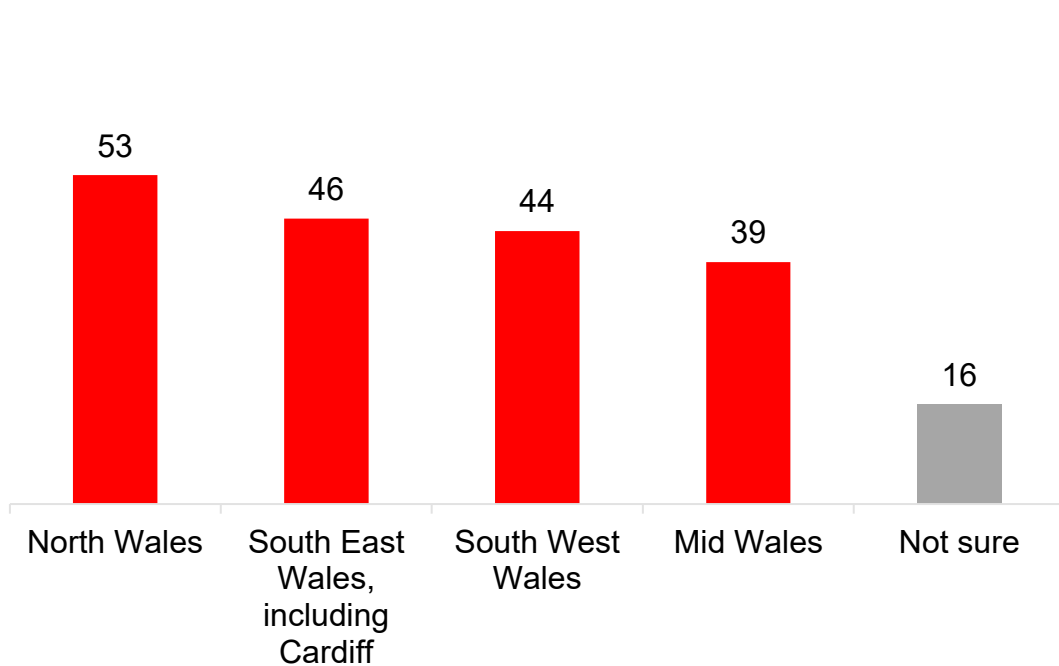
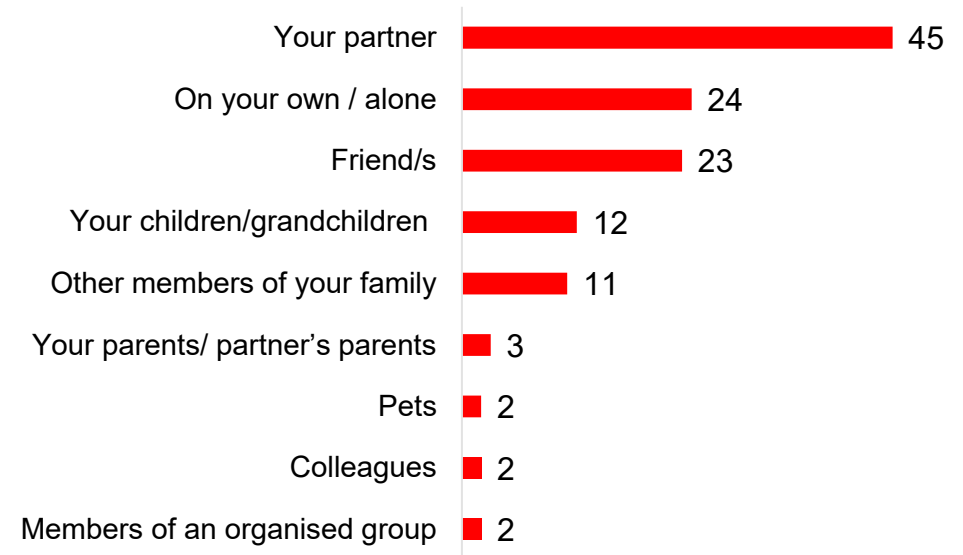


Figure 35. Visitor party make-up for Wales trip in 2023, Percentage, All 2023 Wales trip intenders

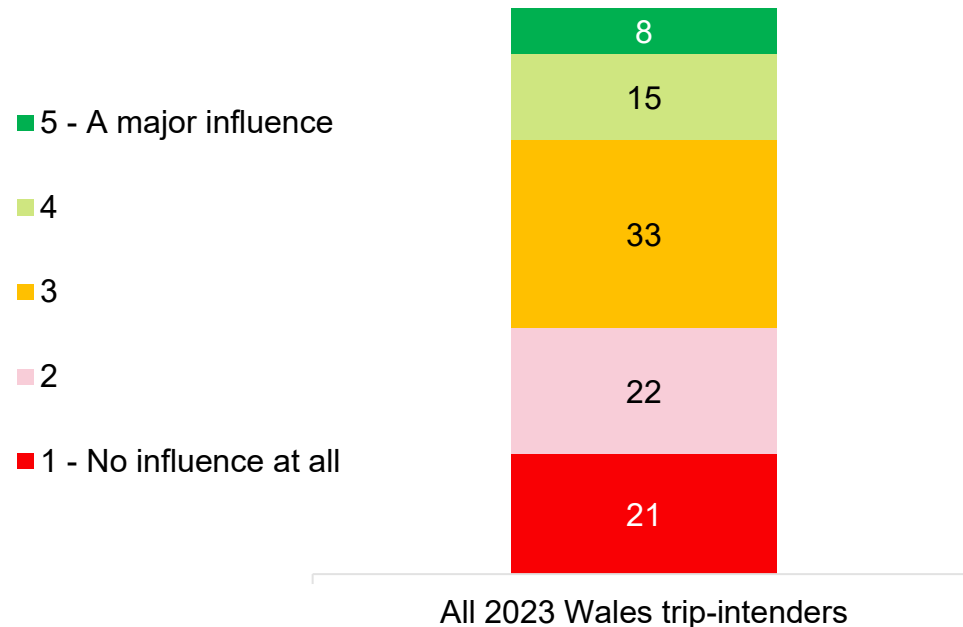


B8. Which of these areas do you plan on visiting on your next vacation in Wales in 2023? B9. Who, if anyone, is likely to accompany you on your next vacation in Wales? Base: All 2023 Wales trip-intenders n=99

Influence of Visit Wales communications on 2023 trip decision

- Just under a quarter (23%) of Wales 2023 trip intenders indicate that Visit Wales communications have already had an influence on their decision to take a 2023 trip. It's perhaps worth noting that the influence on 2023 trips is larger than the influence on 2022 trips, which may suggest that marketing on the US market has a more long-term reach.

Figure 36. Influence of Visit Wales communications on trip decision, Percentage, All 2023 Wales trip intenders



B10. On a scale of 1 to 5 where 1 means 'no influence at all' and 5 means 'a major influence', what influence, if any, has Visit Wales communications had on your decision to take a vacation in Wales in 2023? Base: All 2023 Wales trip-intenders n=99

Appendix
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 (299)	+/- 2.5%	+/- 4.5%	+/- 5.7%
Wales visitors in 2022 (47)	+/- 6.2%	+/- 11.4%	+/- 14.3%
Wales intenders in 2023 (99)	+/- 4.3%	+/- 7.9%	+/- 9.8%