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Visit Wales Tourism Market Demand Report – France May 2023

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Mae’r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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

For further information please contact:

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

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Background and Methodology

Background

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

- The factors influencing holiday and short break choice
- Types of destination and experiences favoured on holidays and short breaks
- Associations with UK holiday destinations
- Wales as a destination
- Future visits to Wales
- Barriers to taking holidays or short breaks in the UK and reasons for not planning to visit Wales in the next few years
- Engagement with Visit Wales information channels and marketing
- The impact of the World Cup on perceptions of Wales
- Profiling and demographics

Methodology

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

- Must be a holiday or short break decision-maker
- Must be seriously considering taking a holiday or short break in the UK in the next few years.

Fieldwork took place from 10th May to 23rd May 2023.

There were 1,007 completed surveys. The first 300 responses to the survey were nationally representative of the French population by age, gender and region of residence. This allowed the researchers to understand the nationally representative breakdown of the French holiday market. The survey was then sampled and weighted by age, gender and region of residence in line with the nationally representative breakdown.

The survey took 20 minutes to complete on average.

Please note that in some instances percentages do not sum to 100%, and this is due to rounding.

Definitions used within this report (1)

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

- **The French holiday market:** The total survey sample. Residents of France who are seriously considering a holiday or short break in the UK in the next few years
- **Wales trip intenders**: Residents of France who are definitely or probably intending to take a holiday or short break in Wales in the next few years.

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)

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

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

The question used to derive these is *"In this section, we are going to show you a series of paired statements. Simply select which of the two statements in each pair BEST describes you."* Respondents are then showed six paired statements.

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Key Findings

Key findings (1)

French Holiday Market

1. This research identifies the French holiday market as those who must be seriously considering taking a holiday or short break in the UK in the next few years.
2. Families and older independents make up the largest proportion of the current market (40% and 32% respectively), followed by Pre-Nesters (15%). Retirees are the smallest segment of the current market (13%).
3. The regions of residence of the French holiday market broadly replicates the French population and is spread across the regions of France.
4. Just under a quarter (23%) have some sort of existing ties to Wales - 'having Welsh ancestry', and 'having friends or family that live there' are the most dominant.
5. Over two thirds (69%) of the French holiday market have either been 'hit hard' by the cost of living crisis so far, or 'are ok but have to be careful', suggesting that financial concerns are an important consideration when planning trips to the UK

Trip Influences and Preferences – UK Holidays

1. The French holiday market is interested in a broad range of destination types. Urban destinations such as 'cities and large towns' and 'historic and heritage towns' make up the top two, but there is also strong interest in natural beauty, with 'scenic coastline and harbours' and 'scenic countryside and villages' making up the rest of the top four. 'Touring holidays' and 'mountain adventure' also appeal, albeit to a slightly lesser degree.
2. Destination influences and experiences broadly replicate preferred destination types – 'history, culture and heritage' and 'scenery, landscapes and outdoor activities' all featuring strongly. However, further underlining the French market's financial concerns, the second most cited influence for a UK trip is 'great value for money'. 'Is easy to travel to and get around' is also a strong influence, perhaps driven by practical concerns around Brexit – the main perceived barrier to visiting the UK.
3. Older independents and retirees show a preference for 'history and heritage', 'quiet places without crowds of people' and 'somewhere you can visit all times of the year', suggesting that promoting Wales's heritage offer outside the summer peak may appeal to these groups.
4. Although less likely than other life stages to engage in 'light exercise' such as 'walking/hiking', pre-nesters and families show a stronger preference for more vigorous pursuits such as 'adventure activities', 'cycling or mountain biking' and 'water sports'. Together this suggests that promoting Wales' scope for a range of outdoor activities will have cross-generational appeal.

Key findings (2)

Destination relationships and previous visits

1. The French market have some familiarity with Wales – nearly a third report that they know what there is to see and experience on a holiday. However, familiarity with Wales is lower than any other destination tested within this research, highlighting a key barrier to attracting this market.
2. Wales is the least likely destination in the UK and Ireland to have been visited at any point and in recent years. More positively, 2 in 5 of the French market state they have never been to Wales but would like to, outlining the potential to attract new French visitors in upcoming years.
3. Families have the strongest reported familiarity with Wales as a destination and report the most recent visits. There may also be an opportunity to 'reactivate' retirees who report relatively strong visits to Wales pre-2016 but lower visits more recently.

Destination associations and preferences

1. Relative to the destination types the French market like to visit, Wales has strong associations with history, heritage and the outdoors. It has weaker associations with 'cities and large towns', 'scenic coastline and harbours', 'touring holidays' and 'traditional seaside resorts'. Given that Wales has a relatively strong offer in most of these areas (with the exception of 'cities and large towns'), these findings suggest an opportunity for Wales to improve its appeal to the French market.
2. In terms of destination influences and experiences important to the French market, Wales has strong associations with influences related to history, culture and heritage, and the outdoors, as well as being a place you can visit all year round and for having accommodation with charm and character. Influences related to people – such as being welcoming and opportunities to socialise – also score well.
3. Wales also has weaker associations with offering lots of activities, places renowned for food and drink, famous landmarks, and quality accommodation. Given Wales' strong outdoor activity offer, driving perceptions in this area may generate a more appealing product for the French market. Wales also has a weaker association with 'great value for money'.
4. In a competitive context, Wales is seen in a similar way to Scotland and Ireland, but with generally lower associations across all areas. This underlines the challenging competitive context Wales operates in and the need to strengthen perceptions.

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Key findings (3)

Trip Intentions – UK Holidays

1. 2 in 5 of the French market are ‘very likely’ to take a UK holiday in the next few years, a further 3 in 5 ‘fairly likely’, indicating that many are still undecided.
2. Nearly half anticipating a UK trip, plan on taking it from next year onwards with a further 1 in 5 ‘unsure’.
3. 1 in 9 have already booked a trip this year and a further 1 in 4 would like to come this year but have not yet booked. Likelihood of visiting is strongest amongst families during 2023, with older independents and retirees the least likely to visit.
4. The biggest perceived barrier to visiting the UK amongst the French market is ‘Brexit has made travel to the UK more difficult’, a leading reason for all life stages. The research suggests the barriers relating to Brexit are largely practical in nature (‘welcome’ as a barrier is significantly lower).
5. Finances are also a barrier to visiting – ‘it’s too expensive in the UK generally’ and ‘exchange rates make the UK too expensive’ making up the remainder of 3 most commonly cited barriers. Nearly 7 in 10 of the French market indicate that they are being careful or have already been hit hard by the cost-of-living crisis. Highlighting the strong value for money of Wales trips could help to attract the cost-conscious French visitor.

Future trips to Wales

1. 6% of the French market state they have already booked a holiday or short break in Wales in the next few years, with just over a quarter ‘very interested – but have not yet booked’. 11% of the French market that are interested in taking a Wales trip state they are planning on doing so in 2023, however the vast majority are planning to take their trip in 2024 or later.
2. The French market are most likely to visit Wales between May and September, with families more likely to visit in off season months (January to March) than other life stages.
3. Over half of overnight trips to Wales are stays of 4-7 nights, although 3 in 10 anticipate a longer break of 8+ nights.
4. French visitors to Wales will predominantly be staying in more than one place – 57% would stay overnight in more than one place in Wales.
5. 27% of Wales trip intenders intend to stay elsewhere in the UK and Ireland before visiting Wales and a similar number (28%) intend to stay elsewhere in the UK and Ireland after visiting Wales – London the leading additional destination.

Key findings (4)

4. Aligned with preferences and associations, the most popular destination types for a trip to Wales are 'historic or heritage town', 'scenic countryside or village' and 'scenic coastline or harbours'. 'Cities or large towns' (the joint most preferred destination type amongst the French market) are relatively low down the list of Wales destination types, further reflecting low associations here.
5. Intended activities broadly replicate general preferences amongst the French market with 'history, culture and heritage', 'nature and wildlife experiences' and 'trying local food and drink' all dominant.
6. 'Hotels or motels' are the most popular type of accommodation amongst Wales trip takers, followed by 'guest house/B&B'. Caravans (either static or touring) and tents are the least popular type of accommodation amongst future Wales trip takers.
7. There is strong general interest in visiting festivals/events in Wales, in particular those relating to 'local produce/arts/craft' and 'food and drink'.

Wales trip booking and information influences

1. Printed travel guide books/brochures and conversations with friends are the main sources the French market use to plan their trip. However, there is some difference by life stage – 'online travel agents' and 'social media' are more popular amongst younger life stages, while 'conversations with family friends' are more popular amongst older life stages.
2. Trips to Wales are most likely to be booked via a 'price comparison site', perhaps further reflecting cost-of-living concerns.
3. 7 in 10 will book at least some of the elements of their trip separately – driven largely by families. Only 15% will book most or all elements as one package and this is driven by retirees.
4. Perhaps notably, 3 in 10 French intenders anticipate booking their next Wales trip within 1 month of the travel date, with a further 1 in 4 expecting to do so 1 to 3 months before the travel date. The last-minute nature of trip-booking highlights the potential to attract French visitors in the short-term, as well as later in 2023 and beyond.

Key findings (5)

Non-intenders to Wales

1. A lack of awareness of Wales' holiday offer is a key barrier to visiting Wales - 'I never thought of Wales as a destination' and 'I don't know enough about what there is to do' are the reasons most commonly cited by non-intenders for not being interested in taking a trip to Wales in the next few years. This underlines the potential positive impact of raising Wales' profile within this market.
2. Of the people who stated they are not intending to visit Wales in the next few years, London is the most popular alternative destination within the UK and Ireland, but a large proportion also indicated they would visit Scotland or Ireland.
3. There is also an opportunity to attract visitors to England on day trips - 14% of those not intending to visit Wales in the next few years state that they are 'very/fairly' likely to take a day trip there when on a holiday elsewhere in the UK.

Marketing Impact

1. Just over a third of the French holiday market 'definitely/possibly' recall seeing promotions or marketing about Wales in the last year or so, rising to just over half of those from a family life stage.
2. Of the French holiday market who have 'definitely' or 'possibly' seen promotions or marketing on Wales in the last year or so, they are most likely to recall seeing 'promotion or content on social media' and 'television advertising', although a range of other sources were also mentioned.

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Key findings (6)

Promotion and awareness of Wales from Football World Cup

1. A quarter stated they watched a Wales football match during the Football World Cup, and a further 30% saw some form of media coverage about Wales.
2. Those that had seen a Wales match, promotion, advertising or media coverage of Wales in the World cup were asked if they did anything as a result of seeing the promotions or coverage. In total, 87% engaged with Wales at some level as a result of watching football coverage or seeing promotions of Wales during the World Cup.

Sustainability

1. Sustainability is an important consideration for the French holiday market. A notable 2 in 5 belong to sustainability segments that are passionate in this area.
2. Climate change, species extinction, the use of single-use plastic and deforestation are the biggest sustainability concerns for the French holiday market.
3. Although the French holiday market are actively trying to help the environment in a range of different ways, there is a general consensus that 'large companies' should be doing more in this area. This suggests that tourism organisations in Wales could connect positively with this audience by communicating their efforts in this area.
4. Notably, just over 1 in 4 are flying less or flying shorter distances, a potential positive for trips to Wales which is relatively close in comparison to other destinations, and therefore less dependent upon air access.

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Demographics of the French Holiday Market

Gender and life stage of the French holiday market

- The gender split of the French holiday market is slightly skewed towards females (53%). ‘Families’ are the largest life stage, making up 2 in 5 of the sample. This is followed by ‘older independents’ who make up just under a third of the sample (32%). ‘Retirement age’ is the smallest life-stage, making up just 13%, with ‘Pre-nesters’ making up 15%.

Figure 1. Gender of respondents, Percentage, All respondents

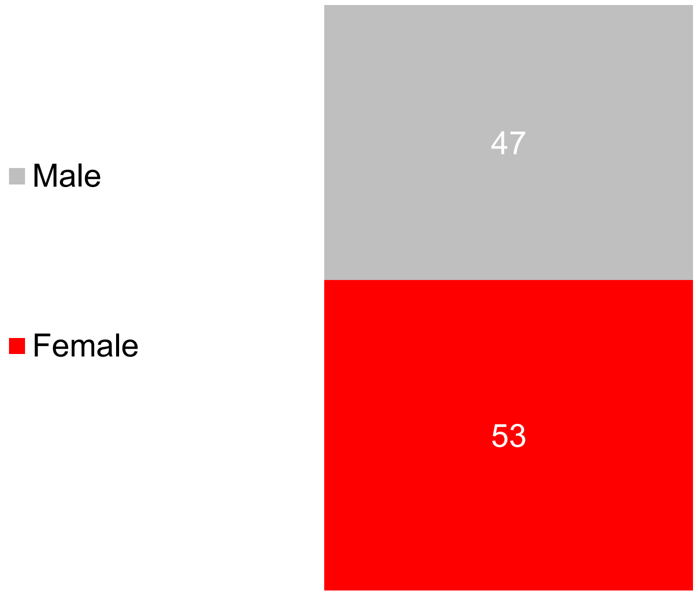
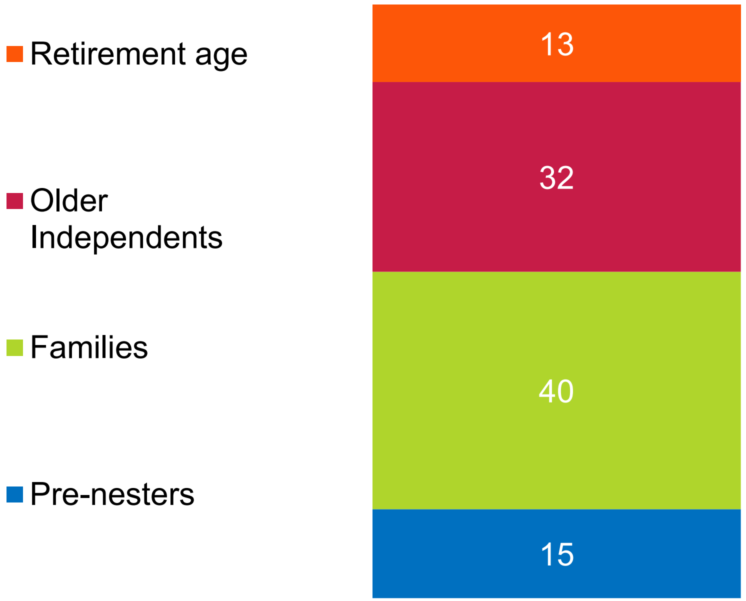


Figure 2. Life stage of respondents, Percentage, All respondents



Demographics questions. All data weighted.
Base: All respondents n=1,007

Relationship with Wales and VisitBritain segments

- Just under a quarter (23%) have some sort of existing ties to Wales - ‘having Welsh ancestry’, and ‘having friends or family that live there’ are the most dominant of these ties (11% falling into each of these categories).
- ‘Experience Seekers’ are the largest segment amongst the French market, followed by Explorers, Adventurers and Culture Buffs. Sightseers are the smallest segment.

Figure 3. Relationship with Wales, Percentage, All respondents

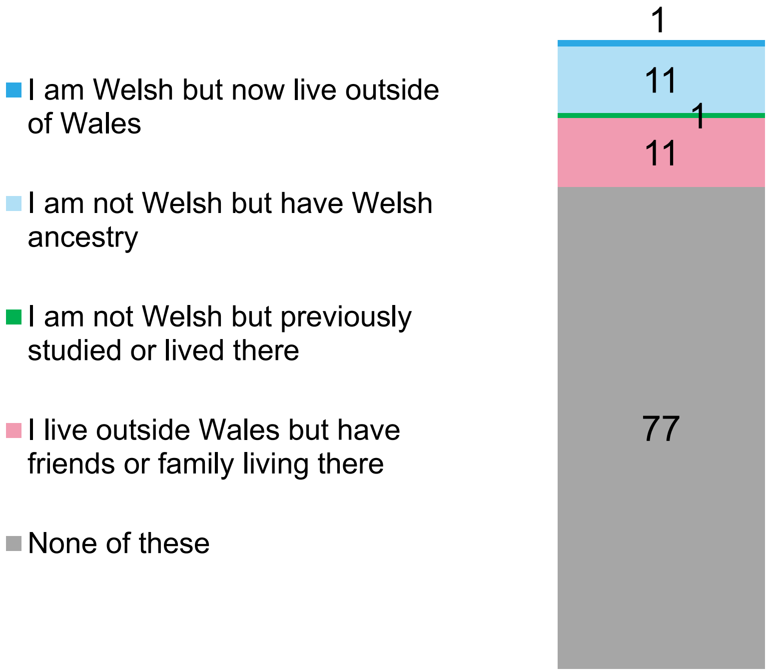
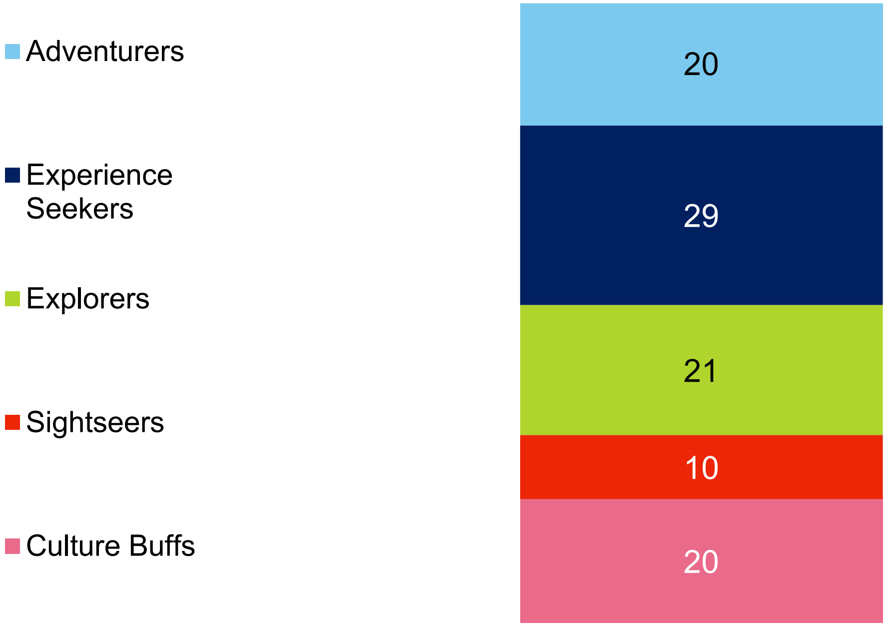


Figure 4. Visit Wales Segment of respondents, Percentage, All respondents



X9. Which, if any, of the following apply to you? All data weighted. For segment questions see introduction. All data weighted.
Base: All respondents n=1,007

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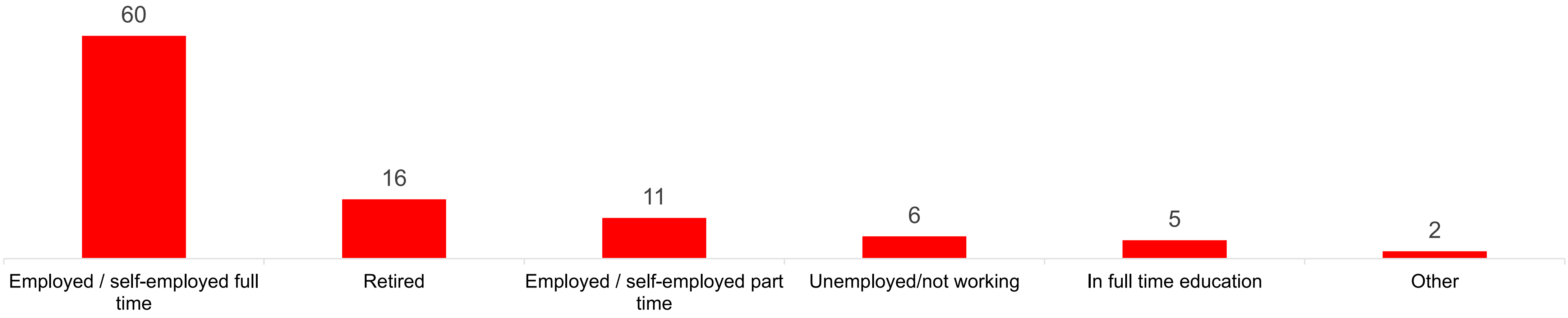
Employment status of the French holiday market

- 3 in 5 of the French holiday market is in full-time employment and almost 1 in 6 (16%) are retired. Only 6% are unemployed/not working and only 5% are in full time education.

Figure 5. Employment status of respondents, Percentage, All respondents

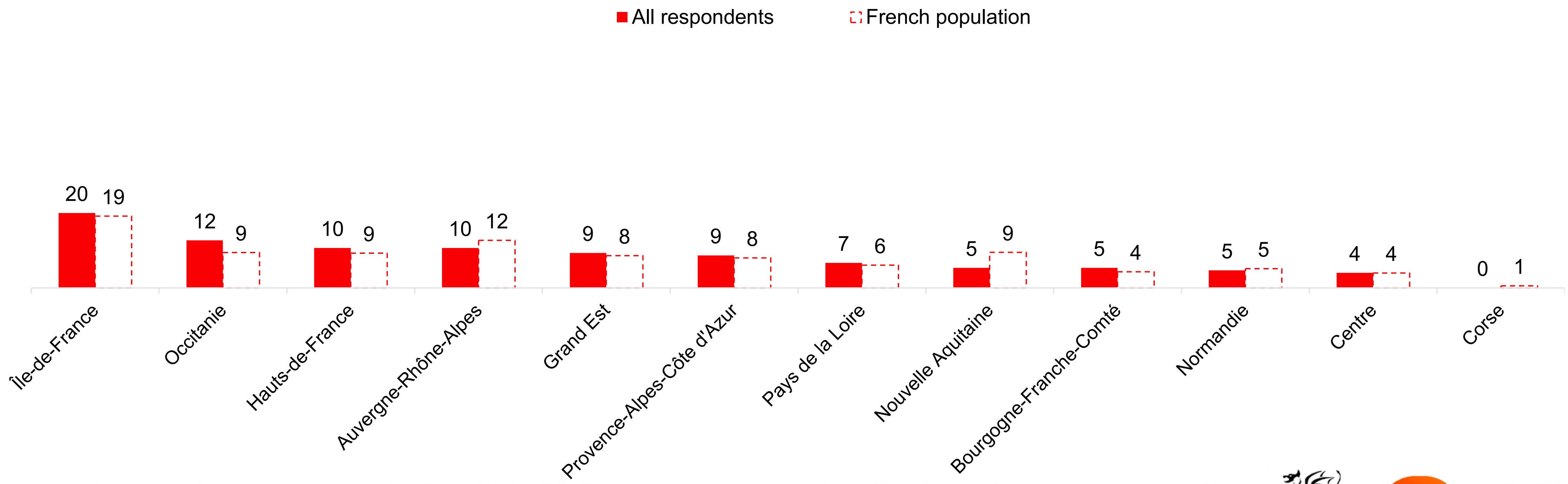


X3a.Which of these best describe you? All data weighted.
Base: All respondents n=1,007

Region of residence

- Reflecting population levels, the region of residence of the French holiday market which has the highest representation is Île-de-France (20%).
- Generally, the distribution of respondents replicates the population, except for Occitanie (over-indexing amongst respondents) and Nouvelle Aquitaine (under-indexing amongst respondents), although even in these cases proportions are similar.

Figure 6. Origin of enquirers, Percentage, All respondents



Demographics questions. S3. Where in France do you live? All data weighted.
Base: All respondents n= 1,007 French population is sourced from Statista data 2023
https://www.statista.com/statistics/608761/population-of-france-by-region/

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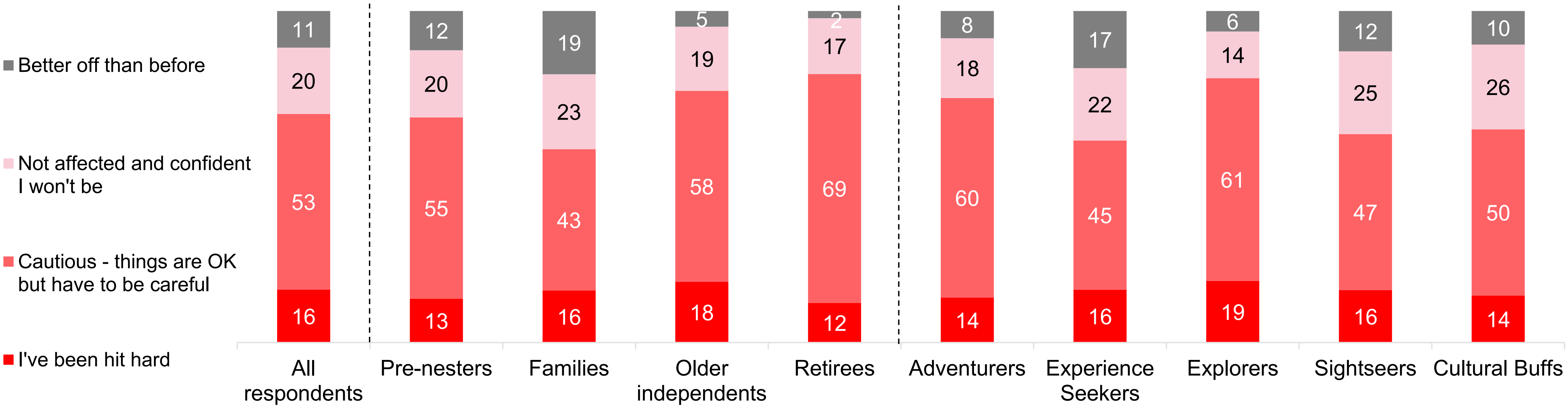
Attitude to 'cost of living crisis' and fall-out of Visit Wales segments

- Over two thirds (69%) of the French holiday market have either been 'hit hard' by the cost of living crisis so far, or 'are ok but have to be careful' – the latter making up the largest proportion. 1 in 5 believe they will not be affected, and 11% say they are better off than before the crisis.
- Families are the most likely to state they are 'better off', with retirees more likely to be being 'cautious'.
- Amongst VisitBritain segments, the younger Experience Seekers are most likely to be 'better off than before', with Explorers and Adventurers more likely to be 'cautious'.

Figure 7. Impact of cost of living crisis so far, Percentage, All respondents



X4c. There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? All data weighted.
Base: All respondents n=1,007. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135; Adventurers n=201; Experience Seekers n=289; Explorers n=214; Sightseers n=104; Cultural Buffs n=199

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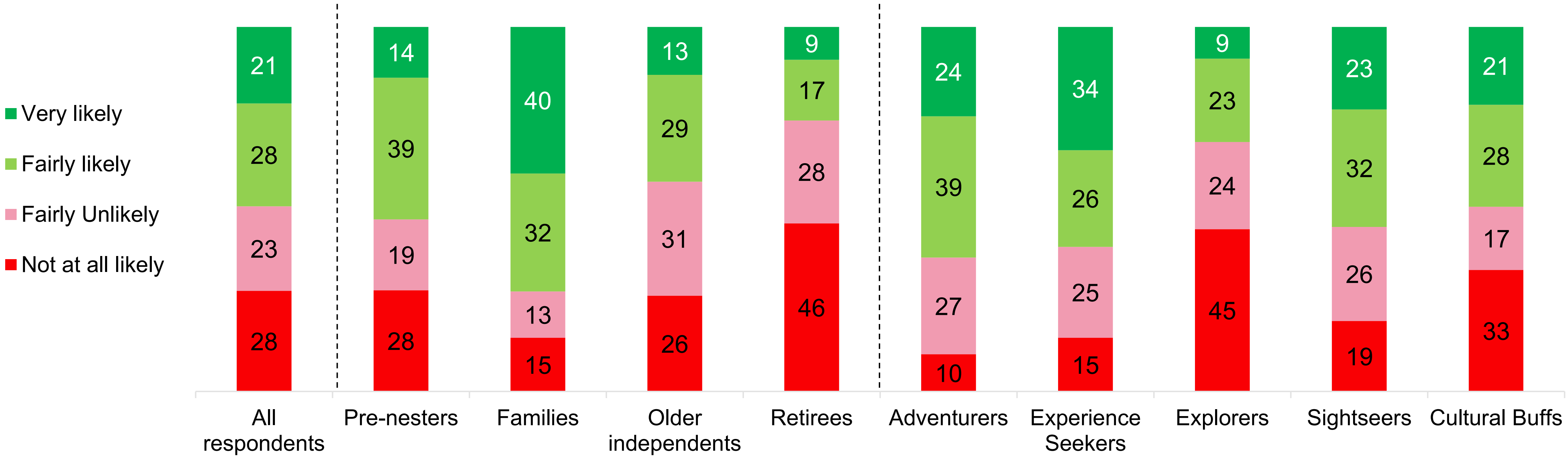
Trip Intention and Barriers

UK holiday/short break intention in the next few years – by population

- 1 in 5 (21%) of the French population are 'very likely' to take a UK holiday/short break in the next few years.
- Families are considerably more likely than older independents or retirees to say they are 'very likely' to take a holiday or short break in the UK in the next few years.
- By segment, Experience Seekers are more likely to state that they are 'very likely' to take a holiday or short break in the UK in the next few years. There is strong interest across most other segments, with the exception of Explorers.

Figure 8. Likelihood of taking a UK holiday or short break in the next few years, Percentage, All population



S6. How likely or unlikely are you to take a holiday or short break in the UK in the next few years?
Base: All national representative respondents n=315; Pre-nesters n=36*; Families n=102; Older Independents n=99; Retirees n=78; Adventurers n=49*; Experience Seekers n=68; Explorers n=92; Sightseers n=31*; Cultural Buffs n=78
*Caution: Low base sizes – treat indicatively

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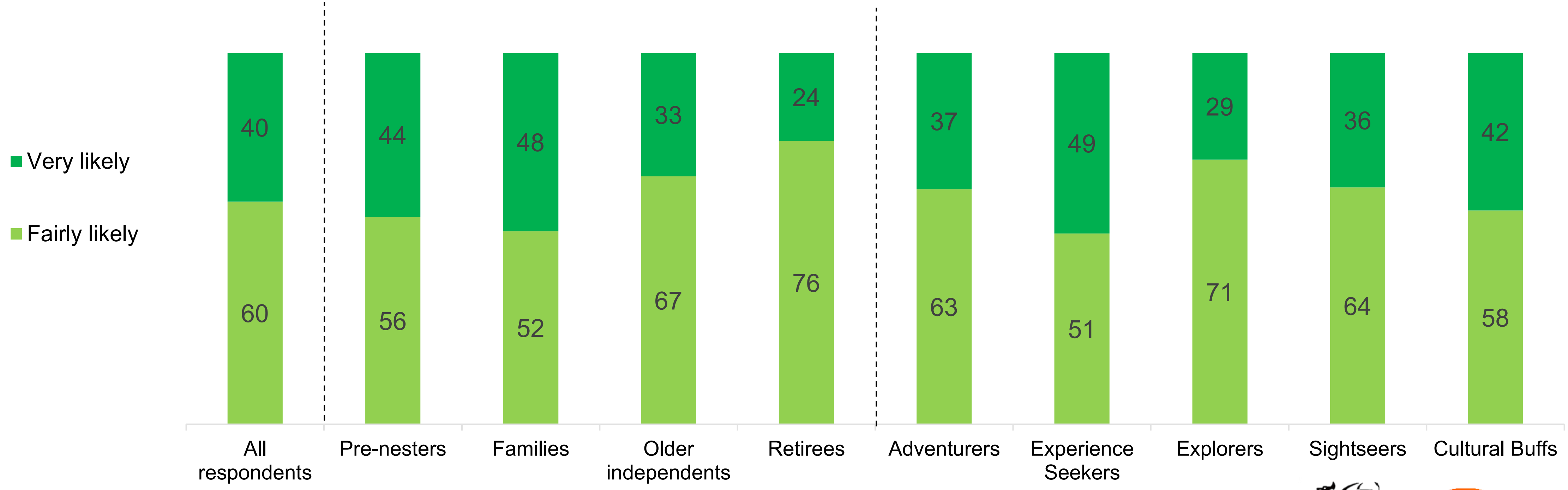
UK holiday/short break intention in the next few years – by holiday market

- 2 in 5 of the French holiday market are ‘very likely’ to take a UK holiday/short break in the next few years.
- Likelihood of taking an overnight trip to the UK is lower amongst older independents and retirees, with a large majority of these life stages reporting that they are only ‘fairly likely’ to do so.
- Experience Seekers are most likely to take a UK trip in the next few years (49% are ‘very likely’ to do so), followed closely by Cultural Buffs. Only 29% of the Explorers state that they are ‘very likely’ to take holiday/short break in the UK, the lowest among all Visit Britain segments.

Figure 9. Likelihood of taking a UK holiday or short break in the next few years, Percentage, All respondents



S6. How likely or unlikely are you to take a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents n=1,007; Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135; Adventurers n=201; Experience Seekers n=289; Explorers n=214; Sightseers n=104; Cultural Buffs n=199

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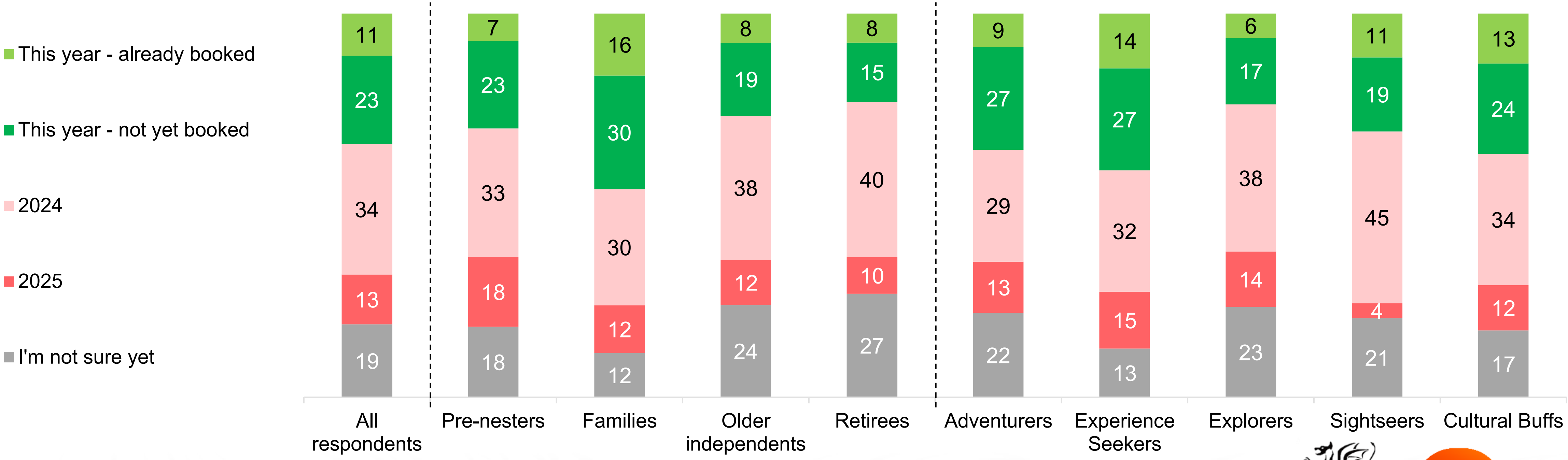
UK holiday/short break intention in the next few years

- Around 1 in 3 (34%) of the French market state that they are planning on taking a UK trip in 2023, with just under a half (47%) planning their UK trip in 2024 and 2025.
- Families are the most likely to take an overnight UK trip this year (46% planning to do so), ahead of the next most likely life stage (pre-nesters at 30%). Aligned with likelihood to travel to the UK, retirees are the least likely to take a trip in 2023 and the most likely to be 'unsure'.
- Experience Seekers are more likely to plan their UK trip in 2023 than the other segments. Nearly half (45%) of the Sightseers plan to travel to the UK in 2024.

Figure 10. When planning to take a UK trip in the next few years, Percentage, All respondents



S7. In which year are you likely to take your next holiday or short break in the UK? All data weighted.
Base: All respondents n=1,007; Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135; Adventurers n=201; Experience Seekers n=289; Explorers n=214; Sightseers n=104; Cultural Buffs n=199

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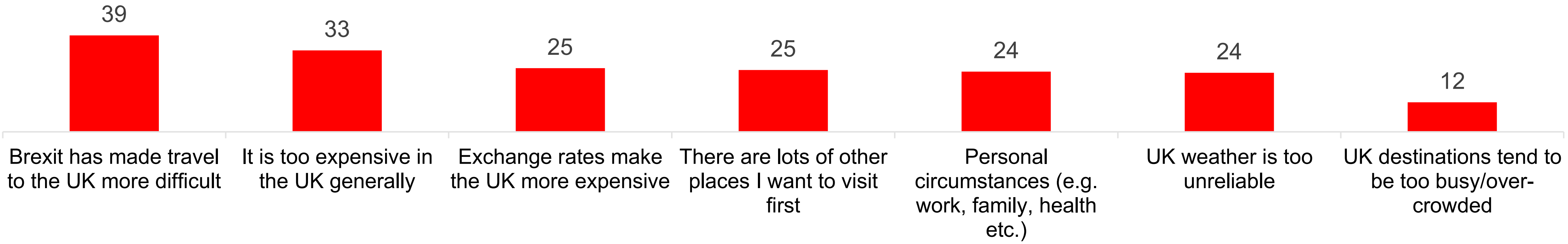
Barriers to taking a UK overnight trip

- The largest barrier to taking a UK holiday/short break amongst the French market is ‘Brexit has made travel to the UK more difficult’ (39%).
- Beyond Brexit, a third (33%) state ‘it is too expensive in the UK generally’, and a quarter (25% that ‘exchange rates make the UK more expensive’ and ‘there are lots of other places I want to visit first’ (25%). ‘Personal circumstances’ (24%) and ‘UK weather’ (24%) are also notable barriers.

Figure 11. Barriers to take a UK holiday/short break in next few years, Percentage, Top 7, All respondents



S9. Which, if any, of these are barriers to people like you taking a short break or holiday in the UK in the next few years? All data weighted.
Base: All respondents n=1,007

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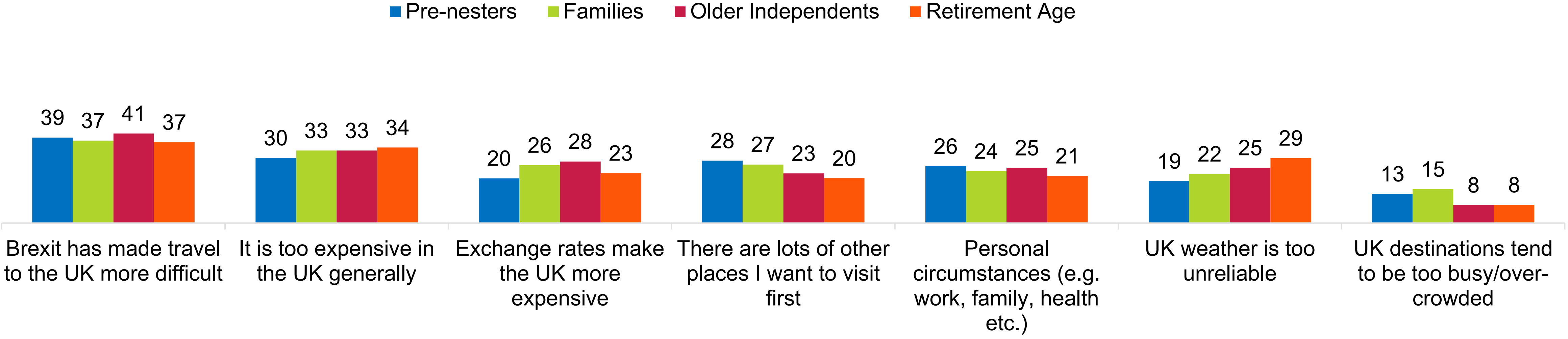
Barriers to taking a UK overnight trip by life stage

- ‘Brexit has made travel to the UK more difficult’ is the leading barrier to UK travel amongst all life stages from the French market.
- There is minimal variation across all barriers, although ‘weather’ is more dominant amongst older independents and retirees, and ‘there are lots of other places I want to visit first’ is more dominant amongst families and pre-nesters. Pre-nesters and families are also more likely to cite ‘UK destinations tend to be too busy/over-crowded’, but this isn’t a leading barrier for any life stage.

Figure 12. Barriers to take a UK holiday/short break in next few years by life stage, Percentage, Top 7, All respondents



S9. Which, if any, of these are barriers to people like you taking a short break or holiday in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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Barriers to taking a UK overnight trip

- 1 in 10 people cite sustainability as a barrier to taking a short break or holiday in the UK in the next few years with the statement ‘travelling abroad has a negative impact on the environment’.
- Barriers such as ‘the UK isn’t a welcoming destination’ and ‘limited or fewer flight connections’ are the least likely to be cited amongst the French market.

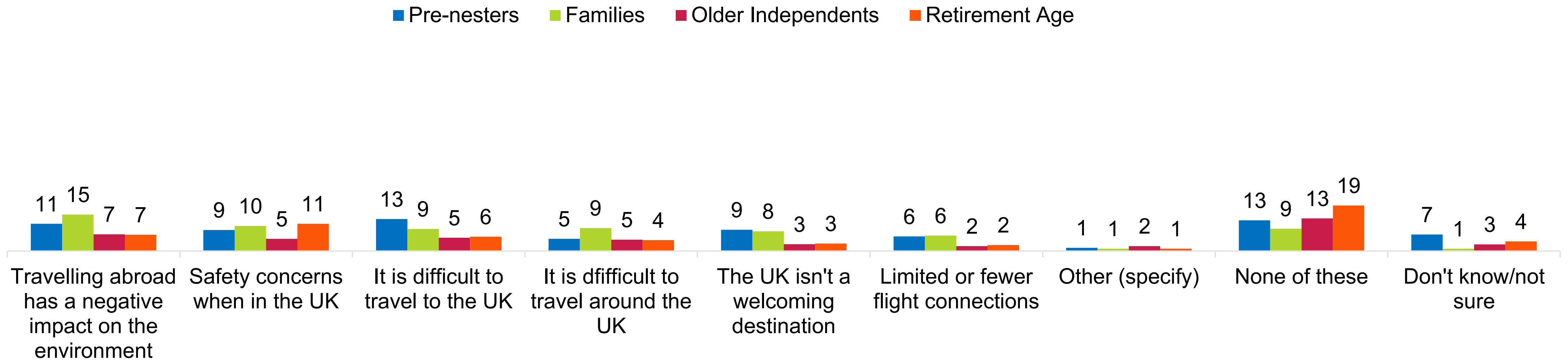
Figure 13. Barriers to take a UK holiday/short break in next few years, Percentage, Bottom 7, All respondents

S9. Which, if any, of these are barriers to people like you taking a short break or holiday in the UK in the next few years? All data weighted.
Base: All respondents n=1,007

Barriers to taking a UK overnight trip by life stage

- Families index highest compared to other life stages on ‘travelling abroad has a negative impact on the environment’.
- Pre-nesters and families are more likely to cite difficulty travelling to the UK as a barrier to taking a short break or holiday in the UK in the next few years. They are also more likely to report ‘The UK isn’t a welcoming destination’ as a barrier here.

Figure 14. Barriers to take a UK holiday/short break in next few years by life stage, Percentage, Bottom 7, All respondents



S9. Which, if any, of these are barriers to people like you taking a short break or holiday in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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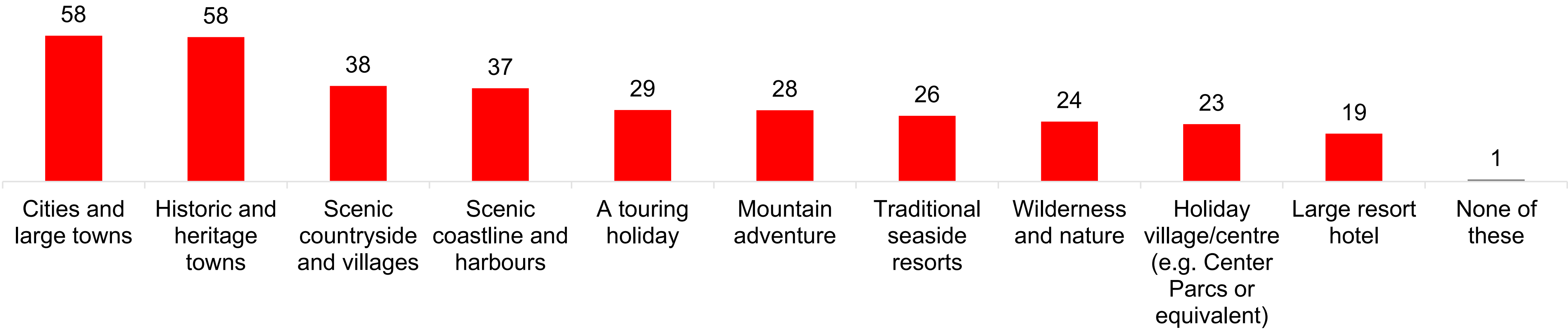
Trip Influences and Preferences

Destination types seriously considering for a UK overnight trip

- ‘Cities and large towns’ and ‘historic and heritage towns’ are the destination types that the French holiday market are most likely to be ‘seriously considering’ for a UK holiday/short break in the next few years (both at 58%). ‘Scenic countryside and villages’ and ‘scenic coastline and harbours’ also generate strong consideration from just under 2 in 5.
- Smaller but notable proportions are interested in ‘touring holidays’, ‘mountain adventure’, ‘traditional seaside resorts’ and ‘wilderness and nature’.
- On average, the French market would seriously consider around three destination types for a UK holiday. Notably, ‘cities and large towns’ and ‘historic and heritage towns’ tend to be the destination types most likely to be considered in combination with others – for example, 72% of those that would consider ‘wilderness and nature’ would also consider a ‘historic and heritage town’.

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



B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents n=1,007

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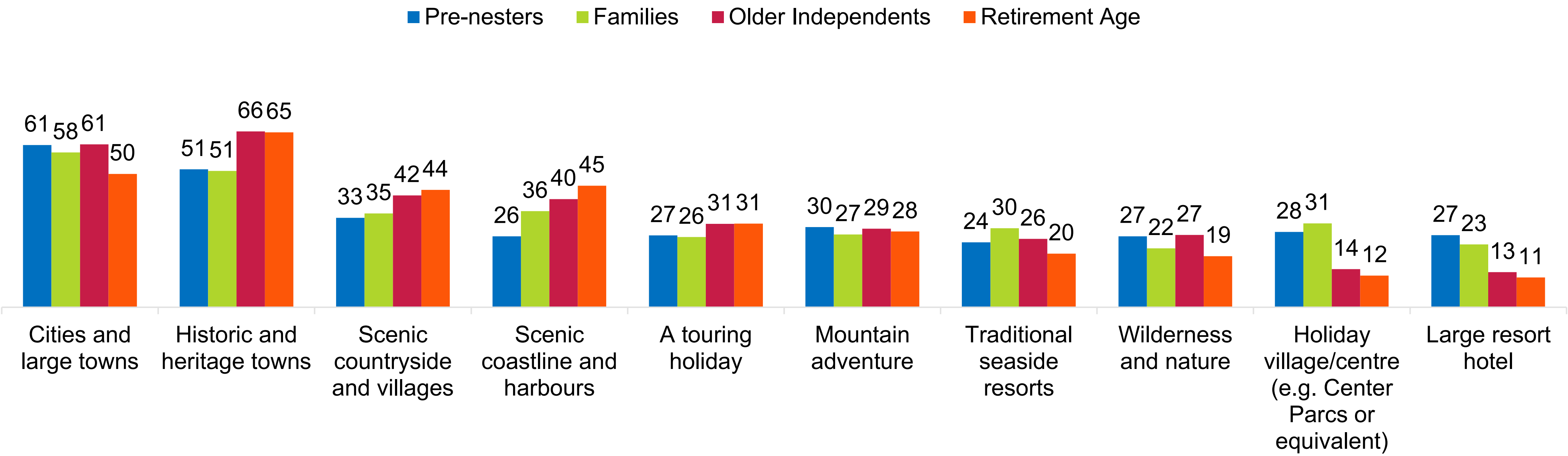
Destination types seriously considering – by life stage

- There is some variation in destination type preference by life stage. ‘Cities and large towns’ are strongly preferred by all life stages, although less so amongst retirees. ‘Historic and heritage towns’ are most appealing to older independents and retirees, although these are also the second-most popular destination types among pre-nesters and families. Older independents and retirees are also more likely to favour trips to ‘scenic countryside and villages’ and ‘scenic coastline and harbours’, as well as touring holidays. ‘Mountain adventure’ has cross-generational appeal. Holiday villages/centres and large resort hotels are more likely to appeal to families and pre-nesters than to other life stage groups.

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



B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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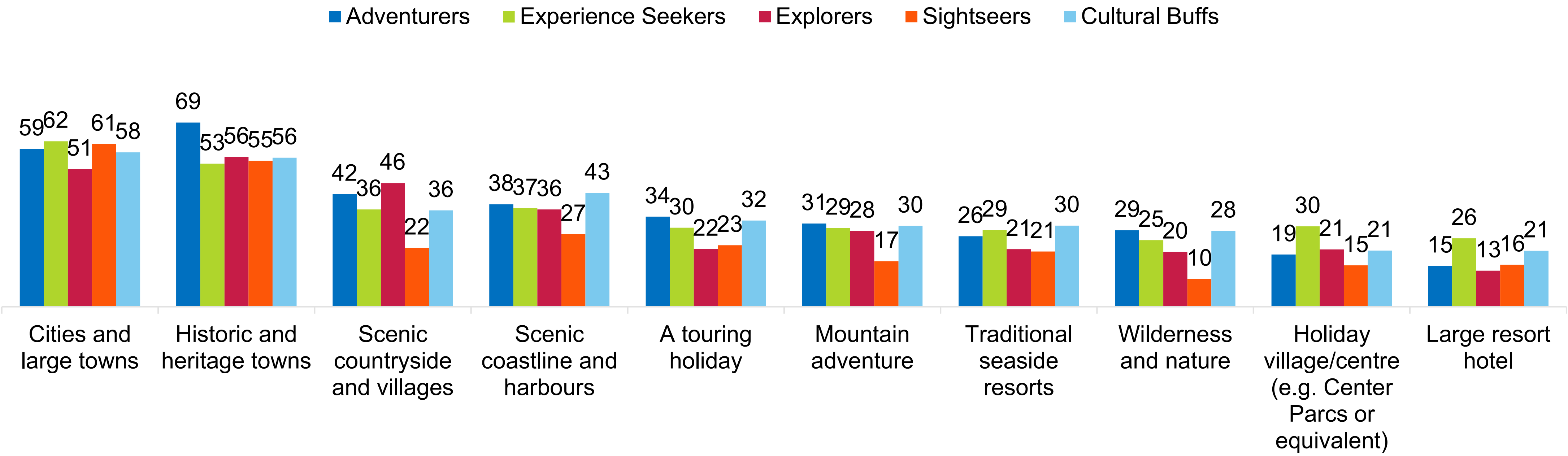
Destination types seriously considering – by VisitBritain segments

- All segments show a strong interest in visiting ‘cities and large towns’ and ‘historic and heritage towns’. Notably, ‘Adventurers’ index particularly highly for the latter.
- Experience Seekers and Cultural Buffs have similar preferences in terms of destination types - they are more likely to consider ‘traditional seaside resorts’ and ‘large resort hotel’ than other segments.

Figure 17. Destination types seriously considering a UK holiday/short break in next few years by segment, Percentage, All respondents



B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents. Adventurers n=201; Experience Seekers n=289; Explorers n=214; Sightseers n=104; Cultural Buffs n=199.

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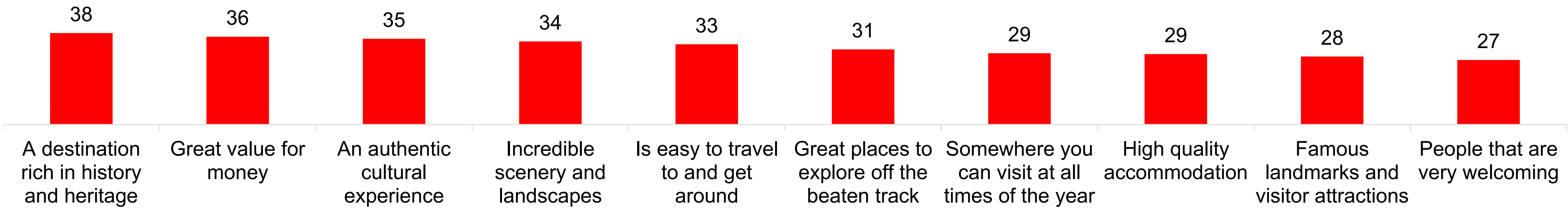
Destination influences for a UK overnight trip

- A broad range of factors influence destination choice for UK holidays amongst the French holiday market. ‘A destination rich in history and heritage’, ‘great value for money’, ‘an authentic cultural experience’, ‘incredible scenery and landscapes’, and ‘is easy to travel to and get around’ are the top five, and each are cited by between 38% and 33%.
- Other important influences include ‘great places to explore off the beaten track’, ‘somewhere you can visit at all times of the year’, ‘high quality accommodation’, ‘famous landmarks and attractions’, and ‘people that are very welcoming’.

Figure 18. Destination influences for a UK trip, Percentage, Top 10, All respondents



B2. Below is a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted.
Base: All respondents n=1,007

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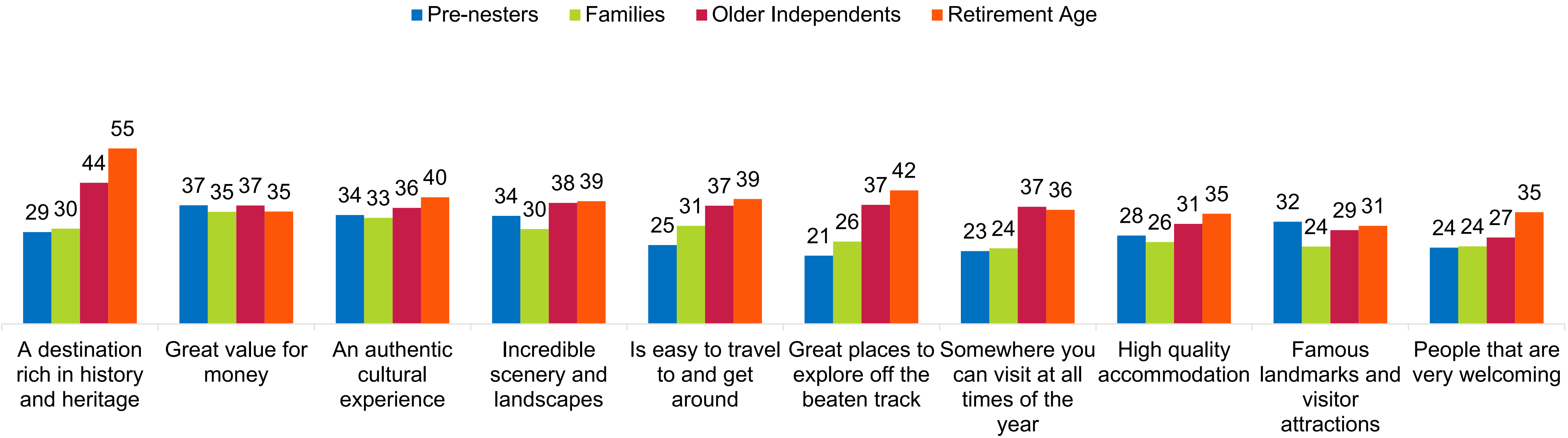
Destination influences for a UK overnight trip – by life stage

- Although the top destination influences are cited by similar proportions of respondents, there are large differences by life stage. ‘History and heritage’, for example, is much more important amongst older life stages and almost twice as influential to retirees as it is to pre-nesters and families. ‘Is easy to travel to and get around’, ‘great places to explore off the beaten track’ and ‘somewhere you can visit all times of the year’ are also much more influential amongst older independents and retirees.
- However, some influences are similarly important across life stages – all life stages are influenced to a strong degree by ‘value for money’, ‘an authentic cultural experience’ and ‘incredible scenery and landscapes’.

Figure 19. Destination influences for a UK trip by life stage, Percentage, Top 10, All respondents



B2. Below is a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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Destination influences for a UK overnight trip

- A range of other destination influences are also important to the French market, including 'accommodation with charm and character', 'lots of activities and things to do' and 'quiet places without crowds of people'. 'Opportunities to explore my hobbies and interests' and 'an environmentally friendly destination' are the least cited influences.

Figure 20. Destination influences for a UK trip, Percentage, Bottom 8, All respondents

B2. Below is a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted.
Base: All respondents n=1,007

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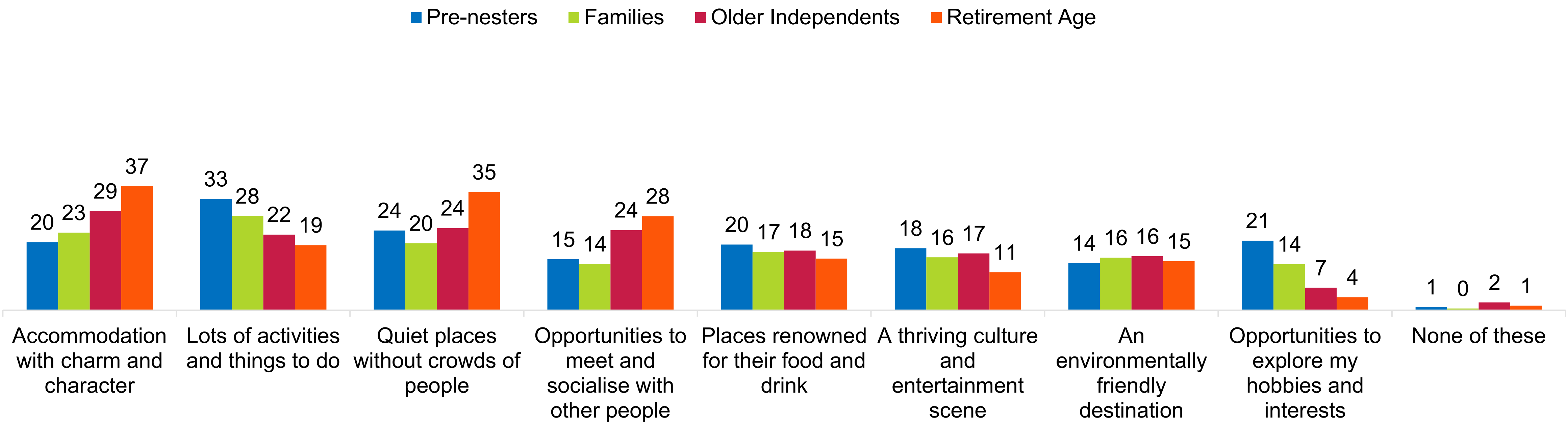
Destination influences for a UK overnight trip – by life stage

- Notably, 'accommodation with charm and character' and 'quiet places without crowds of people' are more influential to retirees - both making their top 10 most reported influences overall.
- Both 'accommodation with charm and character' and 'opportunities to meet and socialise with other people' are cited more by retirees and older independents, compared to other life stages.
- 'Lots of activities and things to do is more important for pre-nesters (at 33%, their 4th most reported influence overall), as is 'opportunities to explore my hobbies and interests'.

Figure 21. Destination influences for a UK trip by life stage, Percentage, Bottom 8, All respondents



B2. Below is a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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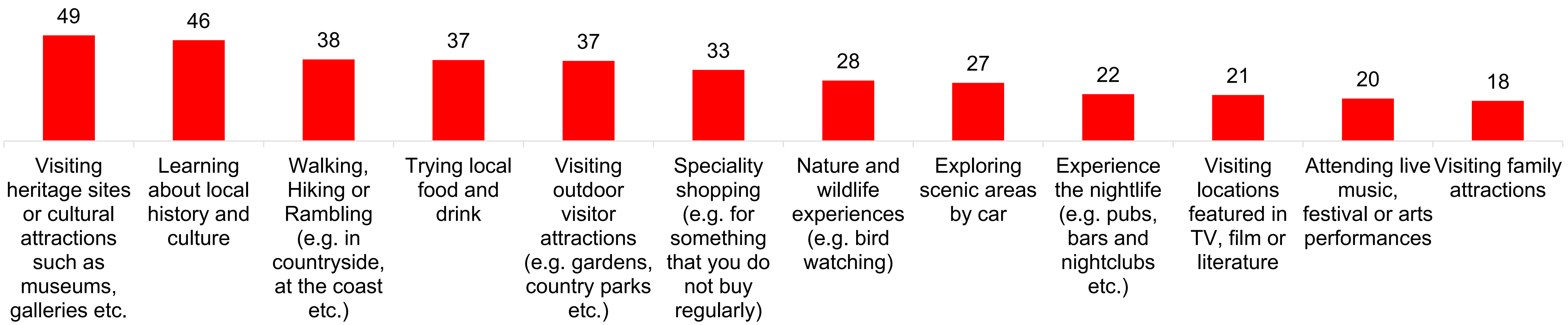
Experiences would most like to do on a UK holiday/short break

- In terms of experiences, ‘visiting heritage sites or cultural attractions’ (49%) is what the French holiday market would most like to do on a UK holiday, followed closely by ‘learning about local history and culture’ (46%). ‘Walking, hiking or rambling’ (38%), ‘trying local food and drink’ (37%) and ‘visiting outdoor visitor attractions’ (37%) are also popular, as is ‘speciality shopping’ (33%)

Figure 22. Experiences would most like to do on a UK trip, Percentage, Top 12, All respondents

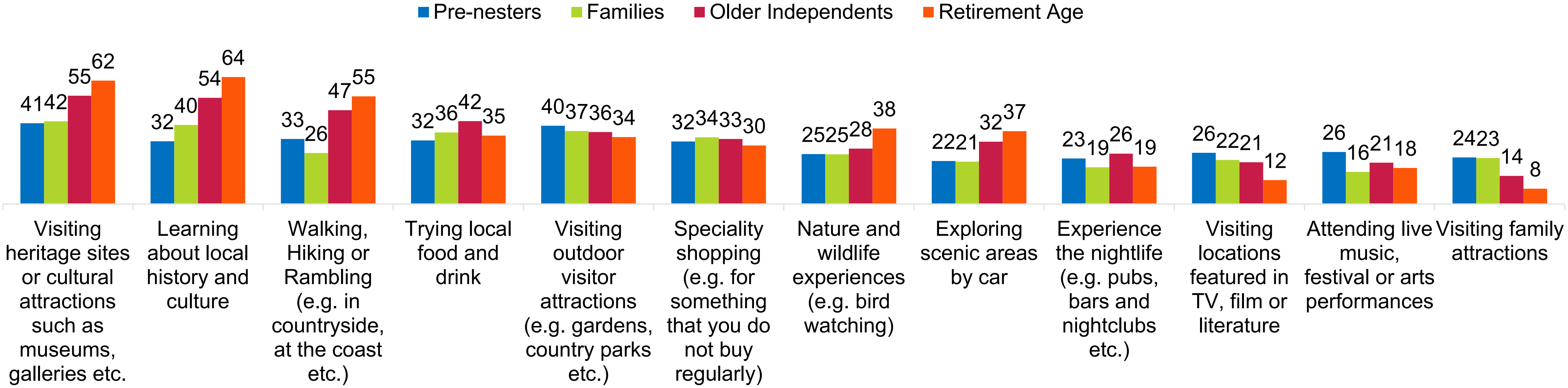


B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents n=1,007

Experiences would most like to do – by life stage

- Aligned with their general destination preferences, interest in experiences relating to history, heritage and culture is driven by older independents and retirees. Notably, these life stages also drive the preference to spend time 'walking, hiking or rambling' and 'exploring scenic areas by car'. Pre-nesters and families are the most likely to be interested in 'visiting family attractions'.
- There is cross-generational appeal in 'trying local food and drink', 'visiting outdoor attractions' and 'speciality shopping'.

Figure 23. Experiences would most like to do on a UK trip by life stage, Percentage, Top 12, All respondents



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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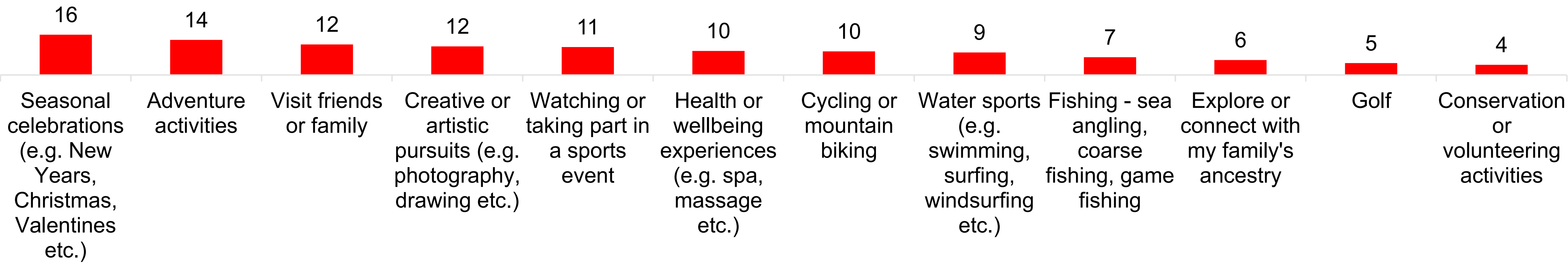
Experiences would most like to do on a UK holiday/short break

- A range of other activities appeal to a more niche audience. For example, ‘seasonal celebrations’ are likely to be undertaken by 16%, and 14% are likely to partake in ‘adventure activities’.
- Activities such as ‘explore or connect with my family’s ancestry’, ‘golf’ and ‘conservation or volunteering’ are least likely to be preferred experiences on a holiday or short break in the UK.

Figure 24. Experiences would most like to do on a UK trip, Percentage, Bottom 12, All respondents



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents n=1,007

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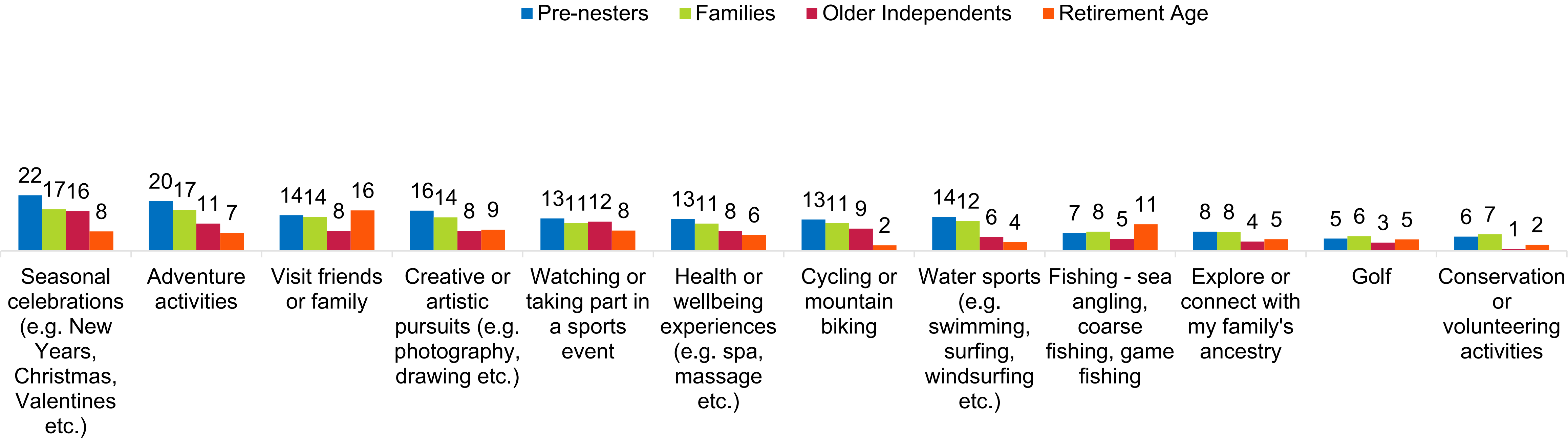
Experiences would most like to do – by life stage

- Amongst activities with more niche appeal, younger life stages index relatively highly on ‘seasonal celebrations’, ‘adventure activities’, ‘creative or artistic pursuits’, ‘health or wellbeing experiences’, ‘cycling or mountain biking’ and ‘water sports’.
- ‘Seasonal celebrations’ are also relatively popular with older independents.

Figure 25. Experiences would most like to do on a UK trip by life stage, Percentage, Bottom 12, All respondents



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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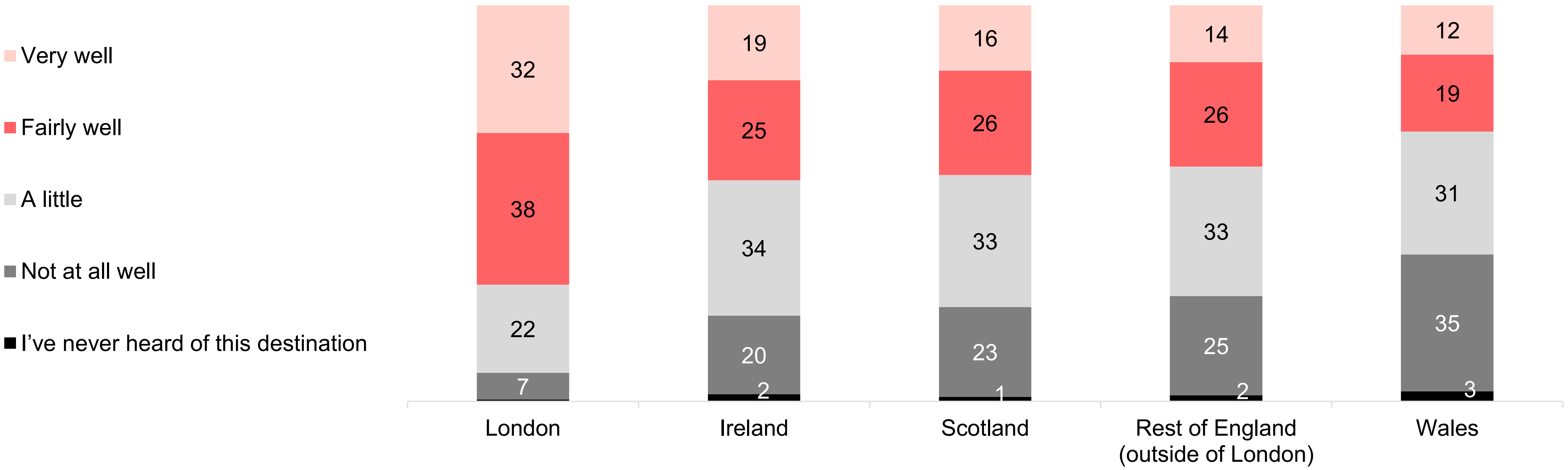
Destination Relationships and Previous Visits

Familiarity with Wales and other destinations

- Of the destinations tested within this research, the French holiday market are most familiar with London, with 70% stating that they know what there is to see and experience there ‘very well’ or ‘fairly well’.
- Less than a third (31%) believe they know what there is to see and experience on holiday in Wales - lower than any other destination tested.

Figure 26. Familiarity with each destination, Percentage, All respondents

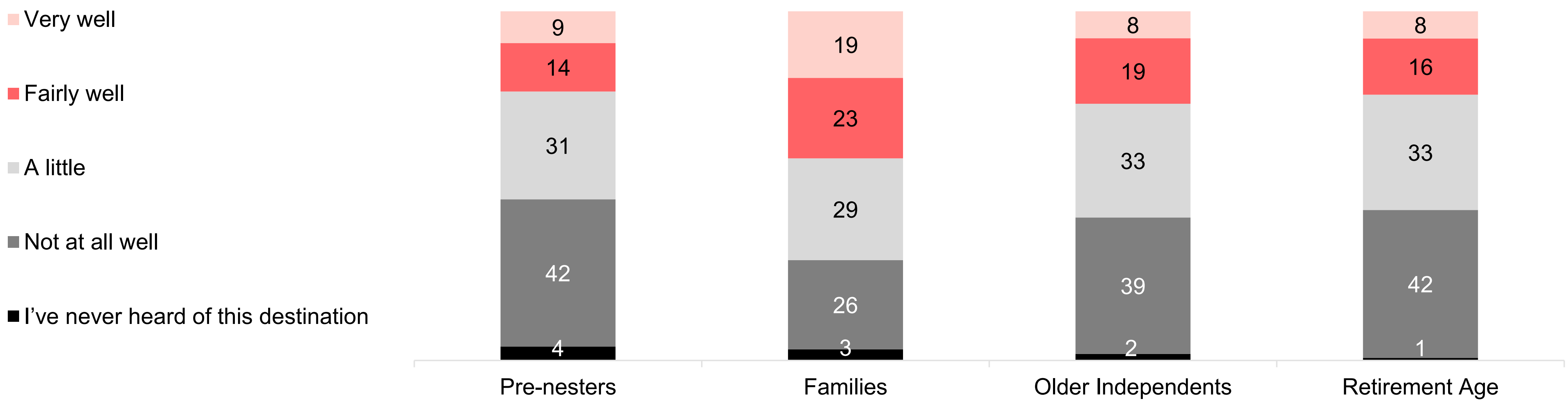


C1. How well, if at all, do you know what there is to see and experience on a holiday or short break in each of these parts of the UK and Ireland? All data weighted.
Base: All respondents n=1,007

Familiarity with Wales by life stage

- A majority of all life stages report that they do not know Wales ‘very well’ or ‘fairly well’ as a holiday destination.
- Families report the strongest familiarly with Wales – just over 2 in 5 (42%) say that they know what there is to see and experience on a holiday or short break to Wales ‘very well’ or ‘fairly well’. Notably, pre-nesters and retirees are the most likely to say they know Wales ‘not at all well’.

Figure 27. Familiarity with Wales by life stage, Percentage, All respondents



C1. How well, if at all, do you know what there is to see and experience on a holiday or short break in each of these parts of the UK and Ireland? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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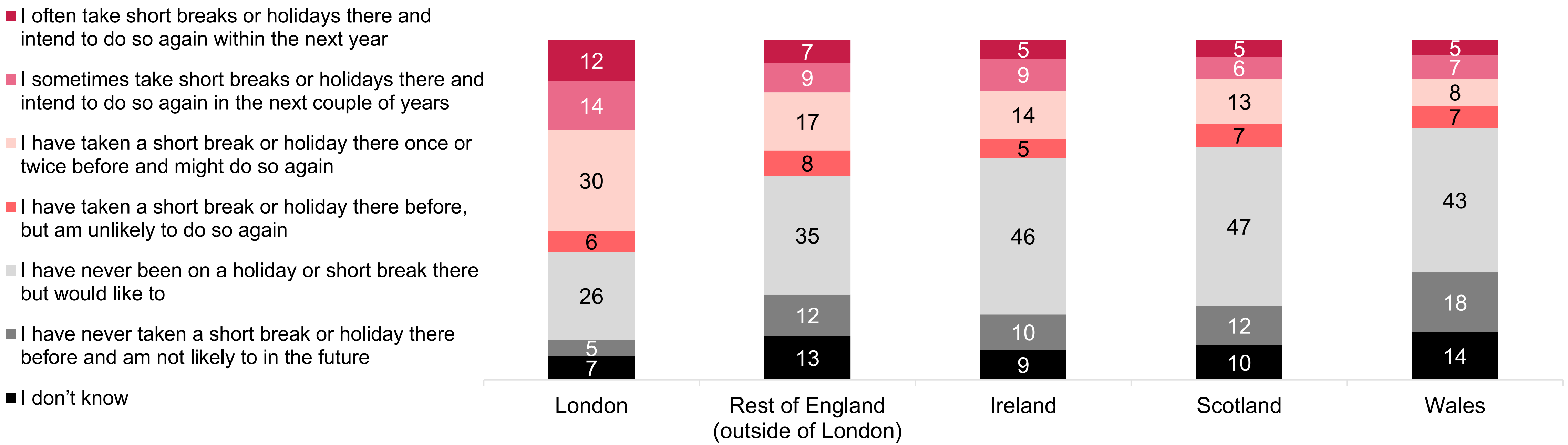
Loyalty with Wales and other destinations

- Of the destinations tested, London is the most likely to generate regular holidays or short breaks, with around a quarter (26%) of the French holiday market 'often' or 'sometimes' going there, and over 3 in 5 (62%) having been there at some point in the past. Wales is the part of the UK and Ireland least likely to have attracted visits from the French market, although the proportion visiting 'often' or 'sometimes' is similar to Scotland.
- Positively, 43% of the French holiday market have never been to Wales for a holiday but would like to, suggesting strong potential to attract new visitors. That said, 18% have never been and are not likely to - the largest proportion of all the tested destinations.

Figure 28. Relationship with each destination, Percentage, All respondents



C3. Which of the following statements best applies to you when it comes to visiting these destinations? All data weighted.
Base: All respondents n=1,007

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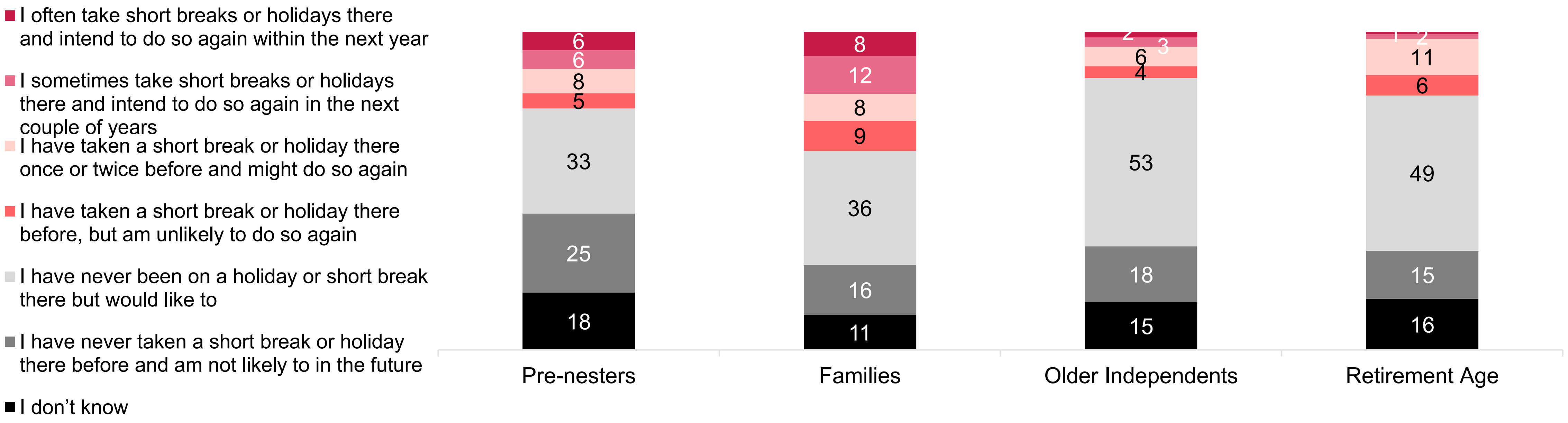
Loyalty with Wales by life stage

- Families are the most likely to report ‘often’ or ‘sometimes’ taking short breaks or holidays to Wales (20%), and are also the most likely to have visited Wales at some point in the past. Older independents and retirees are the least likely to report visiting Wales ‘often’ or ‘sometimes’, closely followed by pre-nesters.
- Over half of older independents have never been to Wales and would like to, suggesting there is strong potential to convert individuals in this life stage to visitors. Perhaps notably, pre-nesters are the life stage the most likely to ‘reject’ a holiday or short break in Wales, in contrast with other destinations tested within this research.

Figure 29. Relationship with Wales by life stage, Percentage, All respondents



C3. Which of the following statements best applies to you when it comes to visiting these destinations? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

Previous visits to each destination

- London was the most visited overnight destination from the French holiday market in 2020-2023, 25% having visited. 10% stated they visited Wales in that period – the lowest of all destinations tested, although only marginally behind Scotland (12%) and Ireland (also 12%).

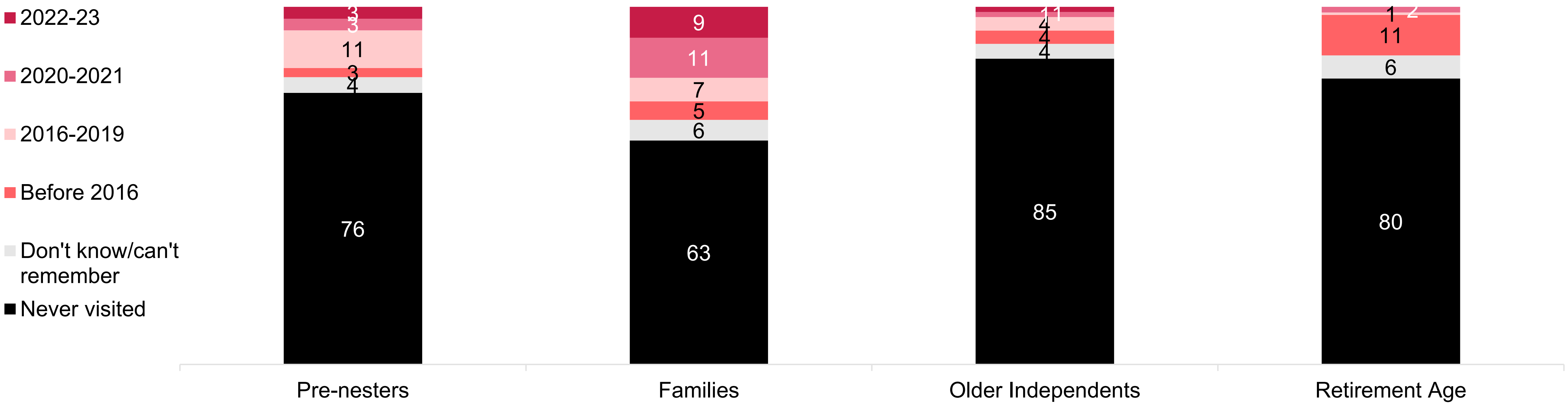
Figure 30. Previous visits to each destination, Percentage, All respondents

C4. When did you last visit these places for a holiday or short break? All data weighted.
Base: All respondents n=1,007

Previous visits to Wales by life stage

- Aligned with general familiarity with Wales as a destination, families are the life stage most likely to have taken a trip in Wales from 2020 to 2023 (20% saying they have done so).
- Retirees show the lowest level of recent visitation but report relatively high visits before 2016 (at 11%). This does suggest there may be an opportunity to 'reactivate' these older life stages.

Figure 31. Previous visits to WALES by life stage, Percentage, All respondents



C4. When did you last visit these places for a holiday or short break? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

Previous visits to each destination by life stage and segment

- Amongst the family life stage, Wales has similar previous visitation to Scotland and Ireland. However, amongst other life stages, previous visits to Wales are lower than to other destinations. Families index highest compared to other life stages on previous visitations to all the UK destinations.
- Amongst segments, Wales has the highest visitation from Experience Seekers at 33%, followed closely by Cultural Buffs (32%).

Figure 32. Previous visits to destinations by life stage, Percentage, All respondents

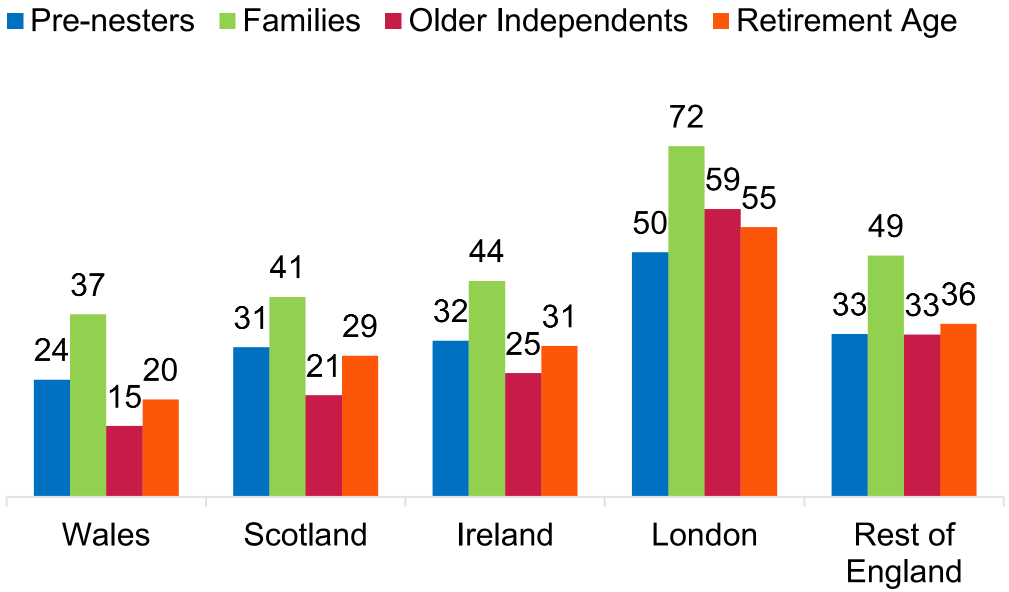
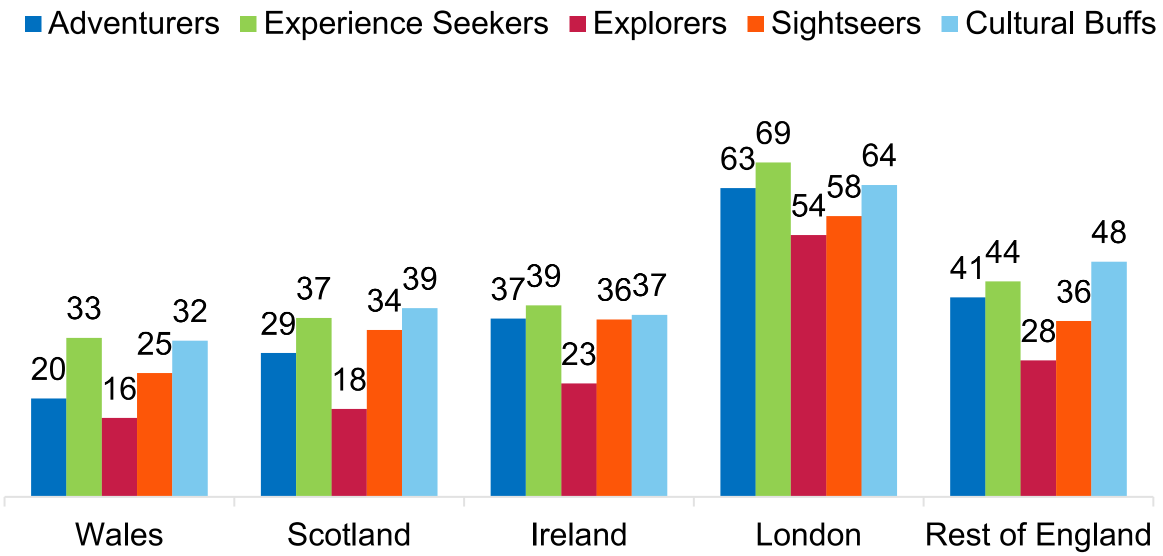


Figure 33. Previous visits to destinations by segment, Percentage, All respondents



C3. Which of the following statements best applies to you when it comes to visiting these destinations? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135; Adventurers n=201; Experience Seekers n=289; Explorers n=214; Sightseers n=104; Cultural Buffs n=199

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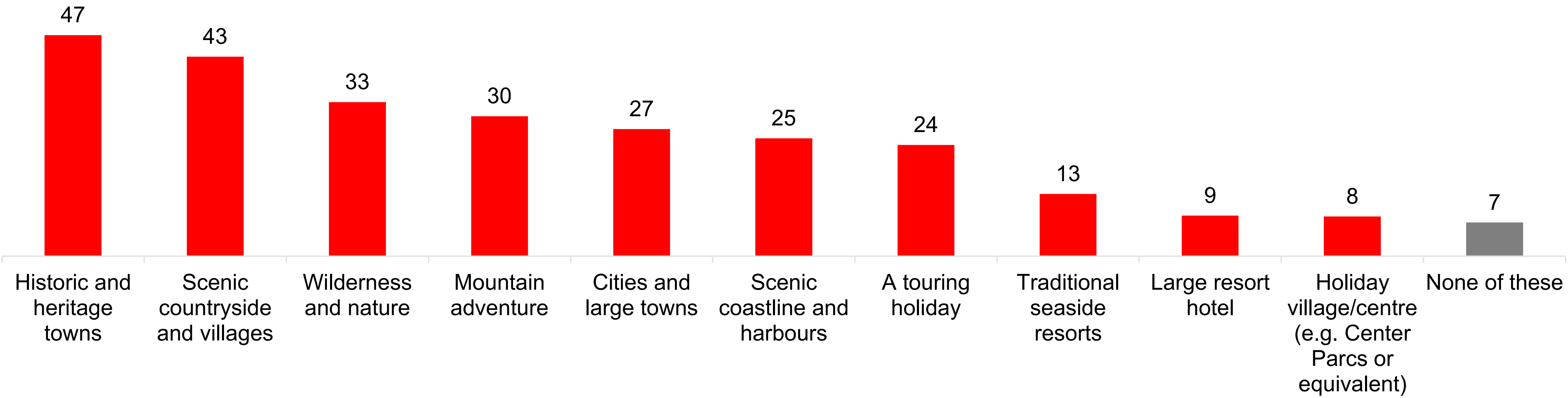
Destination Associations and Preferences

Destination types associated with Wales

- The French market mostly associate Wales with 'historic and heritage towns' (47%), followed by 'scenic countryside and villages' (43%) and 'wilderness and nature' (33%).
- They are least likely to associate Wales with 'large resort hotels' and 'holiday village/centres', although this will in part reflect the lack of relevance of these destination types to the French market.

Figure 34. Destination associations with Wales, Percentage, All respondents



D1. Which, if any, of these places do you most associate with these destination types? All data weighted.
Base: All respondents n=1,007

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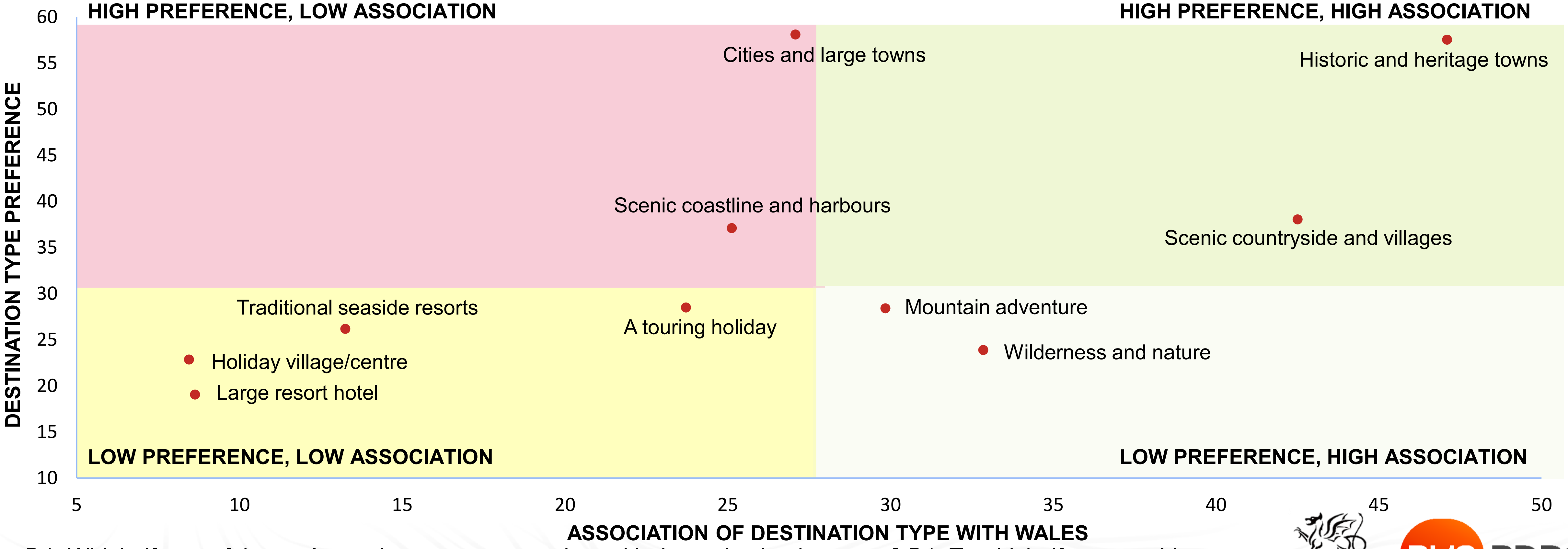
Destination types associations against preferences

- Of the types of destinations the French holiday market show the most interest in, Wales has stronger associations with ‘historic and heritage towns’ and ‘scenic countryside and villages’. ‘Mountain adventure’ and ‘wilderness and nature’ are also relatively strongly associated with Wales, although their appeal is more limited within the French market.
- The French holiday market does not strongly associate Wales as a destination with ‘cities and large towns’, or ‘scenic coastline and harbours. Wales also has relatively weak associations with ‘touring holidays’ and ‘traditional seaside resorts’.

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



D1. Which, if any, of these places do you most associate with these destination types? B1. To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents considering each destination

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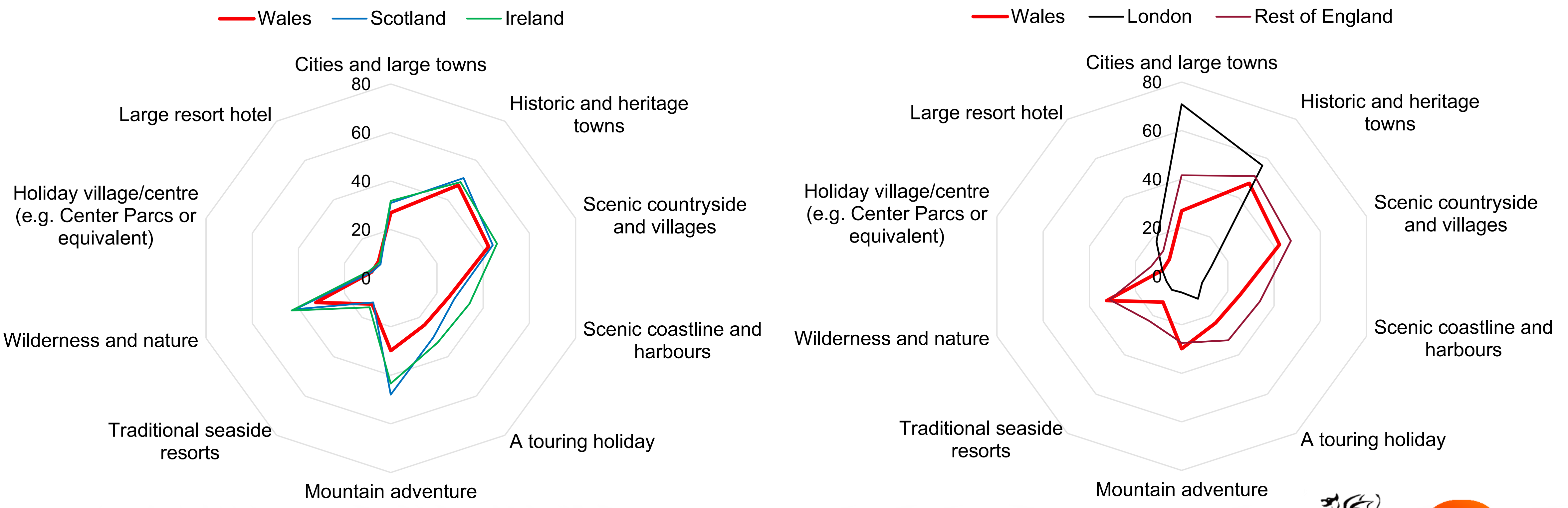
Destination types associated with selected UK destinations

- Relative to other destinations, Wales has lower associations for most holiday types. It only makes the top 3 for ‘mountain adventure’, ‘traditional seaside resorts’, ‘wilderness and nature’ and ‘large resort hotel’.
- Ireland is the destination most strongly associated with ‘scenic coastline and harbours’, ‘a touring holiday’ and ‘wilderness and nature’ whereas Scotland is most strongly associated with ‘mountain adventure’.
- London & the Rest of England are the destinations most strongly associated with ‘cites and large towns’ and ‘historic and heritage towns’, whereas Wales has the lowest association with these.

Figure 36. Destinations most strongly associated with each destination type*, All respondents considering each destination type

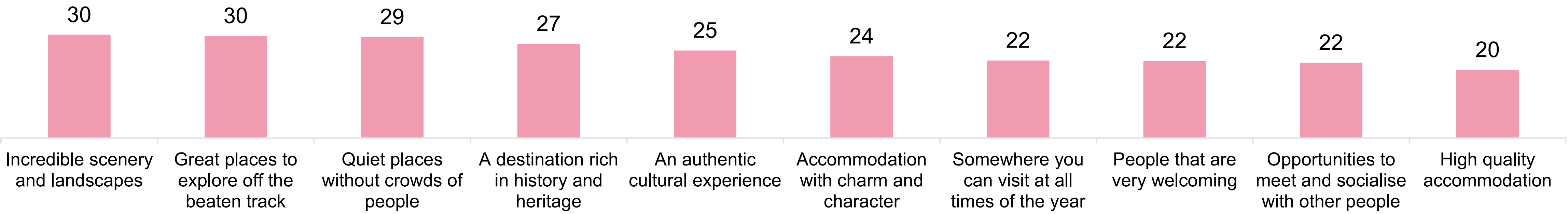


D1. Which, if any, of these places do you most associate with these destination types? All data weighted.
Base: All respondents n=1,007
*Ordered clockwise in order of importance to French market

Destination influences associated with Wales

- In terms of destination influences, Wales is most associated with ‘incredible scenery and landscapes’ and ‘great places to explore off the beaten track’ both generating an association of 30%. ‘Quiet places without crowds’, ‘a destination rich in history and heritage’, and ‘an authentic cultural experience’ also make the top 5 associations.

Figure 37. Destination influence associations with Wales, Percentage, Top 10, All respondents



D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,007

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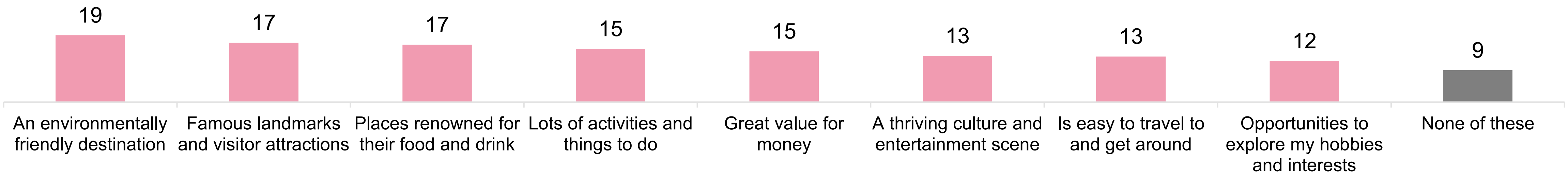
Destination influences associated with Wales

- Wales has weaker associations with ‘opportunities to explore my hobbies and interests’, ‘is easy to travel to and get around’ and ‘a thriving culture and entertainment scene’.

Figure 38. Destination influence associations with Wales, Percentage, Bottom 8, All respondents



D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,007

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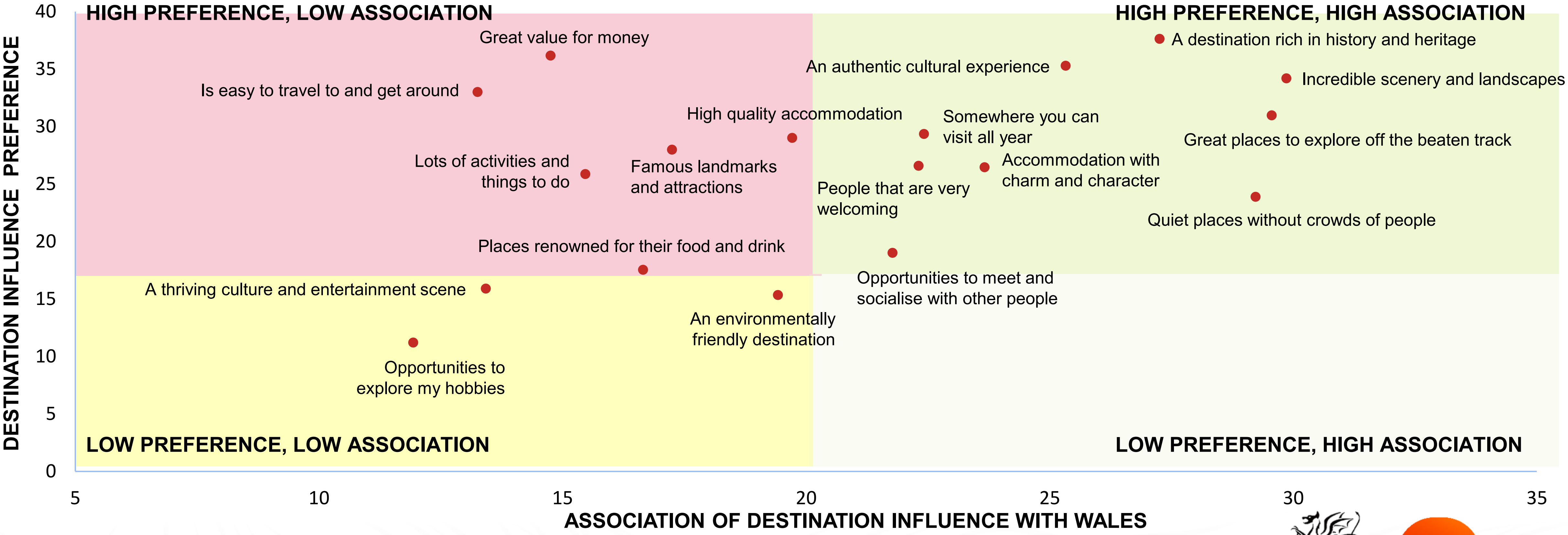
Destination influence associations against preferences

- Relative to the French market's preferences, Wales has stronger associations with influences related to history, culture and heritage, and the outdoors, as well as being a place you can visit all year round and for having accommodation with charm and character. Influences related to people – such as being welcoming and opportunities to socialise – also score well.
- Of the other influences important to the French market, Wales has weaker associations with being easy to travel to, offering lots of activities, places renowned their for food and drink, famous landmarks, and high quality accommodation. Value for money ratings are also low, but this is the case for all destinations tested in this research.

Figure 39. Wales destination influence association against destination influence preference, Percentage, All respondents

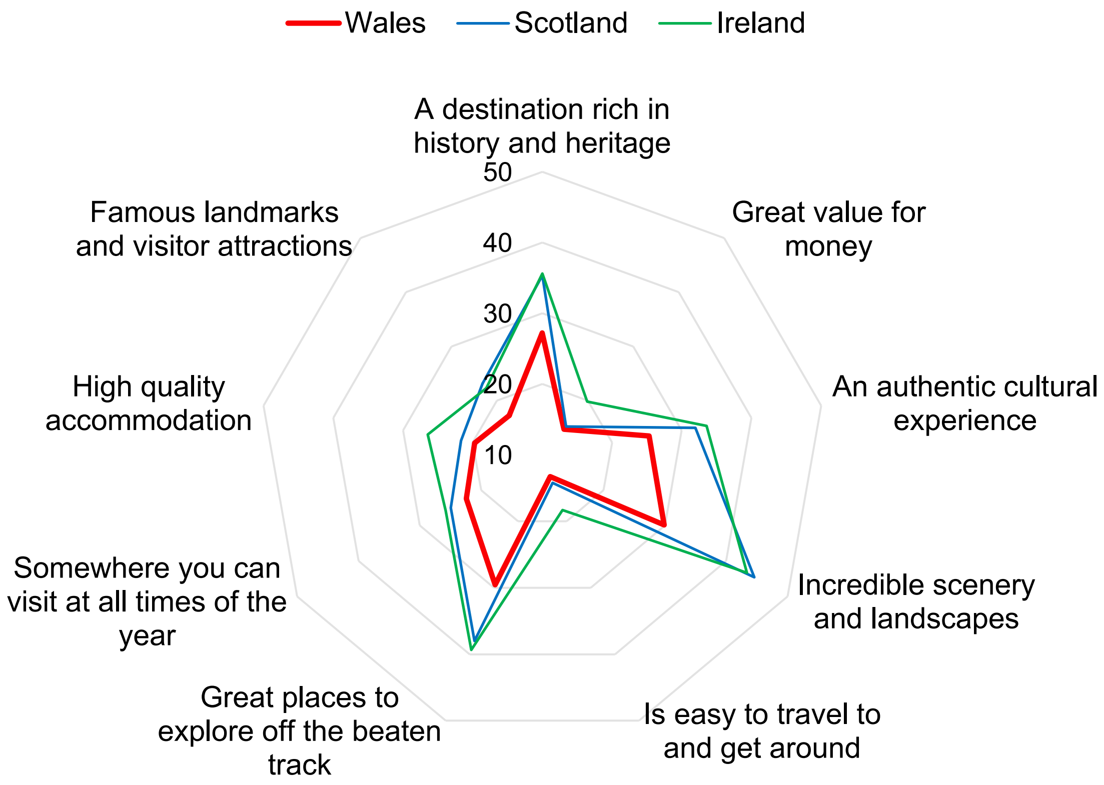


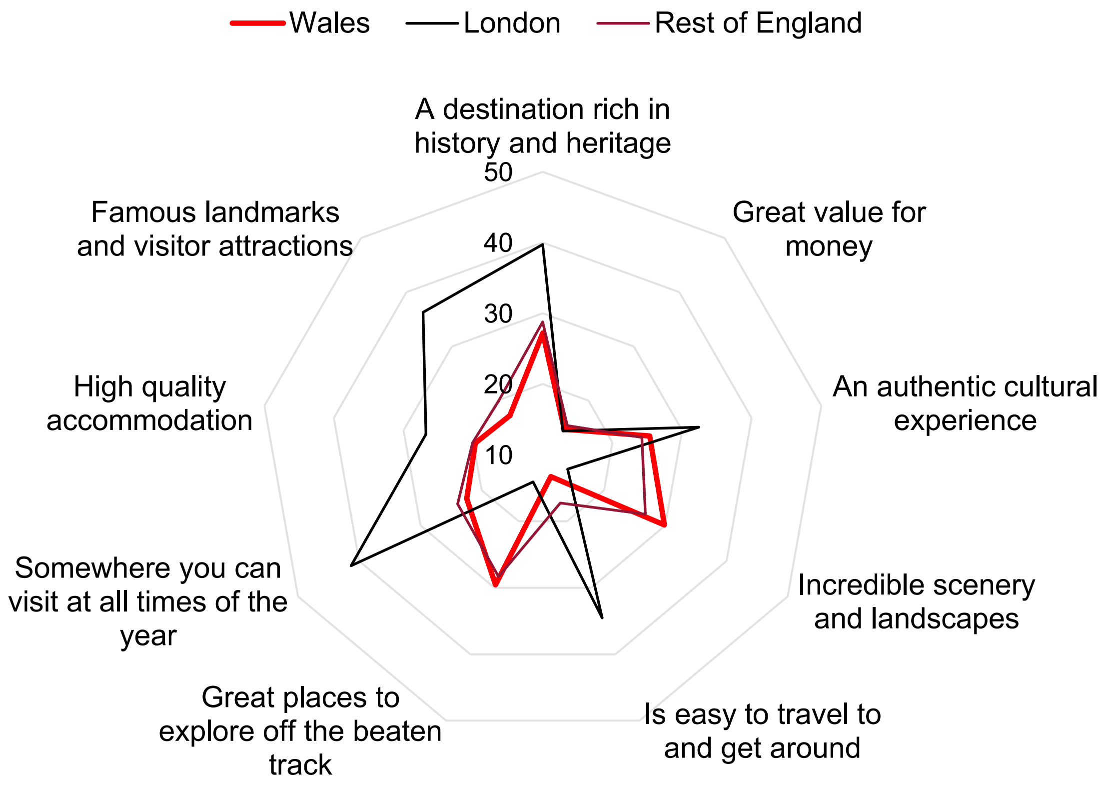
D2. Which, if any, of these places do you most associate with each influence? B2. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted.
Base: All respondents n=1,007

Destination associations – trip influences

- Although Wales has strong associations with ‘incredible scenery and landscapes’ and ‘great places to explore off the beaten track’, Scotland and Ireland both have considerably stronger associations in these areas.
- London is most strongly associated with ‘a destination rich in history and heritage’, ‘is easy to travel to and get around’, ‘somewhere you can visit at all times of the year’ and ‘famous landmarks and visitor attractions’ – these are some of the influences with which Wales is most weakly associated.

Figure 40. Destinations most strongly associated with each trip influence*, Top 9 in order of importance, All respondents





D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,007
*Ordered clockwise in order of importance to French market

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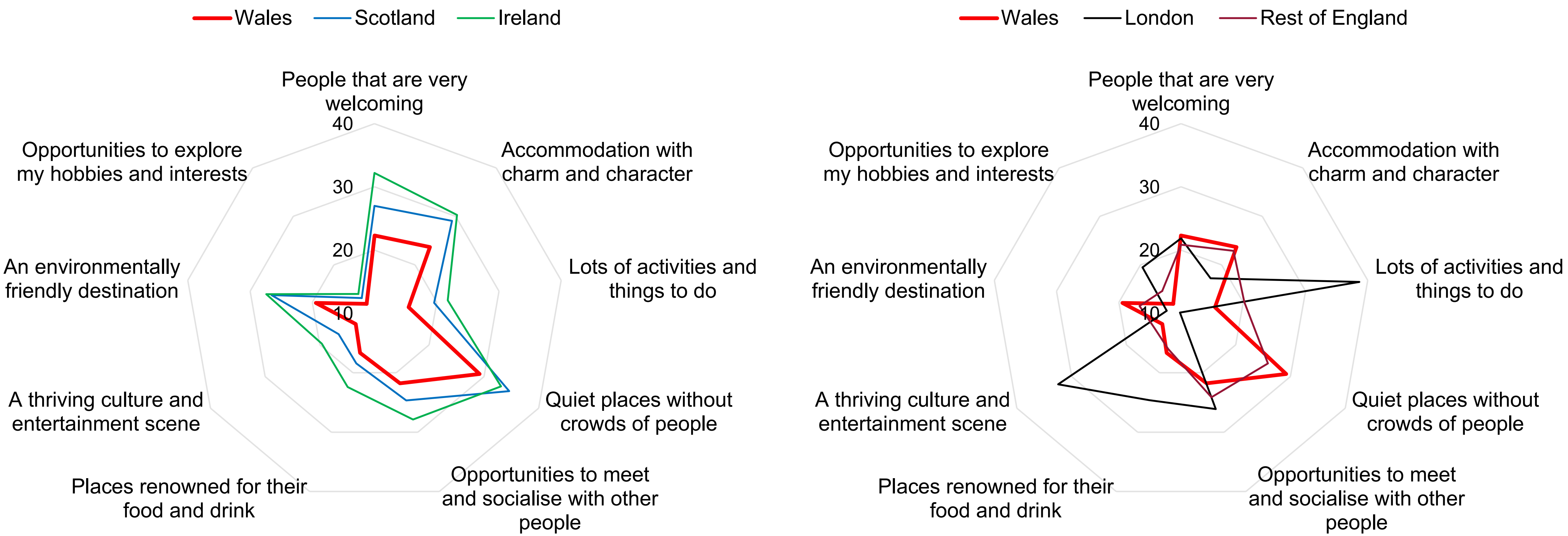
Destination associations – trip influences

- Scotland, Ireland and Wales have a similar overall pattern of associations with other trip influences. However, Wales is behind Scotland and Ireland on all the factors.
- London is notable for its strong associations with ‘lots of activities and things to do’, ‘places renowned for their food and drink’, ‘a thriving culture and entertainment scene’ and ‘opportunities to explore my hobbies and interests’.

Figure 41. Destinations most strongly associated with each trip influence*, Bottom 9 in order of importance, All respondents



D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,007
*Ordered clockwise in order of importance to French market

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Experiences associated with Wales

- In relation to experiences, Wales is most strongly associated with ‘learning about local history and culture’ and ‘walking, hiking or rambling’ - at 33% and 32% respectively. It also has strong associations with ‘nature and wildlife experiences’, ‘exploring scenic areas by car’, and ‘visiting heritage sites or cultural attractions’.

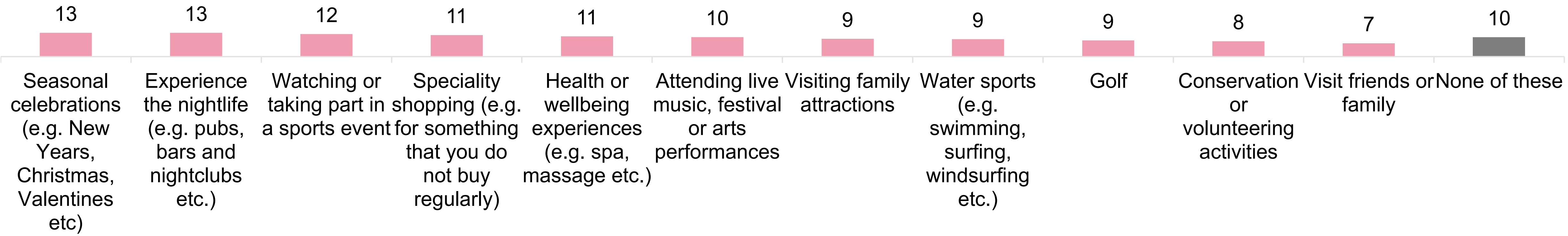
Figure 42. Experience associations with Wales, Percentage, Top 12, All respondents

D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,007

Experiences associated with Wales

- Associations are weaker for ‘visiting friends and family’ and ‘conservation or volunteering activities’, although this will in part be linked to low relevance to the French market overall.

Figure 43. Experience associations with Wales, Percentage, Bottom 11, All respondents

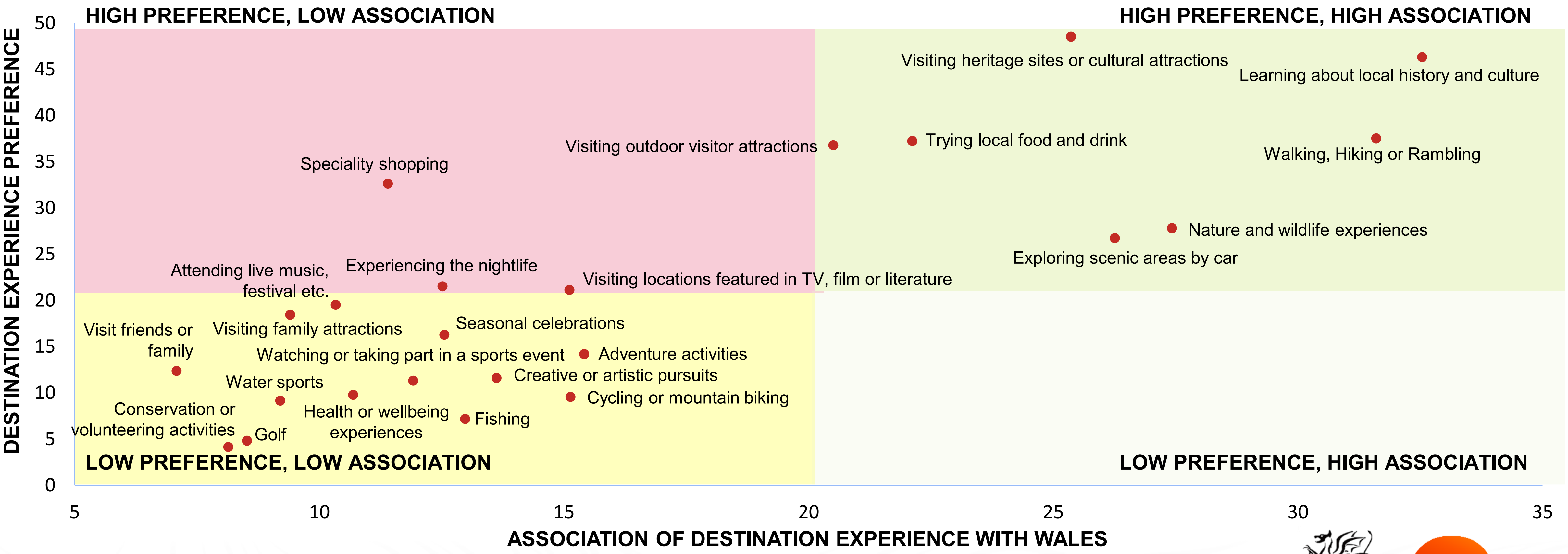


D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,007

Destination experience associations against preferences

- Wales has generally stronger associations with the majority of destination experiences that are of high importance to the French market, in particular those relating to history, heritage and activities within nature. It has weaker associations with 'visiting outdoor visitor attractions' and experiences relating to city destinations – such as 'speciality shopping, 'experiencing the nightlife' and 'attending live music'.

Figure 44. Wales destination experience association against destination experience preference, Percentage, All respondents



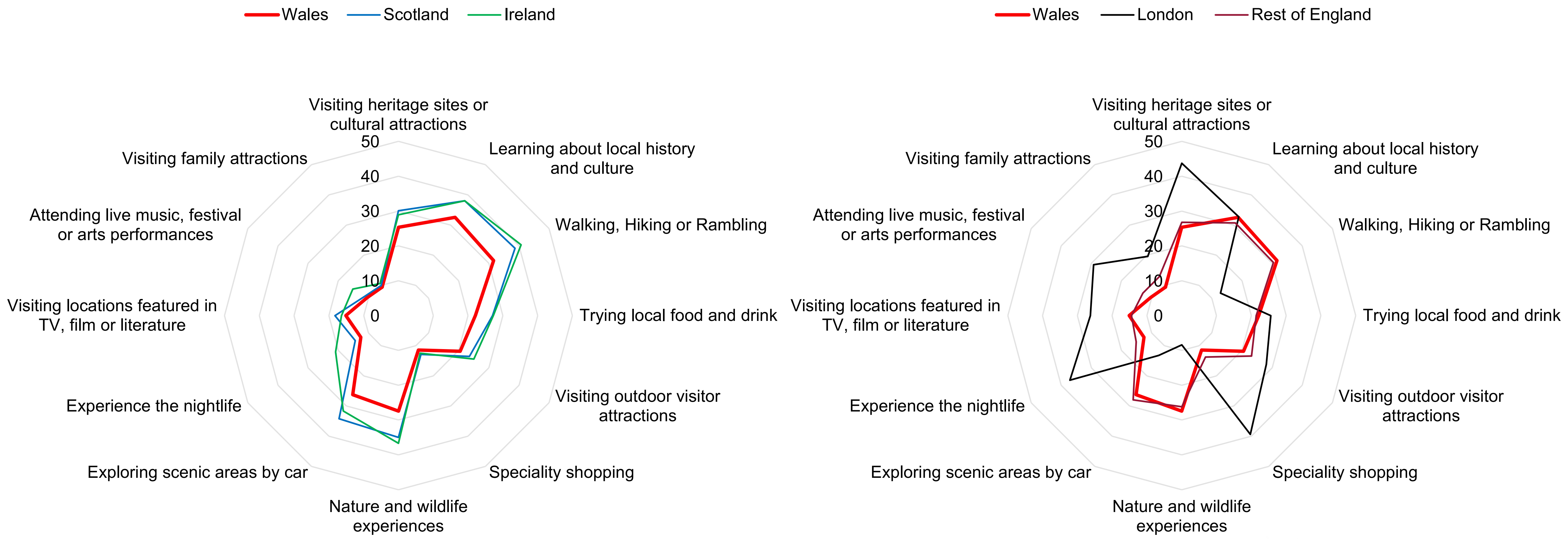
D3. And which, if any, of these places do you think are best suited to these holiday experiences? B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted. Base: All respondents n=1,007

Llywodraeth Cymru Welsh Government

Destination associations – trip experiences

- Similar to trip influences, Wales has a similar pattern of associations to Scotland and Ireland but tends to score lower on each experience. This extends to experiences in nature and relating history or heritage, areas where Wales is most likely score strongly on.
- Unsurprisingly and consistent with influences and destination types, London scores higher for typically city-based activities.

Figure 45. Destinations most strongly associated with each trip experience*, Top 12 in order of importance, All respondents

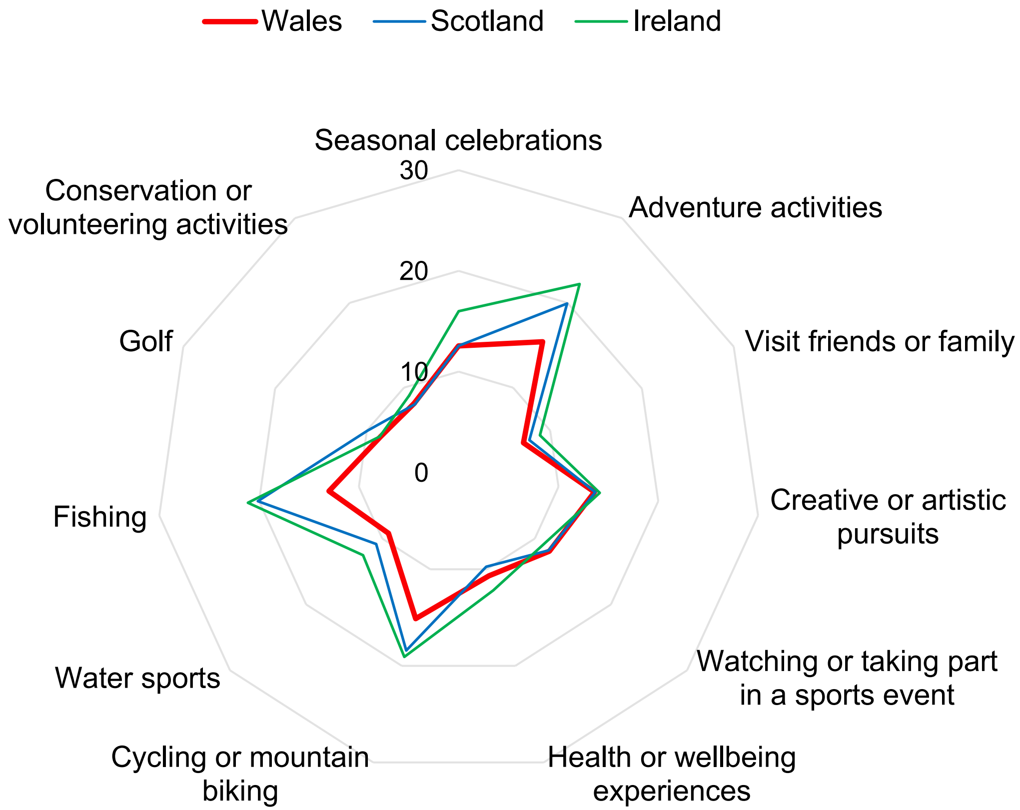


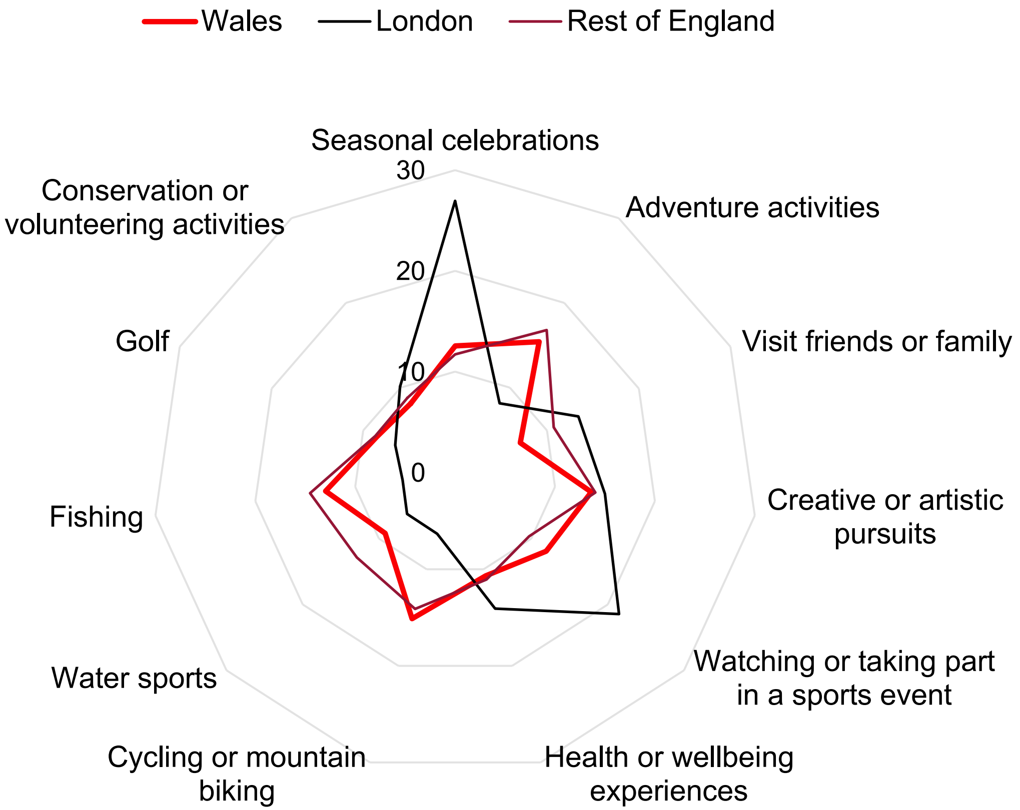
D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,007
*Ordered clockwise in order of importance to French market

Destination associations – trip experiences

- London dominates as a destination associated with ‘seasonal celebrations’ and ‘watching or taking part in a sport event’.
- Scotland, Wales and Ireland share similar associations. Wales is ranked joint 2nd with Scotland as somewhere to ‘watch or take part in a sports event’.

Figure 46. Destinations most strongly associated with each trip experience*, Bottom 11 in order of importance, All respondents





D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,007
*Ordered clockwise in order of importance to French market

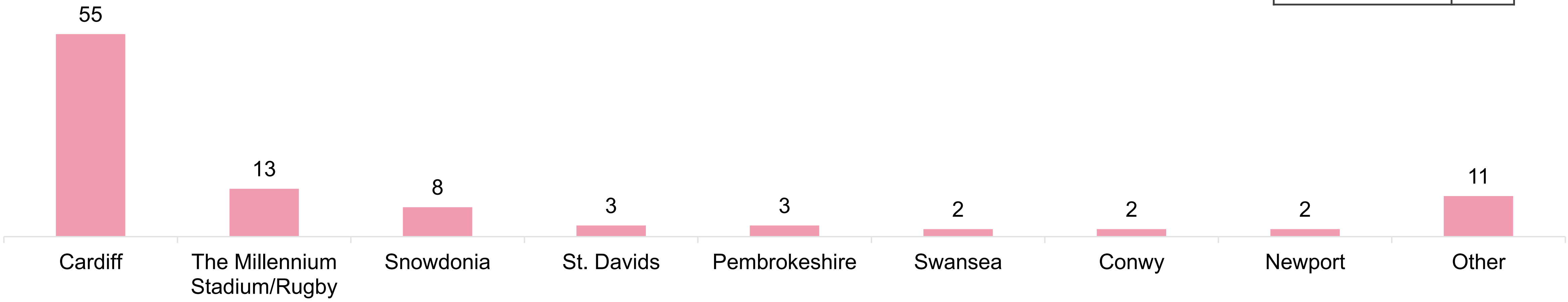
Llywodraeth Cymru
Welsh Government

Places for holidays or short breaks in Wales

- When asked to name places in Wales associated with holidays and short breaks, only 15% of the French holiday market were able to name specific places. They were most likely to think of Cardiff when they think of Wales as a place to take a holiday or short break (55%), followed by The Millennium Stadium/Rugby (13%), likely relating to links during the Six Nations rugby.
- Despite 'historic and heritage towns' being the 2nd most popular destination type, only 3% spontaneously mentioned St David's. Similarly, just 8% spontaneously mentioned Snowdonia, despite scenic countryside being a popular destination type.

Figure 47. Specific places associated with Wales, Percentage of mentions, All respondents that could name a place in Wales

Nothing in particular comes to mind	56%
Don't know/not sure	15%



E2. When you think of Wales as a place to take holidays and short breaks, which specific places come to mind? All data weighted. Base: All respondents n=1,007
Note: All responses under 1% are combined into 'other'.

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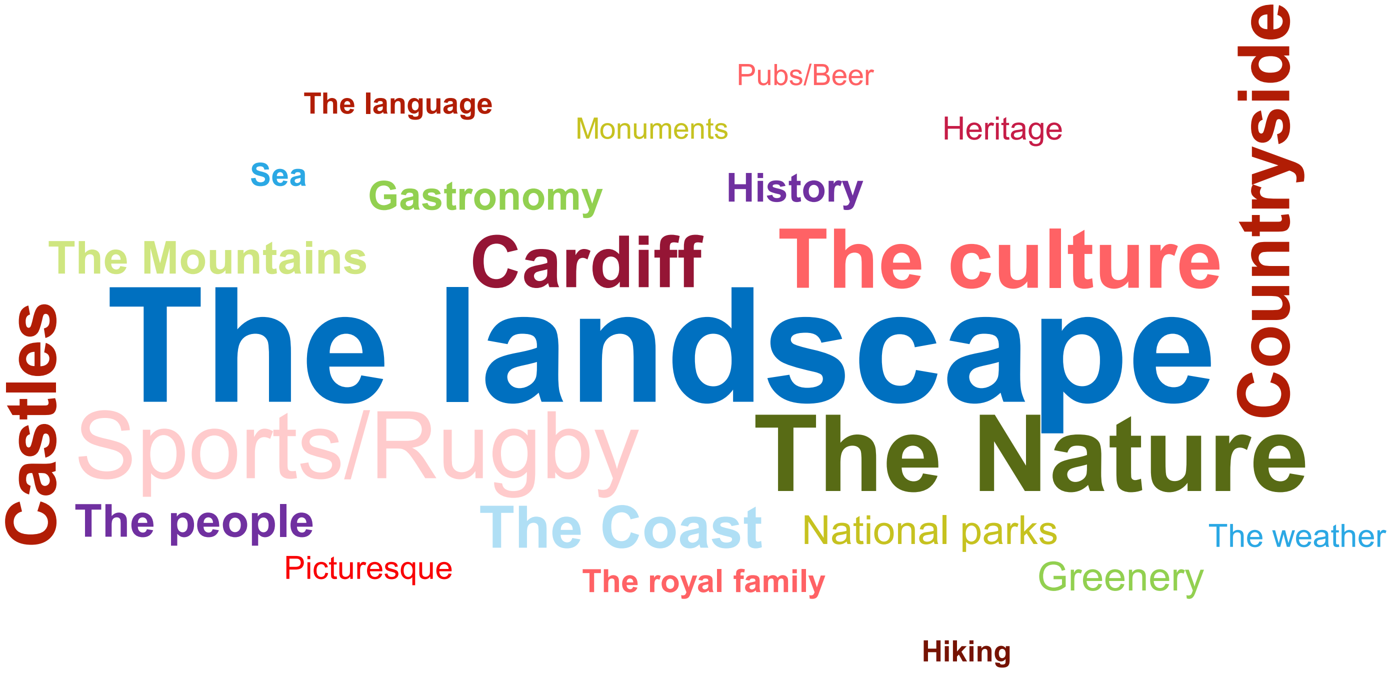
Wales as a destination

- When asked to describe what is most appealing about Wales as a holiday, the majority of the French market did not name anything specifically. However, of those that could, areas of natural beauty, sports and culture were the most prevalent. Notably, a small proportion of respondents mentioned ‘the language’ and ‘the people’.

Figure 48. Most appealing about Wales as a holiday or short break destination, All respondents

Nothing in particular comes to mind	45%
Don’t know/not sure	20%



E2b. What would you say is most appealing about Wales as a holiday or short break destination?
Base: All respondents n=1,007

Future visits to Wales

Trips intended to Wales in next few years

- 6% of the French market state they have already booked a holiday or short break in Wales in the next few years. Just over a quarter (26%) are 'very interested – but have not yet booked'.
- 11% of the French market that are interested in taking a Wales trip state they are planning on doing so in 2023, with the vast majority planning their trip from 2024 onwards – 35% in 2024.
- Although 34% of the French market are planning a UK trip in 2023, only 11% of those interested in a Wales trip will take their trip in 2023 – Wales trip intenders are not planning to take their trips as soon as UK trip intenders are.

Figure 49. Wales trip intended in the next few years, Percentage, All respondents

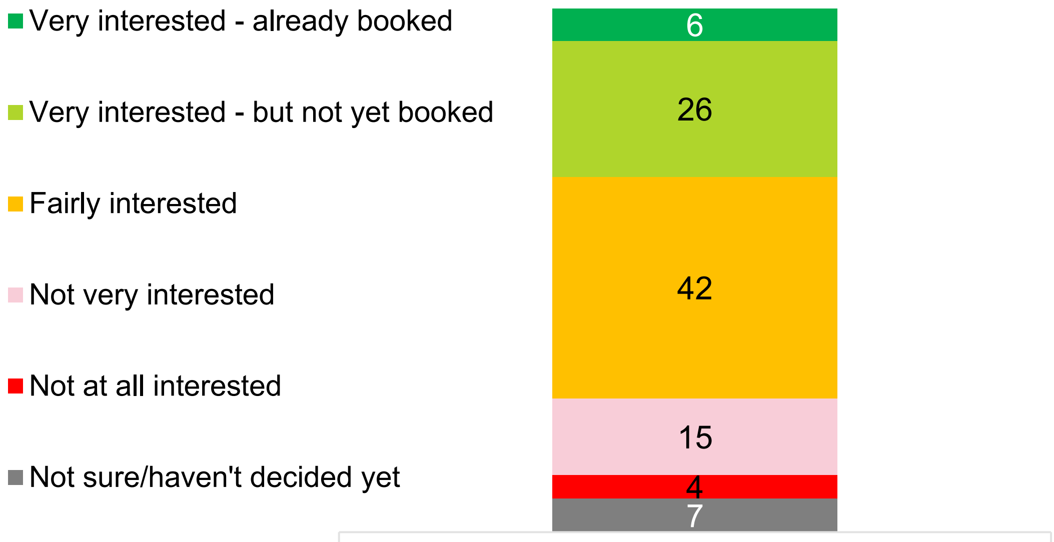
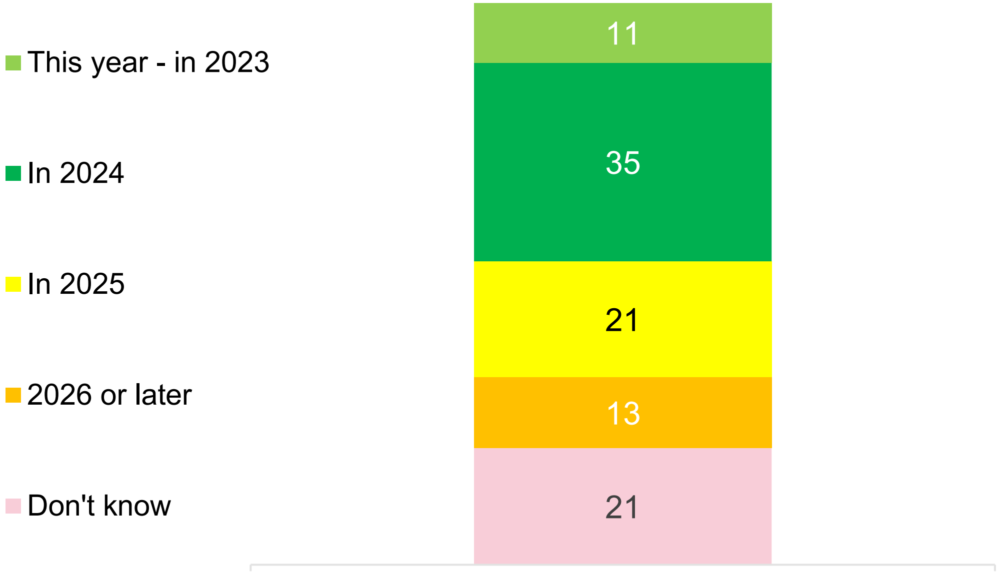


Figure 50. When planning to take a Wales trip in the next few years, Percentage, All Wales trip intenders



F1. How interested, if at all, would you be in taking a holiday or short break in Wales in the next few years?
F2. And when are you next most likely to visit Wales for a holiday or short break? All data weighted.
Base: All respondents n=1,007. All Wales trip intenders n=747.

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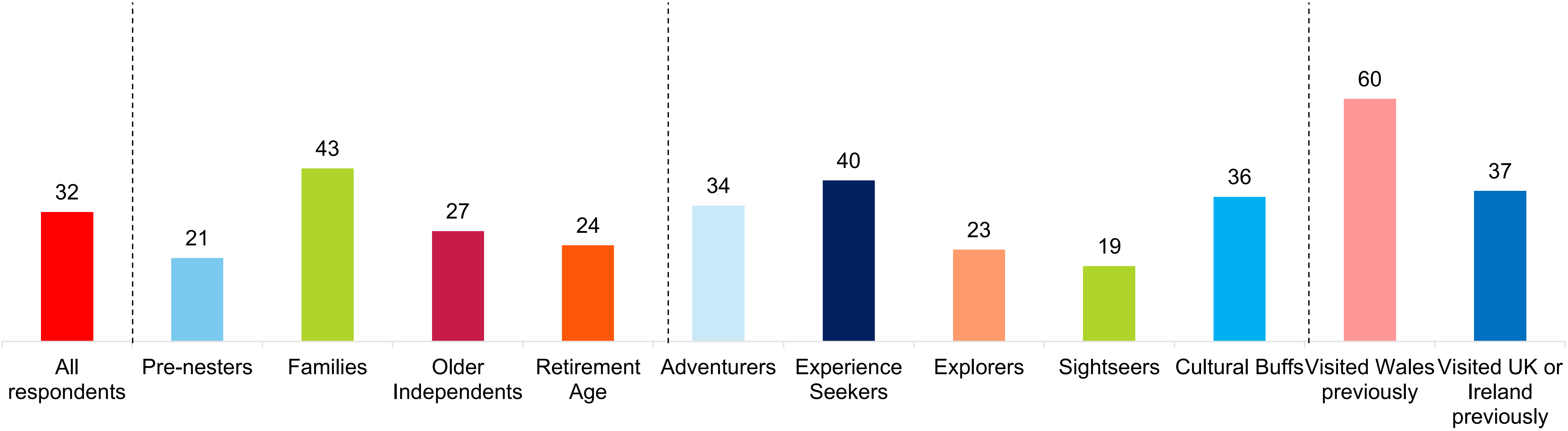
Welsh Government

Trips intended to Wales in next few years – by sub-group

- Families are the life stage most likely to be ‘very interested’ in taking a Wales holiday/short break in the next few years – with more than 2 in 5 (43%) intending to do so. Pre-nesters, older independents and retirees express similar interest in a future Wales trip – around 1 in 4 reporting that they would be ‘very interested’ in doing so in the next few years.
- Experience Seekers are the segment most likely to be ‘very interested’ in taking a Wales holiday/short break in the next few years – with 40% intending to do so, closely followed by Cultural Buffs at 36%.
- Members of the French holiday market that had visited Wales previously are considerably more likely to visit Wales than those that hadn’t – previous UK visitors are marginally more likely to do so.

Figure 51. Very interested in visiting Wales in next few years by sub-group, All respondents



F1. How interested, if at all, would you be in taking a holiday or short break in Wales in the next few years? All data weighted.
Base: Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135; Adventurers n=201; Experience Seekers n=289; Explorers n=214; Sightseers n=104; Cultural Buffs n=199; Visited Wales before n=254; Visited UK before n=725

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Trip length and months intending to take a trip in Wales

- Anticipated overnight visits to Wales from the French market are at their highest between May and September. Off-peak trips to Wales are of limited interested to the French market, intention dropping considerably outside peak months. There is some variation by life stage however – pre-nesters and families are most likely to visit in July, with older independents and retirees preferring to visit outside the summer holidays in June and September.
- The majority (59%) of anticipated overnight trips to Wales are stays of 4-7 nights, although around 1 in 5 (20%) anticipate a longer break of 8+ nights.

Figure 52. Months intending to take next trip in Wales, Percentage, All Wales trip intenders

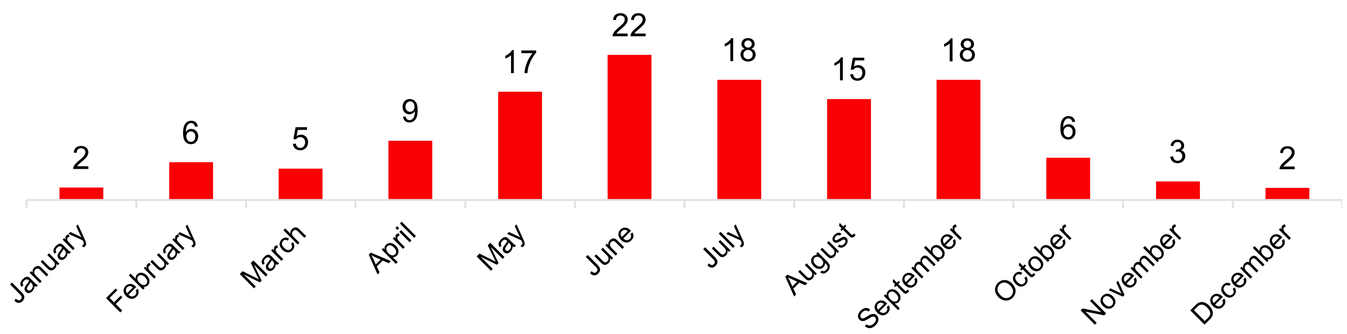
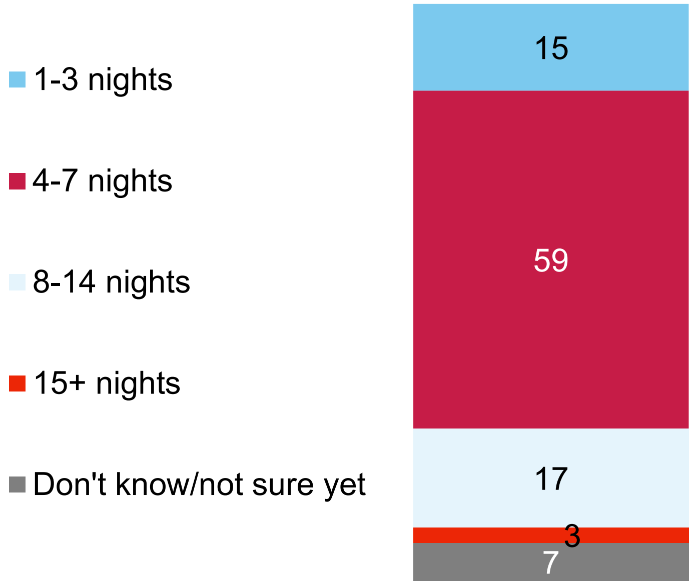


Figure 53. Trip length of next intended Wales trip, Percentage, All Wales trip intenders



F3. In which, if any, of these months of the year do you anticipate taking your next overnight trip in Wales?
F4. Roughly how many nights do you anticipate spending on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=747

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Welsh Government

Visitor party make-up for next Wales trip

- Over half (55%) of Wales trip intenders plan on visiting Wales with their partner, with 31% likely to do so with their children or grandchildren. 1 in 6 (16%) plan on travelling with friend/s.
- The vast majority (59%) of French visitors would expect to travel to Wales 'independently', with a further 1 in 5 (20%) anticipating travelling 'as part of an escorted or organised tour with a travel company'. Just 8% would expect to travel as part of an organised group. Families and Sightseers show the highest interest in travelling as part of a group, although there is limited variation by life stage and by VisitBritain segment.

Figure 54. Visitor party make-up for next Wales trip, Percentage, All Wales trip intenders

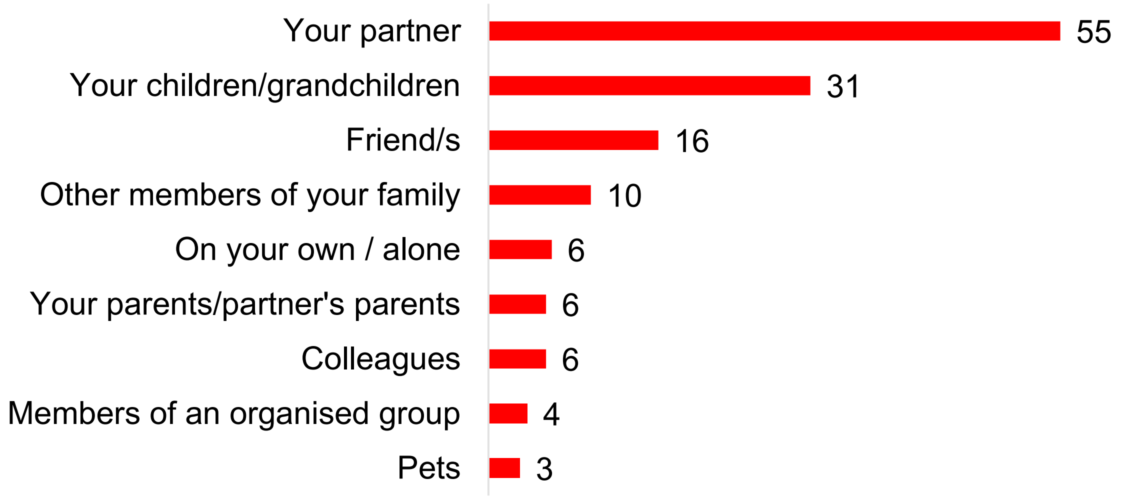
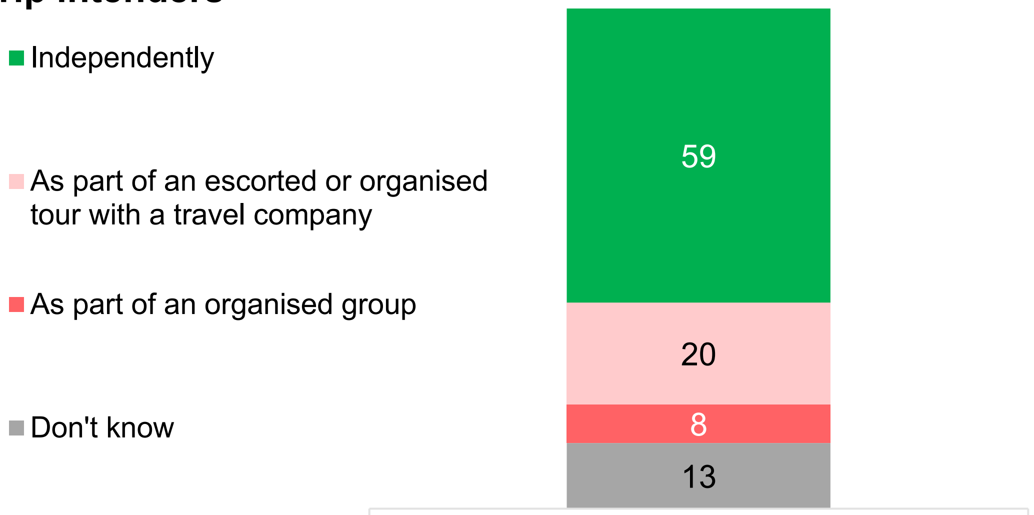


Figure 55. Likely company on your next overnight trip in Wales, Percentage, All Wales trip intenders



F5. Who, if anyone, is likely to accompany you on your next overnight trip in Wales?
F5b. Which of the following best describe how you are most likely to travel around Wales on your next overnight trip there? Don't knows removed All data weighted.
Base: All Wales trip intenders n=747

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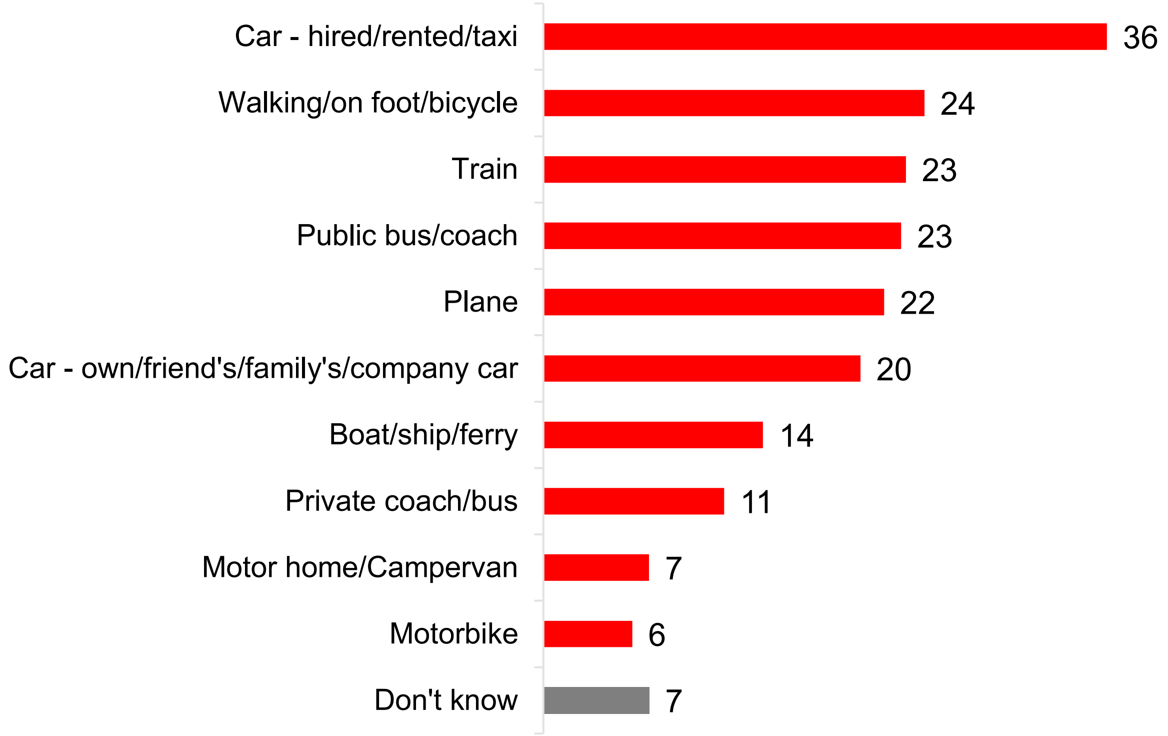
Intended ways to travel during next Wales trip

- Wales trip intenders are mostly likely to travel around Wales in a ‘car – hired/rented/taxi’ (36%), ‘walking/bicycle’ (24%), ‘train’ (23%) and ‘public bus/coach’ (23%). Over 1 in 3 (35%) would anticipate using public transport on their trip.
- Retirees are more likely to travel around via ‘car – hired/rented/taxi’ than other life stages, with 54% planning to do so.

Figure 56. How travel around for next Wales trip, Percentage. All Wales trip intenders



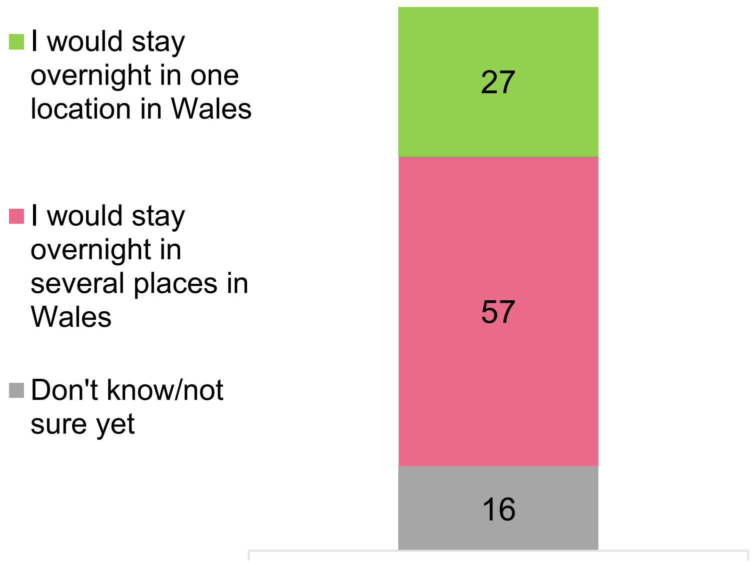
Net: Public transport 35%

F12. How are you most likely to travel around Wales on your visit? All data weighted.
Base: All Wales trip intenders n=747

Anticipated destination for next Wales trip

- Mid Wales is the region of Wales likely to attract the highest number of overnight visits from the French market (with 32% of potential trip takers expecting to stay there there), followed by South East Wales (at 22%).
- Of those planning on staying overnight in Wales, 27% of plan on staying in one Wales location on their trip and nearly 3 in 5 (57%) would stay overnight in several places. Around 1 in 6 are unsure.
- Younger life stages are more likely to stay overnight in one location in Wales.

Figure 57. Type of trip intended on next Wales trip, Percentage, All Wales trip intenders



F7. Which of these areas do you plan on staying overnight on your overnight trip in Wales? F6. Which of the below best describes the number of places you are likely to stay in on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=747

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BVA BDRC

Intent to visit elsewhere in UK or Ireland

- 27% of Wales trip intenders intend to stay elsewhere in the UK and Ireland before visiting Wales and a similar number (28%) intend to stay elsewhere in the UK and Ireland after visiting Wales.
- The majority (63%) of these individuals intend to stay in London, buy a large minority (around 2 in 5) also plan on visiting Scotland, Ireland or the rest of England. On average, Wales intenders are considering visiting two parts of the UK in addition to Wales.

Figure 58. Intention to visit elsewhere in UK or Ireland as part of the same trip, Percentage, All Wales trip intenders

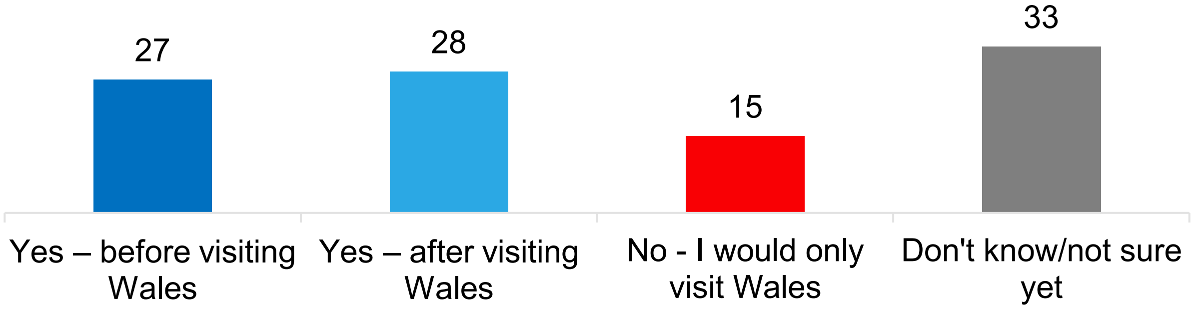
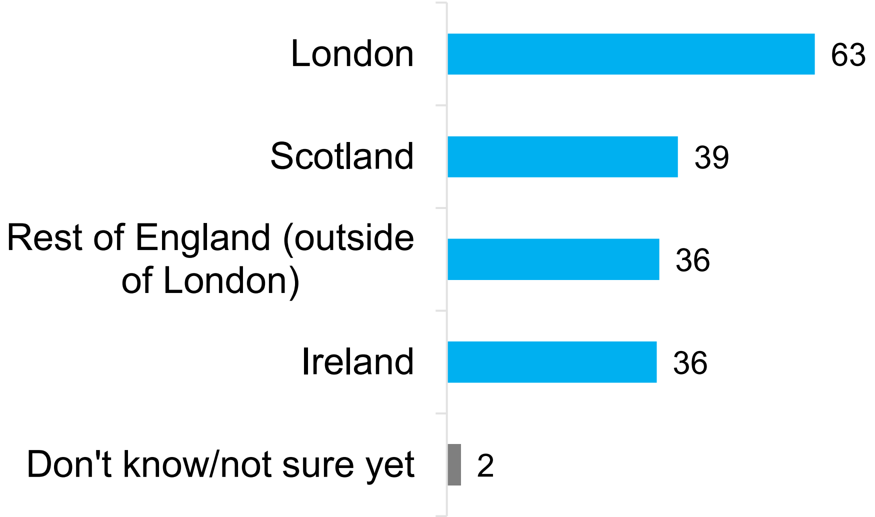


Figure 59. Where else intended to stay in UK or Ireland, Percentage, All Wales trip intenders anticipated to stay elsewhere



F13. Would you anticipate staying overnight in any other parts of the UK or Ireland as part of your trip to Wales?
F14. Where else in the UK or Ireland would you anticipate staying overnight on this trip? All data weighted.
Base: All Wales trip intenders n=747; All planning to stay elsewhere in the UK n=375

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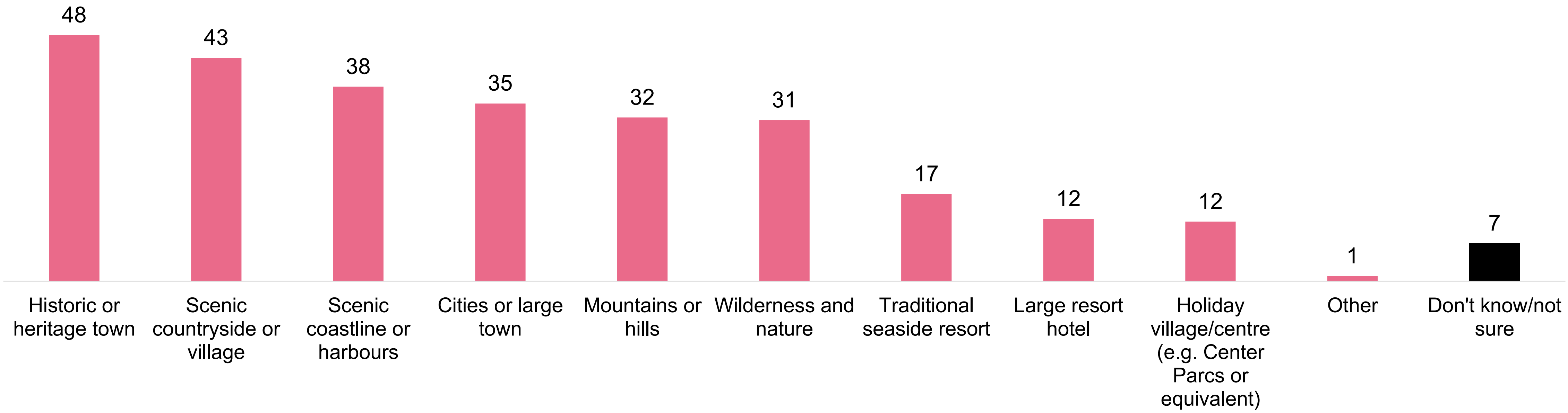
Destination preference for next Wales trip

- The most popular destination types that Wales intenders plan on staying in are 'historic or heritage town' and 'scenic countryside or village' (48% and 43%), followed closely by 'scenic coastline or harbours', 'cities or large town', 'mountains or hills' and 'wilderness and nature'. Older independents and retirees are more likely to favour staying in a 'historic or heritage town', 'scenic countryside or village' and 'scenic coastline or harbours'. There is limited variation by life stage for other destination types, although pre-nesters index higher for 'large resort hotels'.

Figure 60. Type of destination of those intending to take a trip in Wales, Percentage, All Wales trip Intenders

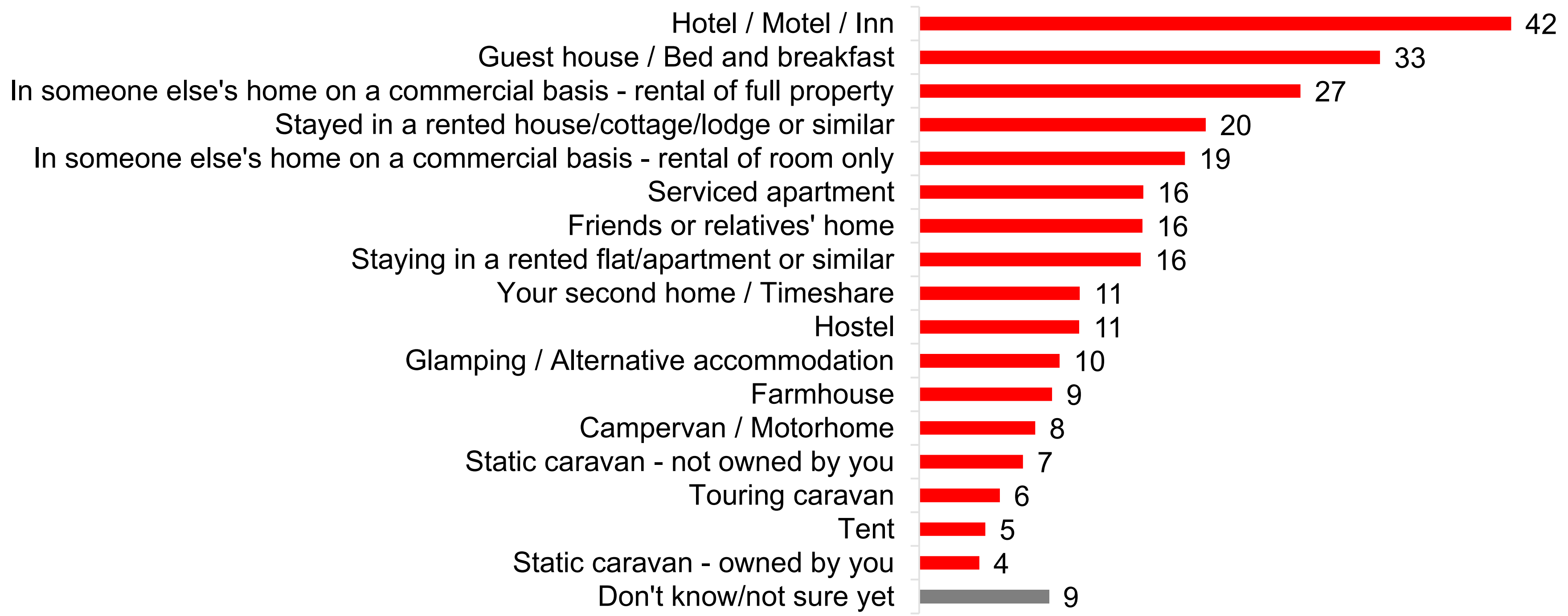


F8. Which of the following best describes the main types of destination you are likely to stay in during your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=747

Accommodation planning to stay in during next Wales trip

- ‘Hotels or motels’ are the most popular type of accommodation amongst future Wales trip takers (42% planning on staying in this category) followed by ‘guest house/B&B’ (at 33%). A range of other accommodation types were also chosen, including ‘rental of full property in someone else’s home’ (27%), ‘rented house/cottage/lodge’ (20%) and ‘rental of room only in someone else’s home’ (19%).
- Caravans (either static or touring) and tents are the least popular type of accommodation amongst future Wales trip takers.

Figure 61. Accommodation planning to stay in during next Wales trip, Percentage. All Wales trip intenders



F9. What type/s of accommodation would you be most likely to stay in on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=747

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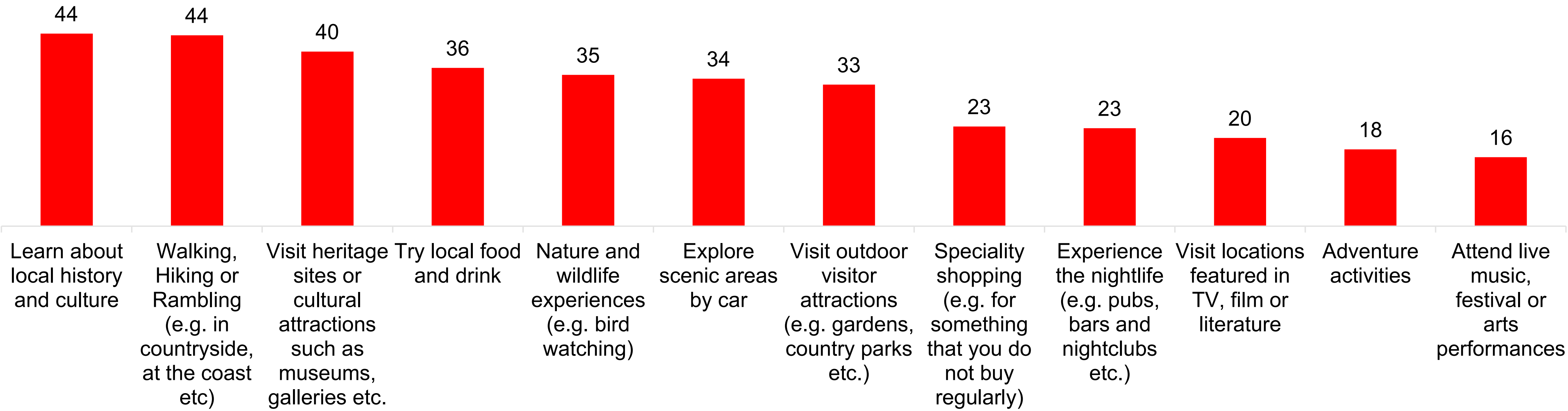
Activities likely on NEXT Wales trip

- Aligned with general destination preference, ‘learning about local history and culture’ and ‘walking, hiking or rambling’ are the leading activities likely to be undertaken by Wales trip intenders, driven by older independents and retirees. ‘Visiting heritage sites or cultural attractions’, ‘trying local food and drink’, ‘nature and wildlife experiences’, ‘exploring scenic areas by car’ and ‘visiting outdoor visitor attractions’ are also popular activities.
- ‘Adventure activities’, although ranking low overall, index higher amongst pre-nesters and families.

Figure 62. Top 12 activities of those intending to take a trip in Wales, Percentage, All Wales trip Intenders



F10. Which, if any, of these activities are you likely to do on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=747

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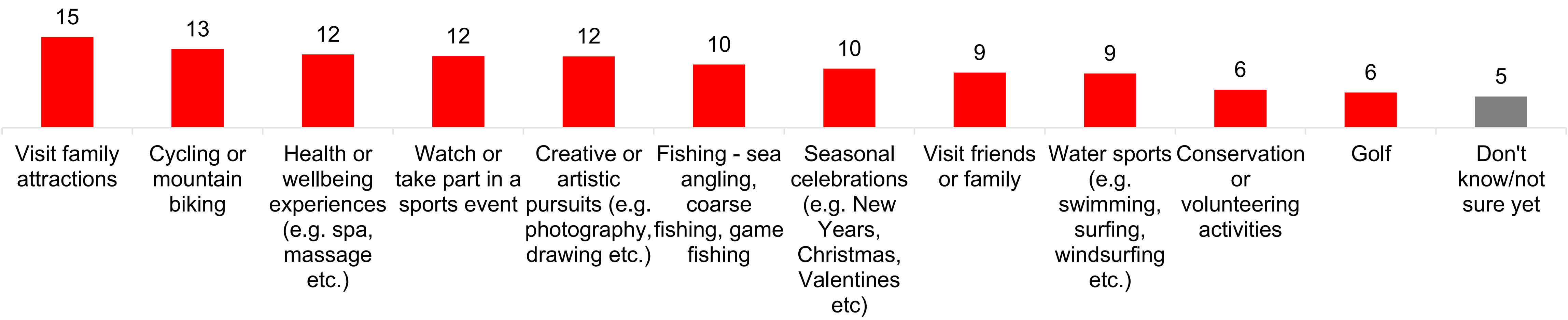
Activities likely on NEXT Wales trip

- A number of other activities appeal to the French holiday market, albeit at a more niche level. Examples include 'visiting family attractions', and 'cycling or mountain biking'. 'Golf' and 'conservation and volunteering' are the least likely activities for future overnight trips to Wales. Preferred activities vary by life stage – families and pre-nesters are more likely to favour water sports and cycling or mountain biking than the other life stages.

Figure 63. Bottom 11 activities of those intending to take a trip in Wales, Percentage, All Wales trip Intenders



F10. Which, if any, of these activities are you likely to do on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=747

Interest in attending festivals or events in Wales

- There is strong general interest in festivals/events in Wales amongst intenders from the French market. Intenders are most likely to report that they would be very interested in attending a 'local produce/arts/craft event' and 'food and drink festival' (both at 33%). There is also interest in 'culture/literary arts festivals' and 'live music'.

Figure 64. Interest in festivals/events of those intending to take a trip in Wales, Percentage, All Wales trip Intenders

F11. How, if any, of the below types of festivals or events would you be very interested in attending whilst on your next overnight trip to Wales? All data weighted.
Base: All Wales trip intenders n=747

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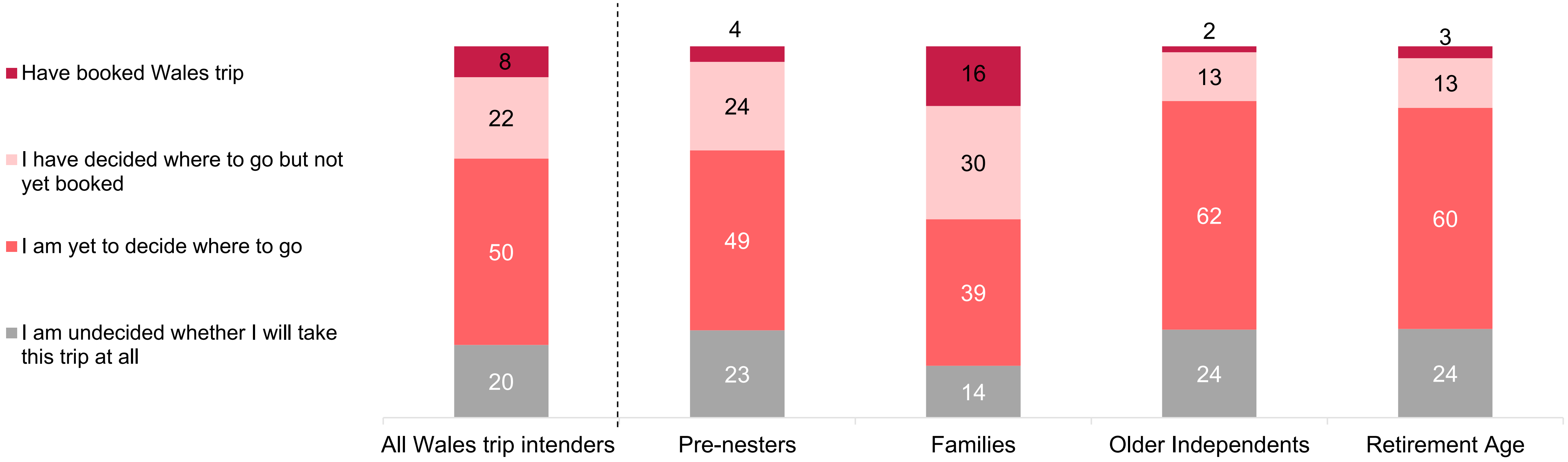
Future planning and booking to Wales

Booking status of next Wales trip

- Over 1 in 5 (22%) of the French holiday market that are likely to take an overnight trip to Wales in the next few years have ‘decided where to go but not booked yet’, with half ‘yet to decide where to go’.
- Families are most likely to have made the decision on where they will go already. Older independents and retirees are the least likely to have decided where to go.

Figure 65. Booking status of next Wales trip, Percentage, All Wales trip intenders



F15. Which of the following best describe how close you are to booking your next overnight trip to Wales? All data weighted.
Base: All Wales trip intenders n=747. Pre-nesters n=90; Families n=314; Older Independents n=247; Retirees n=96

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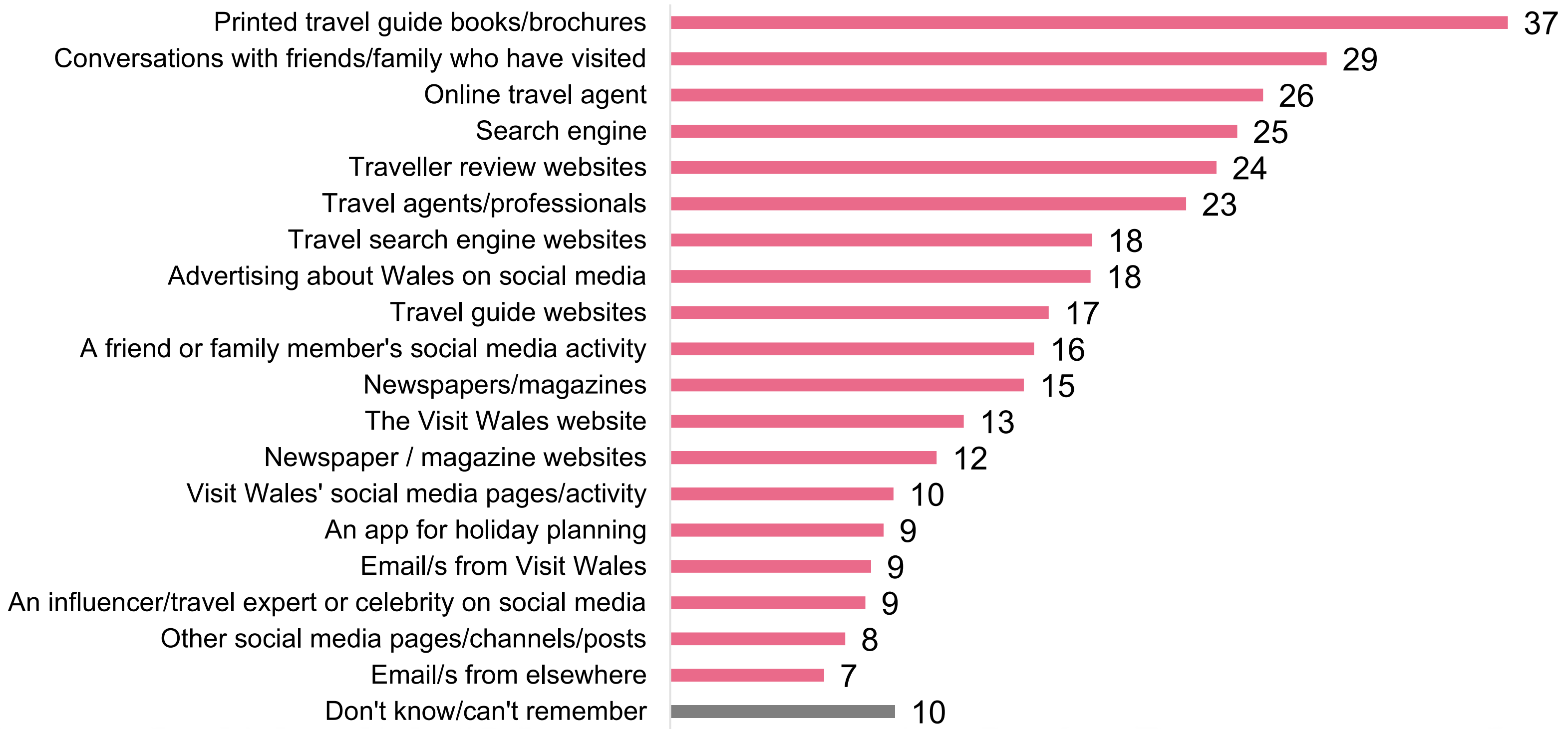
Sources of information to use when taking a trip in Wales

- Trip takers to Wales are likely to use a range of sources to plan their next trip/s – 'printed travel guide books/brochures' and 'conversations with friends' the main influences.
- 'Printed travel guide books/brochures' is a popular information source across all life stages. 'Conversations with friends/family who have visited' is more popular among retirees. 'Online travel agent' and 'a friend or family member's social media activity' are more popular among pre-nesters.

Figure 66. Sources of information used/likely to use of those intending to take a trip in Wales, Percentage, All Wales trip Intenders



F16. Which, if any, of these information sources are you likely to or have you already used to plan your next trip/s to Wales? All data weighted.
Base: All Wales trip intenders n=747

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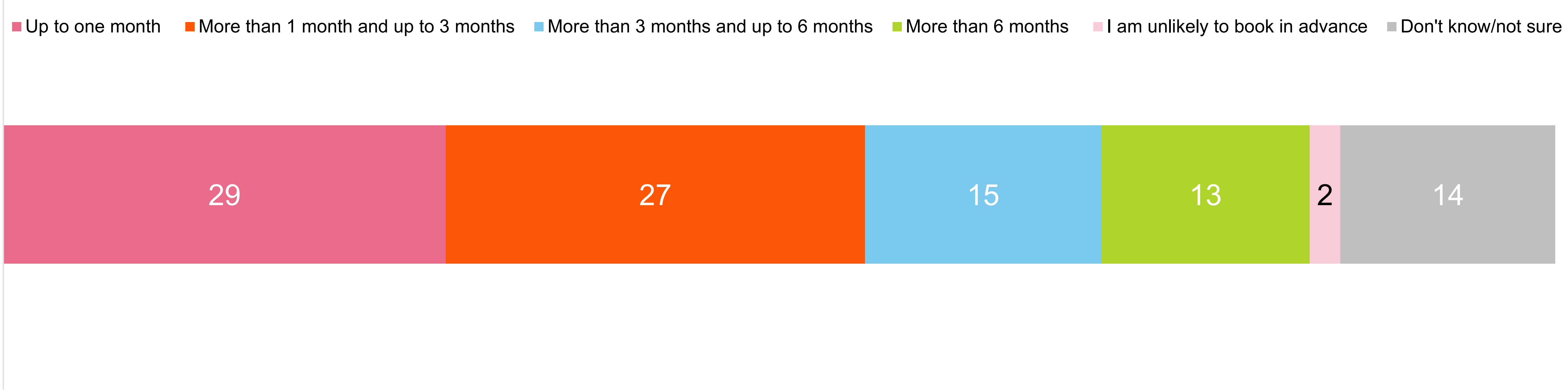
Time period between booking next Wales trip and the first day of trip

- 29% of trip intenders anticipate booking their next Wales trip within 1 month of the travel date, with a further 1 in 4 (27%) expecting to do so 1 to 3 months before the travel date. Only 3 in 10 (29%) would expect to book the trip more than 3 months in advance of the trip.

Figure 67. Time period between booking next Wales trip and the first day of trip, Percentage, All Wales trip Intenders



F17. Roughly how much time is there likely to be between you booking your next Wales trip and the first day of your trip?
All data weighted.
Base: All Wales trip intenders n=747

Wales trip booking behaviour

- 7 in 10 (71%) of Wales trip intenders from France will book at least some of the elements of their trip separately – driven largely by families. Only 15% will book most or all elements as one package and this is most likely to be retirees.
- Trips to Wales are most likely to be booked via a ‘price comparison site’ (24%), followed by a ‘specialist travel company’ (14%).

Figure 68. Ways to book the main elements of next Wales trip, Percentage, All Wales trip intenders

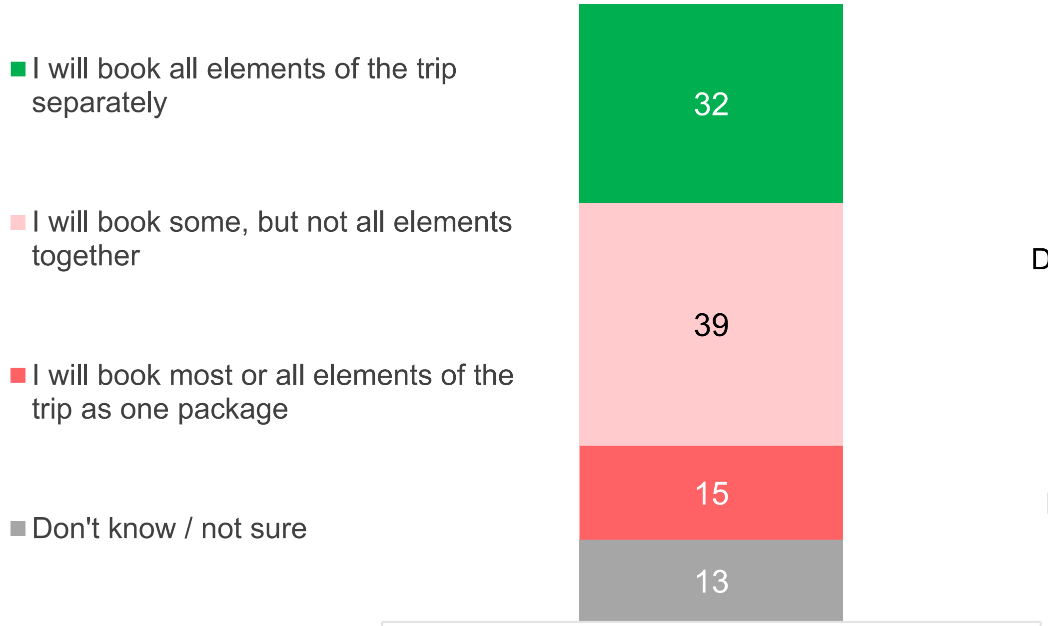
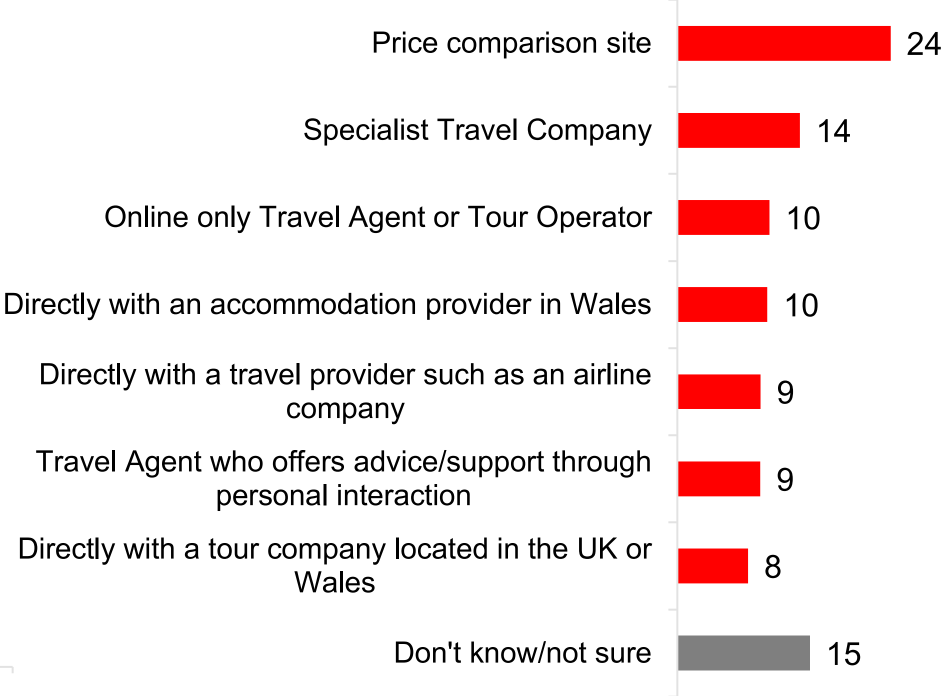


Figure 69. Booking channel for next Wales trip, Percentage. All Wales trip intenders



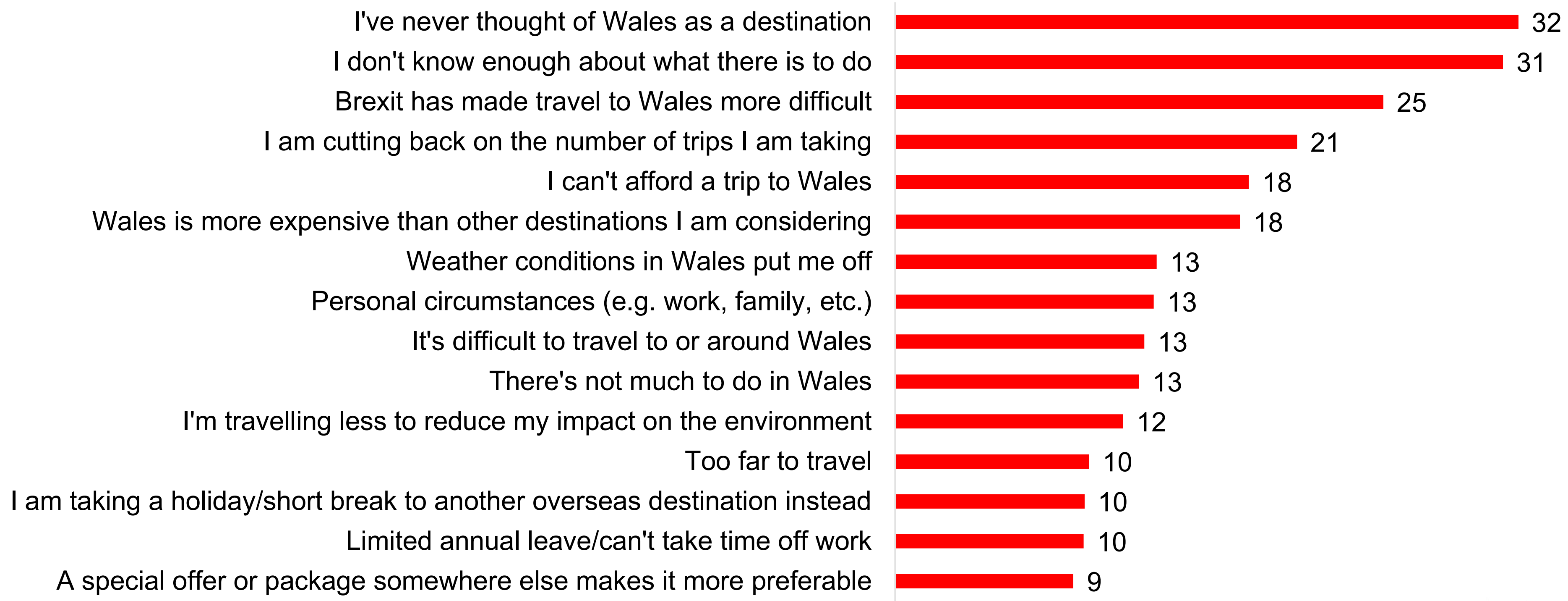
F17b. How are you most likely to book the main elements of your next Wales trip including travel and accommodation?
F18. And with whom are you most likely to book your trip? All data weighted.
Base: All Wales trip intenders n=747

Non-intenders to Wales

Reason for not visiting Wales in the next few years

- Lack of awareness and knowledge are the leading drivers for not visiting Wales in the next few years - 32% stating ‘I never thought of Wales as a destination’ and 31% stating ‘I don’t know enough about what there is to do’.
- A range of other reasons were also mentioned, including ‘Brexit has made travel to Wales more difficult’ (25%) and ‘I am cutting back on the number of trips I am taking’ (21%). It’s notable that Brexit is a leading reason for not visiting at both a Wales and UK level, underlining how salient it is as an issue.

Figure 70. Top 15 reasons for not visiting Wales for a holiday or short break in next few years, Percentage, All non-intenders to Wales



F19. What are the reasons that you are not planning to visit Wales for a holiday or short break in the next few years? All data weighted.
Base: All Wales non-intenders n=260

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Other destination considerations amongst non-intenders to Wales

- Of the people who stated they are not intending to visit Wales in the next few years, 68% are seriously considering a holiday or short break to London. There are also sizeable levels of intent to visit Ireland and Scotland.
- 14% of those not intending to visit Wales in the next few years state that they are ‘very/fairly’ likely to take a day trip to Wales when on a vacation elsewhere in the UK in the next few years.

Figure 71. Other destination visiting intentions by non-intenders to Wales, Percentage, All non-intenders to Wales

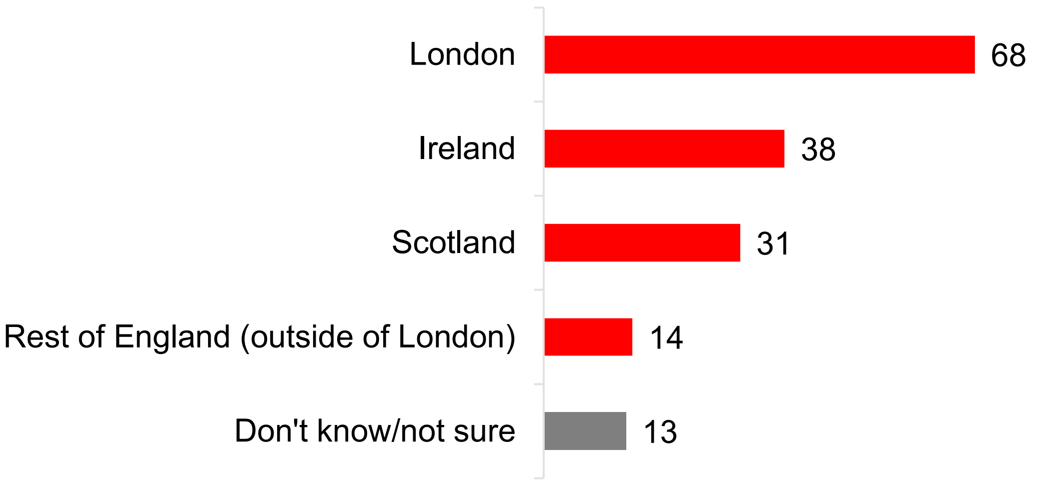
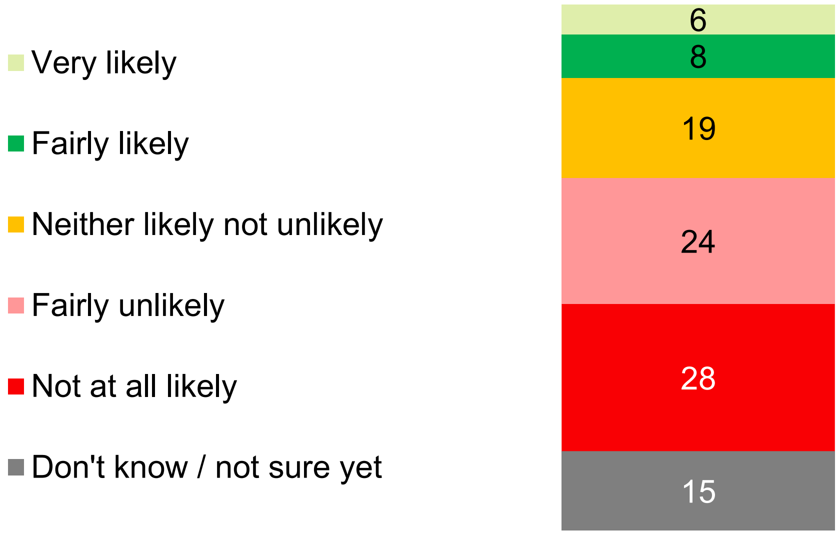


Figure 72. Wales day trip visiting intentions by non-intenders to Wales, Percentage, All non-intenders to Wales



F20. Where, if anywhere, in the UK and Ireland are you seriously considering visiting for a holiday/short break in the next few years? F21. How likely are you to visit Wales for a day trip when on a holiday/short break elsewhere in the UK in the next few years? All data weighted. Base: All Wales non-intenders n=260

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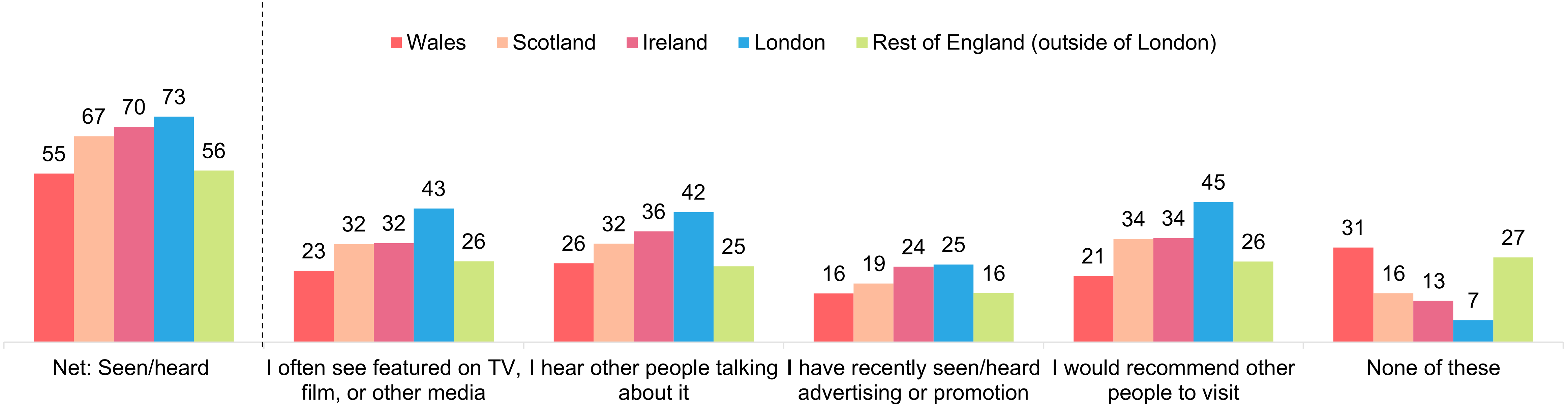
Marketing impact

Ways in which seen/heard about Wales and other destinations

- The French market is less likely to have heard about Wales via the media or other people than other UK and Ireland destinations, although for some sources of information, the proportion of those who have heard about Wales is similar to those that have heard about the Rest of England. This is accompanied by a lower proportion of French market who would recommend Wales as a place to visit.
- Over half (55%) of the French holiday market report seeing or hearing Wales featured in the media, being talked about by others or to have recently seen/heard advertising or promotion about it. Wales is most likely to have been talked about by others. Those who are 'very interested' in visiting Wales are more likely to have seen or heard about Wales.
- Overall, the other destinations have been seen or heard (net) about by more of the French holiday market than Wales.

Figure 73. Ways in which seen or heard about Wales and other destinations, Percentage, All respondents

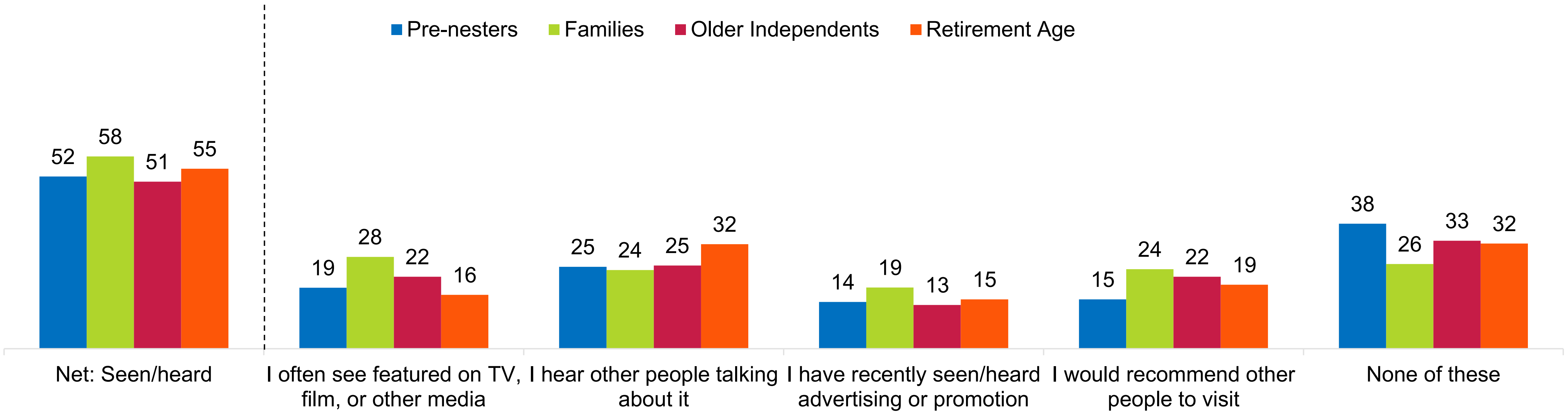


C2. Which, if any, of these statements apply to you and these destinations? All data weighted.
Base: All respondents n=1,007

Ways in which seen/heard about Wales and other destinations

- Families are most likely to have seen/heard about Wales, 58% saying they have done so in some way. ‘TV, film or other media’ is the most likely source, followed by ‘other people talking about it’.
- Retirees are more likely to report having heard other people talking about Wales than other life stages. Pre-nesters are most likely to report not having seen or heard of Wales through any of these sources.

Figure 74. Ways in which seen or heard about Wales by life stage, Percentage, All respondents



C2. Which, if any, of these statements apply to you and these destinations? All data weighted.
Base: All respondents. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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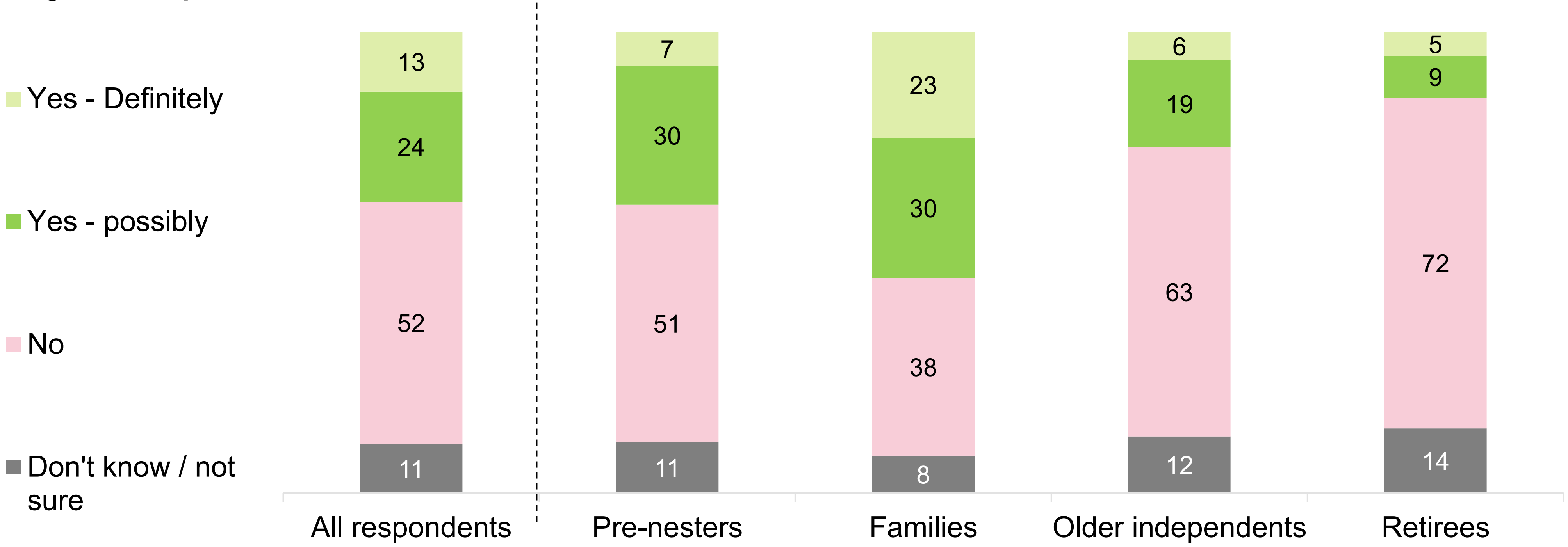
Recall or seen or heard about Wales promotions or marketing

- Just over a third (37%) of the French holiday market 'definitely' or 'possibly' recall seeing promotions or marketing about Wales in the last year or so, rising to 53% of those from a family life stage.
- Over half (52%) do not recall seeing anything, highest amongst older life stages.

Figure 75. Whether recall seeing promotions or marketing about Wales in the last year or so, Percentage, All respondents

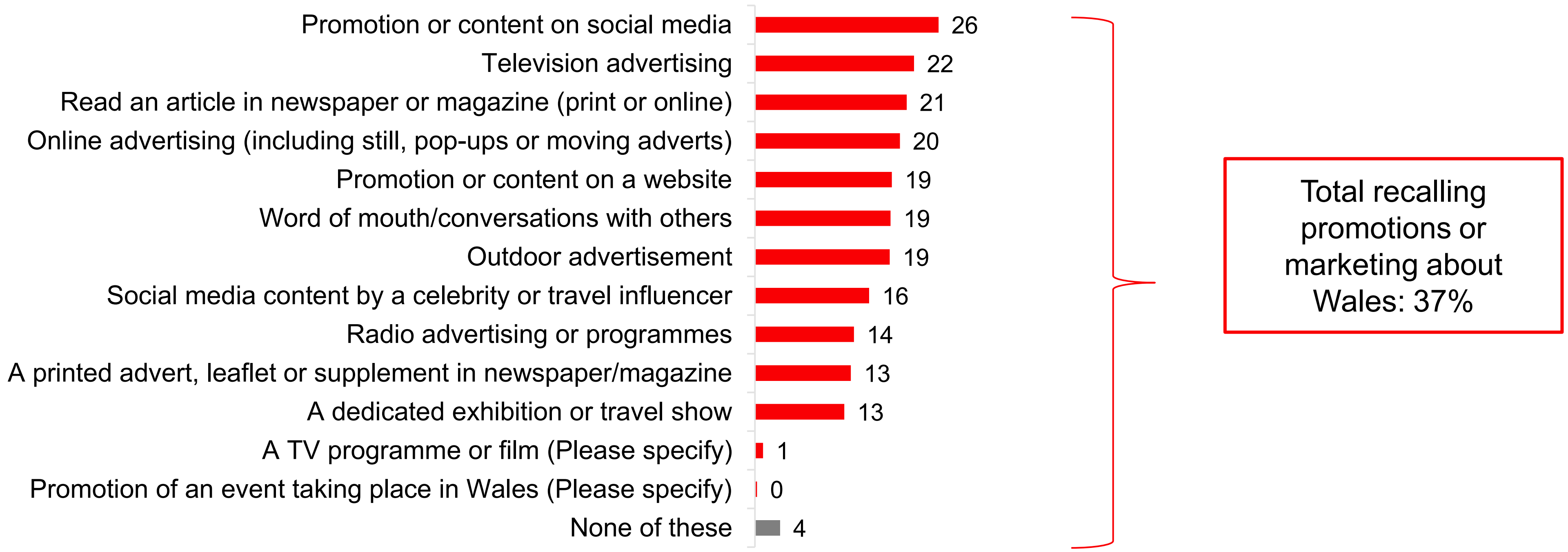


H1. Do you recall seeing any promotions or marketing about Wales in the last year or so? All data weighted.
Base: All respondents n=1,007. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

Ways in which seen or heard about Wales

- Of the French holiday market who have ‘definitely’ or ‘possibly’ seen promotions or marketing on Wales in the last year or so, they are most likely to recall seeing ‘promotion or content on social media’ (26%), ‘television advertising’ (22%) and to have ‘read an article in newspaper or magazine’ (21%).

Figure 76. Engagement with Wales marketing and communications, Percentage, All respondents seen or heard about Wales promotions or marketing

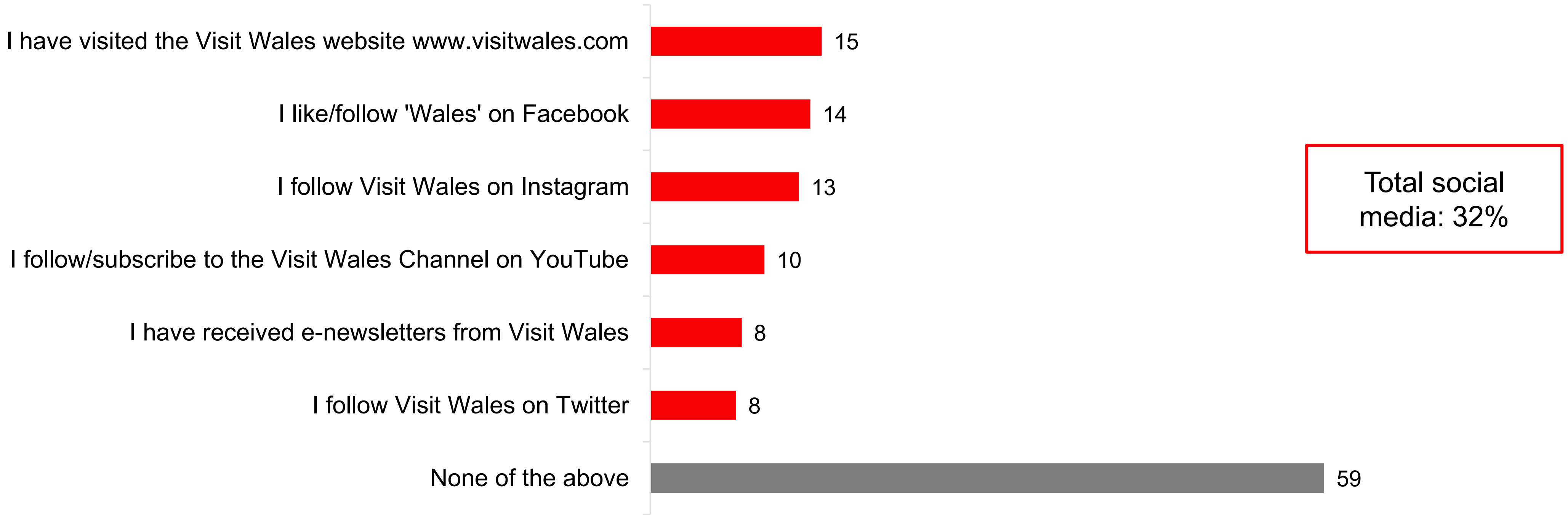


H2. From which, if any, of the following have you seen or heard about holidays or short breaks in Wales in the last year or so? All data weighted. Base: All respondents that have seen or heard about Wales promotions or marketing n=368.

Contact with Visit Wales in last 12 months

- The majority of the French holiday market haven't had any contact with Visit Wales in the last 12 months (59%).
- Of the different contact types, 15% of the French holiday market have visited the Visit Wales website. Just under a third have engaged with Visit Wales on social media.

Figure 77. Contact with Visit Wales in the last 12 months, Percentage, All respondents

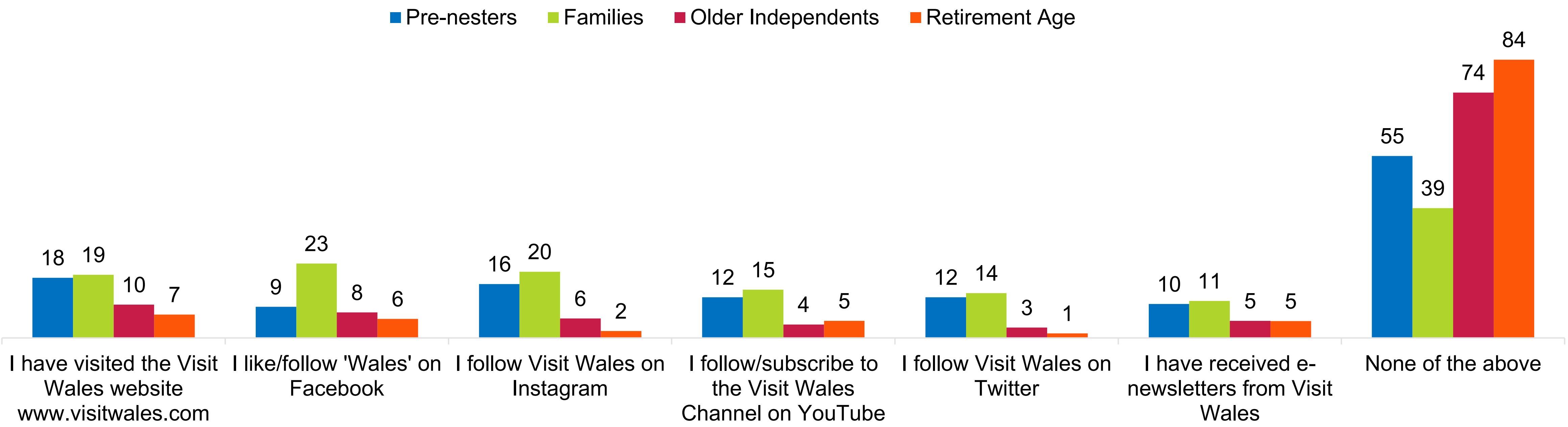


H4. Thinking about all contact you had with Visit Wales in the last 12 months, which of the following apply to you? All data weighted. All respondents n=1,007

Contact with Visit Wales in last 12 months

- Just under a quarter (23%) of families in the French holiday market like/follow ‘Wales’ on Facebook and 1 in 5 of the same life stage follow Visit Wales on Instagram
- Pre-nesters and families are more likely to report having visited the Visit Wales website, with just under 1 in 5 stating this.
- Older independents and retirees are more likely to not have had any contact with Visit Wales via the methods presented.

Figure 78. Contact with Visit Wales in the last 12 months by life stage, Percentage, All respondents



H4. Thinking about all contact you had with Visit Wales in the last 12 months, which of the following apply to you? All data weighted. Base: All respondents n=1,007. Pre-nesters n=141; Families n=398; Older Independents n=333; Retirees n=135

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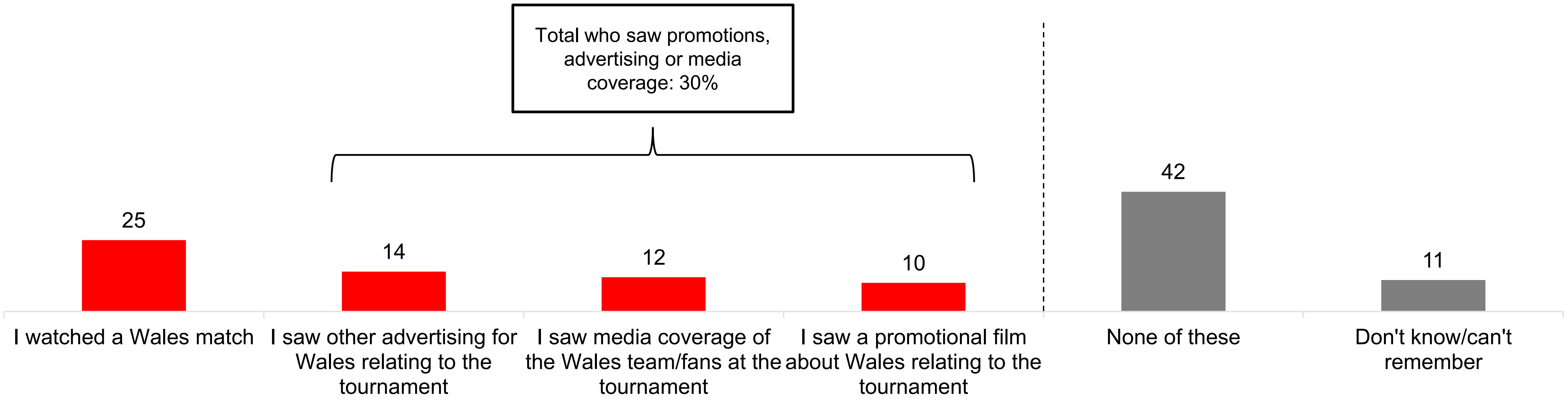
Promotion and Awareness of Wales from Mens' Football World Cup (November 2022)

How much seen about Wales during the World Cup

- Exactly a quarter of the French market stated they watched a Wales football match during the Football World Cup which took place in November-December 2022 (this could have been in person or on TV). A further 30% saw some form of media coverage about Wales.

Figure 79. Wales promotions or coverage in the Men's Football World Cup, Percentage, All respondents

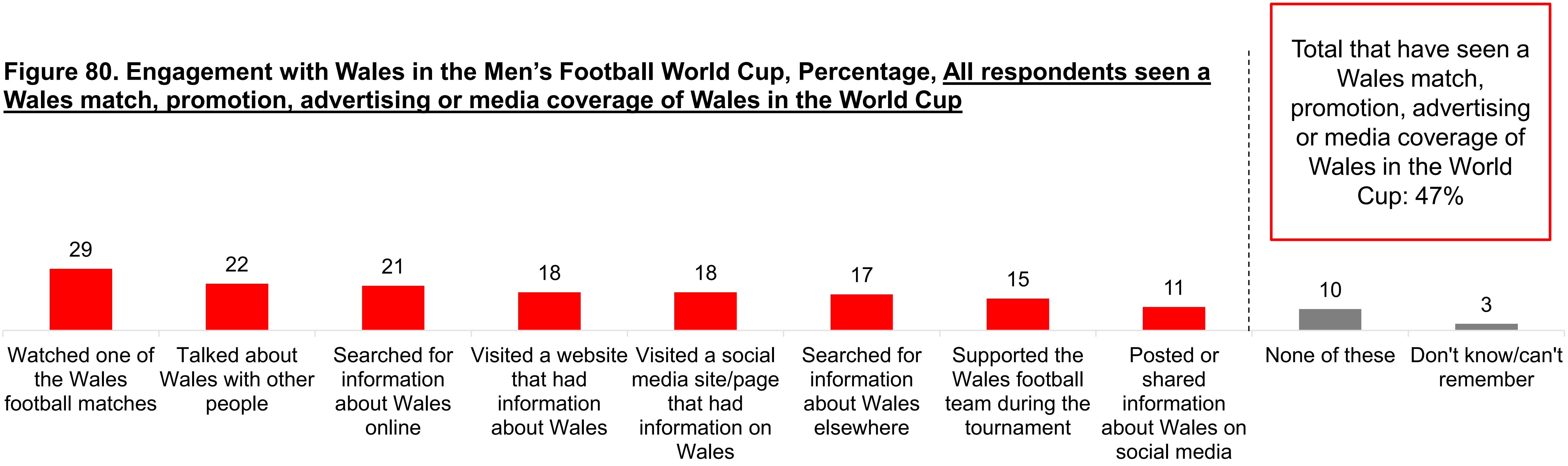


I1. Which, if any, of the following did you see or do in relation to Wales in the Men's Football World Cup? All data weighted.
Base: All respondents n=1,007

Engagement with Wales as a result of promotions

- Those that had seen a Wales match, promotion, advertising or media coverage of Wales in the World cup were asked if they did anything as a result of seeing the promotions or coverage. In total, 87% of respondents engaged with Wales at some level as a result of watching football coverage or seeing promotions of Wales during the World Cup. 29% watched one of the Wales football matches, 22% talked about Wales with other people and 21% searched for information about Wales online.

Figure 80. Engagement with Wales in the Men's Football World Cup, Percentage, All respondents seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup



I2. Which, if any, of the following did do as a result of seeing the promotions or coverage of Wales during the World Cup? All data weighted.
Base: All respondents that have seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup n=462

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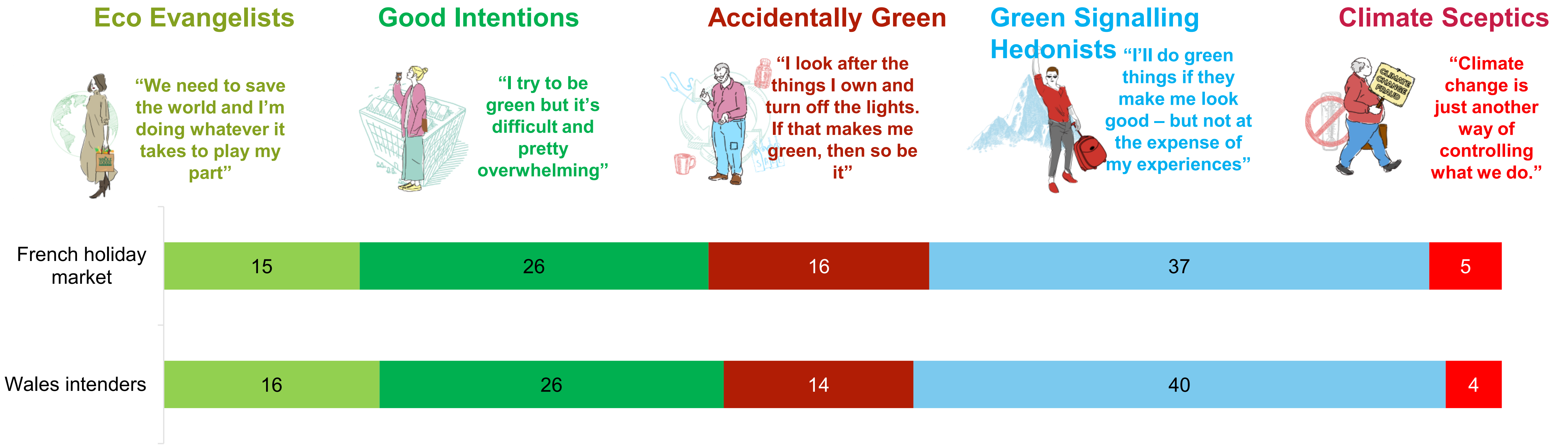
Understanding Attitudes to Sustainability

Breakdown of BVA BDRC sustainability segments

- The largest sustainability segment amongst the French holiday market is ‘Green Signalling Hedonists’ (marginally higher amongst Wales intenders) - a segment that has a ‘superficial interest’ in environmental issues, but not at the expense of their experiences. A notable 2 in 5 are either ‘Eco Evangelists’ or ‘Good Intentions’ – two segments who are passionate about the environment, underlining the importance of tourism organisations communicating their sustainability credentials.

Figure 81. Breakdown of Wales intenders by BVA BDRC sustainability segments

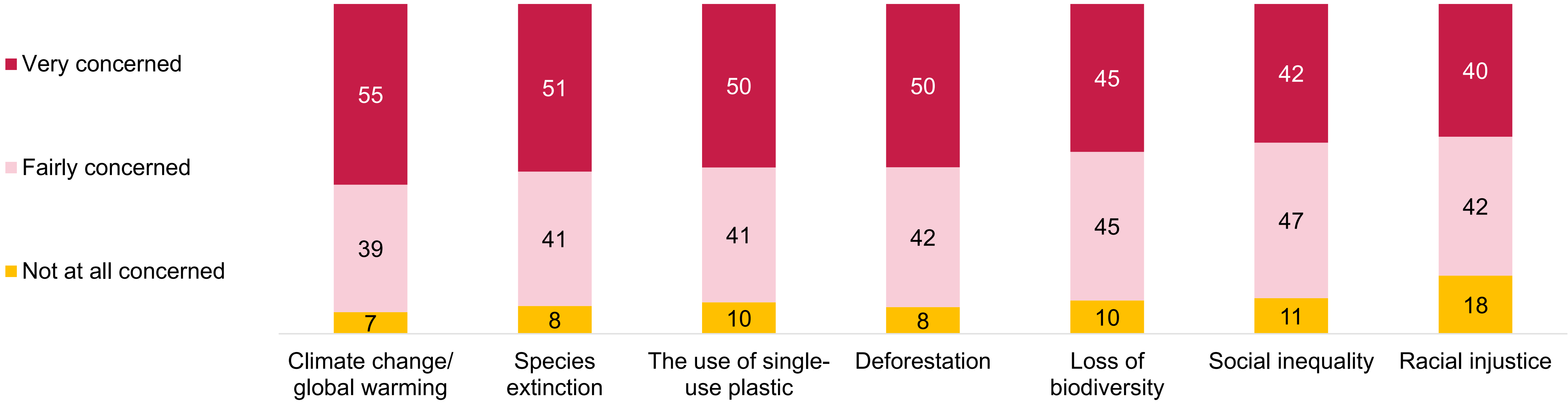


BVA BDRC sustainability segment questions
Base: All respondents n=1,007

Top sustainability issues for the French market

- Climate change, species extinction, the use of single-use plastic and deforestation are the biggest concerns of the French holiday market in relation to sustainability. 'Social issues' are less of a concern. There is limited variation by life stage.

Figure 82. Sustainability concerns tourism businesses should prioritise, Percentage, All respondents

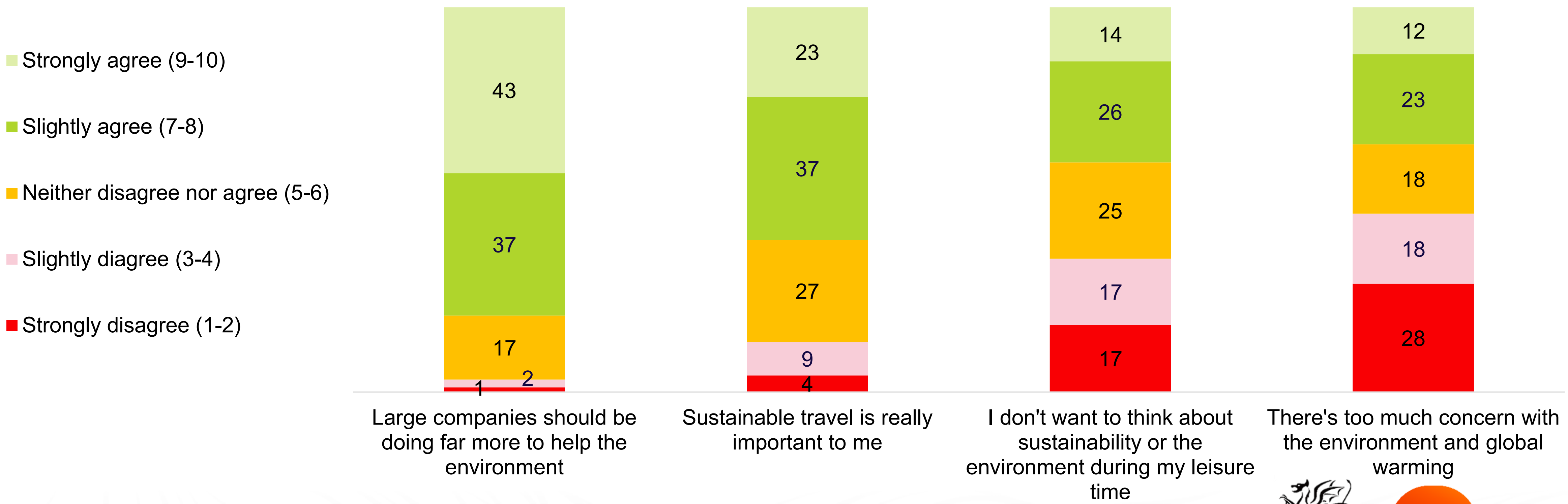


K2a. How, if at all, concerned are you about the following? All data weighted.
Base: All respondents n=1,007

Attitudes to climate change and the environment

- ‘Large companies should be doing more to help the environment’ is the most agreed with sustainability statement from the French holiday market, with 4 in 5 of people ‘strongly’ or ‘slightly’ agreeing with this. Only a minority agree that ‘there’s too much concern with the environment and global warming’ or that they ‘don’t want to think about sustainability or the environment during their leisure time’.
- Wales trip intenders are more likely to ‘strongly agree’ with the statement ‘sustainable travel is really important to me’ than any of the other statements.

Figure 83. Attitude to climate change and the environment, Percentage, All respondents



K1. Below are some statements other people have made about climate change and the environment. How much do you agree or disagree with each? (scale of 1-10) All data weighted.
Base: All respondents n=1,007

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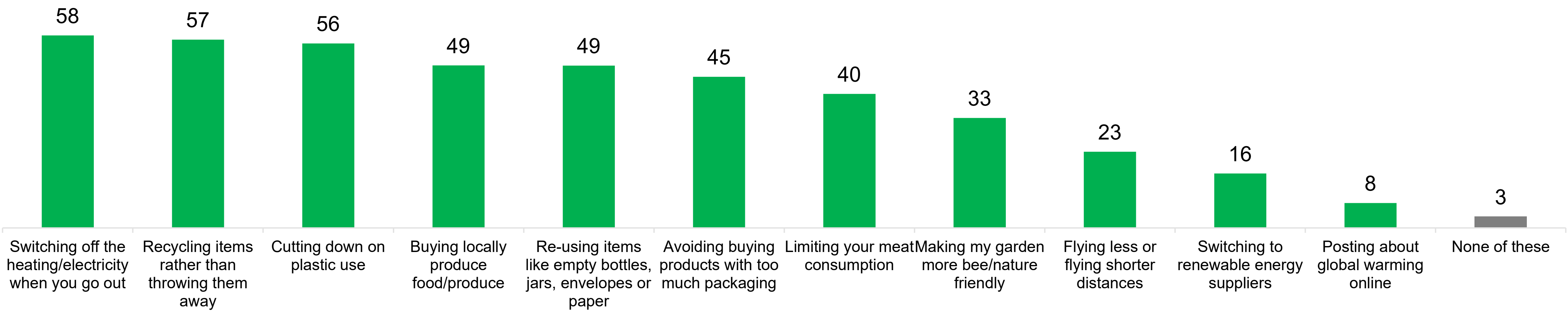
Individual sustainable actions

- The French holiday market are actively trying to help the environment in a range of different ways, particularly by switching off heating/electricity, recycling materials and cutting down on plastic use.
- Notably, nearly 1 in 4 are flying less or flying shorter distances.

Figure 84. Individual sustainable actions, Percentage, All respondents



K3b. Which of the following are you currently doing to help the environment? All data weighted.
Base: All respondents n=1,007

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Appendix 1

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.

	Survey finding of…		
Base	**5 / 95%**	**20 / 80%**	**50 / 50%**
Total Sample (1,007)	+/-1.3%	+/- 2.5%	+/- 3.1%
Pre-nesters (141)	+/- 3.6%	+/- 6.6%	+/- 8.3%
Families (398)	+/- 2.1%	+/- 3.9%	+/- 4.9%
Older Independents (333)	+/- 2.3%	+/- 4.3%	+/- 5.4%
Retirees (135)	+/- 3.7%	+/- 6.7%	+/- 8.4%
Wales trip intenders (747)	+/- 1.6%	+/- 2.9%	+/- 3.6%

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Appendix 2

Destination types associated with selected UK destinations

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

Cities and large towns	Historic and heritage towns	Scenic countryside and villages	Scenic coastline and harbours	A touring holiday	Mountain adventure	Traditional seaside resorts	Wilderness and nature	Holiday village/centre (e.g. Center Parcs or equivalent	Large resort hotel
71% London	56% London	47% Rest of England	34%	33%	48%	23% Rest of England	43%	13% Rest of England	18% London
42% Rest of England	51% Rest of England	46%	34% Rest of England	33% Rest of England	43%	15%	41%	9%	13% Rest of England
32%	51%	44%	28%	30%	30%	13%	32%	8% London	9%
31%	49%	42%	25%	24%	27% Rest of England	12%	31% Rest of England	8%	8%
27%	47%	13% London	9% London	11% London	7% London	7% London	7% London	8%	7%

D1. Which, if any, of these places do you most associate with these destination types? All data weighted.
Base: All respondents considering each destination type n=1,007

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Destination associations – trip influences

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

A destination rich in history and heritage	Great value for money	An authentic cultural experience	Incredible scenery and landscapes	Is easy to travel to and get around	Great places to explore off the beaten track	Somewhere you can visit at all times of the year	High quality accommodation	Famous landmarks and visitor attractions
London 40%	20%	34%	45%	London 35%	39%	London 41%	London 27%	London 36%
36%	Rest of England 15%	London 32%	43%	18%	38%	26%	26%	23%
35%	15%	32%	30%	Rest of England 17%	30%	25%	22%	22%
Rest of England 29%	15%	25%	Rest of England 27%	14%	Rest of England 28%	Rest of England 24%	Rest of England 20%	Rest of England 20%
27%	London 14%	Rest of England 24%	London 14%	13%	London 14%	22%	20%	17%

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,007

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Destination associations – trip influences

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

People that are very welcoming	Accommodation with charm and character	Lots of activities and things to do	Quiet places without crowds of people	Opportunities to meet and socialise with other people	Places renowned for their food and drink	A thriving culture and entertainment scene	An environmentally friendly destination	Opportunities to explore my hobbies and interests
32%	30%	London 39%	35%	28%	London 25%	London 32%	27%	London 19%
27%	29%	22%	33%	London 26%	22%	20%	27%	Rest of England 15%
22%	24%	Rest of England 20%	29%	25%	18%	17%	19%	14%
London 22%	Rest of England 23%	20%	Rest of England 26%	Rest of England 24%	17%	Rest of England 15%	Rest of England 17%	13%
Rest of England 21%	London 17%	15%	London 10%	22%	Rest of England 16%	13%	London 12%	12%

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,007

Destination associations – trip experiences

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

Visiting heritage sites or cultural attractions	Learning about local history and culture	Walking, Hiking or Rambling	Trying local food and drink	Visiting outdoor visitor attractions	Speciality shopping	Nature and wildlife experiences	Exploring scenic areas by car	Experience the nightlife	Visiting locations featured in TV, film or literature	Attending live music, festival or arts performances	Visiting family attractions
44% London	38%	41%	27%	28% London	39% London	37%	34%	37% London	26% London	29% London	20% London
30%	38%	39%	27%	25%	14% Rest of England	35%	32%	21%	18%	15%	13% Rest of England
29%	33% London	32%	26% London	24%	13%	27%	28% Rest of England	15% Rest of England	16%	13% Rest of England	11%
27% Rest of England	33%	30% Rest of England	22%	23% Rest of England	12%	26% Rest of England	26%	14%	15%	11%	10%
25%	31% Rest of England	13% London	21% Rest of England	21%	11%	8% London	13% London	13%	14% Rest of England	10%	9%

D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,007

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Destination associations – trip experiences

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

Seasonal celebrations	Adventure activities	Visit friends or family	Creative or artistic pursuits	Watching or taking part in a sports event	Health or wellbeing experiences	Cycling or mountain biking	Water sports	Fishing - sea angling, coarse fishing, game fishing	Golf	Conservation or volunteering activities
🏴󠁧󠁢󠁥󠁮󠁧󠁿 27% London	🇮🇪 22%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 13% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 15% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 21% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 14% London	🇮🇪 19%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 13% Rest of England	🇮🇪 21%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 10%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 10% London
🇮🇪 16%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 20%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 11% Rest of England	🇮🇪 14%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 12%	🇮🇪 12%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 18%	🇮🇪 13%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 20%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 9% Rest of England	🇮🇪 9%
🏴󠁧󠁢󠁷󠁬󠁳󠁿 13%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 17% Rest of England	🇮🇪 9%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 14% Rest of England	🏴󠁧󠁢󠁳󠁣󠁴󠁿 12%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 11% Rest of England	🏴󠁧󠁢󠁷󠁬󠁳󠁿 15%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 11%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 15% Rest of England	🇮🇪 9%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 9% Rest of England
🏴󠁧󠁢󠁳󠁣󠁴󠁿 13%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 15%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 8%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 14%	🇮🇪 11%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 11%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 14% Rest of England	🏴󠁧󠁢󠁷󠁬󠁳󠁿 9%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 13%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 9%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 8%
🏴󠁧󠁢󠁥󠁮󠁧󠁿 12% Rest of England	🏴󠁧󠁢󠁥󠁮󠁧󠁿 8% London	🏴󠁧󠁢󠁷󠁬󠁳󠁿 7%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 14%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 10% Rest of England	🏴󠁧󠁢󠁳󠁣󠁴󠁿 10%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 6% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 6% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 5% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 7% London	🏴󠁧󠁢󠁳󠁣󠁴󠁿 8%

D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,007

Appendix 3

Life stage summary

Table 6. Summary of key findings by life stage

	All	Pre-nesters	Families	Older Independents	Retirees
Size of adult population	52.6m	5.8m	16.8m	16.3m	13.2m
% of population very/ fairly likely to visit UK in next few years	49%	53%	73%	42%	26%
% of market very/fairly familiar with Wales	31%	23%	42%	27%	24%
% of market visited Wales in the past	26%	24%	37%	15%	20%
% of market 'very interested' in visiting Wales in next few years	32%	21%	43%	27%	24%
Top 3 preferred UK destination types (weaker Wales perceptions in red)	1.Cities and large towns 2.Historic/Heritage Towns 3.Scenic countryside	1.Cities and large towns 2.Historic/Heritage Towns 3.Scenic countryside	1.Cities and large towns 2.Historic/Heritage Towns 3.Scenic coastline	1.Historic/Heritage Towns 2.Cities and large towns 3.Scenic countryside	1.Historic/Heritage Towns 2.Cities and large towns 3.Scenic coastline
Top 3 UK influences (weaker Wales perceptions in red)	1.Rich in history 2.Value for money 3.Authentic culture	1.Value for money 2.Authentic culture 3.Incredible scenery	1.Value for money 2.Authentic culture 3.Easy to travel to/around	1.Rich in history 2.Incredible scenery 3.Value for money	1.Rich in history 2.Places to explore 3.Authentic culture
Top 3 UK experiences (weaker Wales perceptions in red)	1.Heritage sites 2.Local history and culture 3.Walking or hiking	1.Heritage sites 2.Outdoor attractions 3.Walking or hiking	1.Heritage sites 2.Local history and culture 3.Outdoor attractions	1.Heritage sites 2.Local history and culture 3.Walking or hiking	1.Local history and culture 2.Heritage sites 3.Walking or hiking

Segment summary

Table 7. Summary of key findings by segment

	Adventurers	Experience Seekers	Explorers	Sightseers	Cultural Buffs
Size of adult population	8.4	11.6	15.3	5.3	12.6
% of population very/ fairly likely to visit UK in next few years	63%	60%	32%	55%	49%
% of market very/fairly familiar with Wales	32%	36%	25%	25%	38%
% of market visited Wales in the past	20%	33%	16%	25%	32%
% of market 'very interested' in visiting Wales in next few years	34%	40%	23%	19%	36%
Top 3 preferred UK destination types (weaker Wales perceptions in red)	1.Historic/Heritage towns 2.Cities and large towns 3.Scenic countryside	1.Cities and large towns 2.Historic/Heritage towns 3.Scenic coastline	1.Historic/Heritage towns 2.Cities and large towns 3.Scenic countryside	1.Cities and large towns 2.Historic/Heritage towns 3.Scenic coastline	1.Cities and large towns 2.Historic/Heritage towns 3.Scenic coastline
Top 3 UK influences (weaker Wales perceptions in red)	1.Rich in history 2.Places to explore 3.Incredible scenery	1.Incredible scenery 2.Lots of activities 3.Authentic culture	1.Value for money 2.Rich in history 3.Incredible scenery	1.Rich in history 2.Authentic culture 3.Is easy to travel to/around	1.Value for money 2.Authentic culture 3.Can visit all year
Top 3 UK experiences (weaker Wales perceptions in red)	1.Heritage sites 2.Local history 3.Walking or hiking	1.Heritage sites 2.Local history 3.Outdoor attractions	1.Heritage sites 2.Local history 3.Walking or hiking	1.Local history 2.Heritage sites 3.Speciality shopping	1.Local food and drink 2.Heritage sites 3.Local history