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Visit Wales Tourism Market Demand Report – US 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 vacation destination. As part of this, each year Visit Wales conducts research amongst its priority markets. The research featured within this report covers the US Market and broadly looks at:

- The factors influencing vacation and short break choice
- Types of destination and experiences favoured on vacations and short breaks
- Associations with UK vacation destinations
- Wales as a destination
- Future visits to Wales
- Barriers to taking vacations 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
- Wrexham promotional activity
- Profiling and demographics

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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 **US vacation market (a term used throughout this report)**. We define this as:

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

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

There were 1,000 completed surveys. The first 300 responses to the survey were nationally representative of the USA population by age, gender and region of residence. This allowed researchers to understand the nationally representative breakdown of the US vacation 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 the respondents to this survey are self-selecting and represent a sub-sample of the US vacation market. Having opted to take part in the survey, they have a strong interest in the UK and taking a vacation there. Results are therefore likely to be more favourable to Wales and the UK than a less self-selecting sample would be. Findings should therefore be viewed within this context and not extrapolated to represent the whole US population.

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Definitions used within this report (1)

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

- **The US vacation market:** The total survey sample. Residents of the US who are seriously considering a vacation in the UK in the next few years
- **Wales trip intenders**: Residents of the US who are definitely or probably intending to take a vacation 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 vacations 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)

US vacation Market

1. This research identifies the US vacation market as those who are seriously considering taking a vacation or short break in the UK in the next few years.
2. Families make up nearly half of the current market, with older independents and pre-nesters each making up around a quarter. Retirees are the smallest life stage of the US market at just 7%.
3. Experience Seekers are by far the largest segment of the US vacation market, followed by Adventurers and Cultural Buffs.
4. The distribution of the sample across regions of residence broadly replicates the US population, with the exception of the North East of the country which has considerably higher representation, driven by a high proportion of respondents from New York.
5. Around 2 in 5 claim to have some sort of existing ties to Wales - 'having Welsh ancestry' is the most common, followed by 'I have friends or family living there'. However, when asked to name specific places in Wales that they associated with vacations, most of the US market could not name a specific place, including many of those who reported a connection to Wales. This suggests that reported connections to Wales may be misleading.
6. Nearly half of the US market have been either 'hit hard' by the cost-of-living crisis or are 'being cautious'. There are some differences by life stage - older independents and retirees are the most cautious, while families are the life stage most likely to report being 'better off than before'. However, just over half of the US market report that they are either 'better off than before' or 'not affected and confident I won't be', considerably higher amongst those who report that they are 'very likely' to take a UK trip in 2024.

Trip Influences and Preferences – UK vacations

1. A range of destination types are of interest to the US vacation market, although urban destinations such as 'cities and large towns' and 'historic and heritage towns' are particularly popular, with over half of respondents reporting that they would seriously consider taking a vacation in the UK to these destination types in the next few years. Scenic destinations are also popular – countryside/villages and coastline/harbours are the next most popular destination types. 'Touring vacations' - which are likely to take in a range of destination types – are also within the top 5 most preferred destination types, supported by just over 3 in 10 reporting that they would like to 'explore scenic areas by car' on a vacation in the UK.
2. 'Famous landmarks and visitor attractions' is the most important influence for the US market in choosing vacations in the UK, and 'trying local food and drink' is the most popular experience to do on a vacation to the UK. 'Great value for money is also influential for the US market, cited by 4 in 10.

Key findings (2)

3. Heritage and culture is another important driver of visits to the UK for a vacation - ‘a destination rich in history and heritage’ and ‘an authentic cultural experience’ are both within the top 5 influences for choosing vacations in the UK, and ‘visiting heritage sites or cultural attractions’ and ‘learning about local history and culture’ are both within the top 4 most preferred experiences to do on a vacation to the UK.
4. As implied by the strong interest in scenic destinations, the UK’s outdoor/rural offer is a strong driver of visits from the USA. ‘Incredible scenery and landscapes’ is cited as influential by 36%, whilst ‘walking, hiking or rambling’ and ‘nature and wildlife experiences’ are preferred experiences for around 3 in 10.
5. Other key destination influences for the US market include ‘lots of activities and things to do’, ‘high quality accommodation’, ‘is easy to travel and get around’, ‘people that are very welcoming’, and ‘places renowned for their food and drink’. ‘Trying local food and drink’ and ‘speciality shopping’ are also popular activities for a UK vacation among the US market.
6. Preferred destinations, influences and experiences vary considerably by life stage and VisitBritain segment. Older independents and retirees show a strong interest in history, heritage and scenic destinations, although these are of strong interest across audiences. These older life stages also favour ‘accommodation with charm and character’ – this is less of a priority for pre-nesters and families. For pre-nesters and families, ‘activities’ are of leading importance, and they are more likely to show an interest in adventure activities such as ‘cycling or mountain biking’ or ‘water sports’. They also index higher for ‘health or wellbeing activities’ and ‘creative or artistic pursuits’.

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Key findings (3)

Destination relationships and previous visits

1. Close to half of the US market report that they know Wales 'very' or 'fairly' well, although when asked to name places in Wales that they associated with vacations, fewer than 1 in 10 were able to do so accurately. This suggests that reported familiarity with Wales may reflect familiarity with the UK generally, rather than familiarity with Wales specifically. It should also be noted that familiarity with Wales is lower than any other destination tested within this research, Wales sitting behind 'Rest of England (outside London)', Scotland, Ireland and London. London generates by far the highest familiarity – with just over 7 in 10 stating they know it 'very' or 'fairly' well.
2. Aligned with familiarity, Wales is the destination least likely to have been visited by the US market, although the level of previous visits is very similar to levels for Scotland and Ireland.
3. Families exhibit the strongest levels of familiarity and previous visits to Wales, with older independents and retirees reporting the lowest.

Destination associations and preferences

1. Relative to the destination types the US market would like to visit, Wales is most strongly associated with 'scenic countryside and villages' and 'historic and heritage towns'. Around one third of the US market associates Wales with 'cities and large towns' and 'scenic coastline and harbours'. Given the indications that the US market has limited familiarity with Wales, associations are likely to be driven by perceptions or assumption of what they think Wales would be like rather than knowledge or experience.
2. Wales is also most likely to be seen as somewhere that offers 'a destination rich in history and heritage', 'incredible scenery', 'famous landmarks', and 'an authentic cultural experience'. Wales is also associated with opportunities to visit heritage sites, to learn about local history and culture, to try local food and drink, to visit outdoor visitor attractions, and to engage in walking or hiking.
3. In terms of destination types, influences and experiences, Wales has a very similar pattern of associations to Scotland, Ireland, and the Rest of England (outside London). However, it tends to score lower than each of these destinations for most destination types, influences, and experiences – in some cases, markedly so. For example, Scotland is considerably more likely to be seen as somewhere with 'incredible scenery and landscapes', and Ireland as somewhere offering 'an authentic cultural experience'. Generally, there is no single area where Wales leads in comparison to other destinations. This indicates that, for the US market, perceptions of Wales as a holiday destination lack a clear point of difference to discern Wales from other destinations in the UK and Ireland.
4. Notably, of the small proportion of the US market that demonstrated clear familiarity with Wales, 'history', 'culture', 'scenery' and 'nature' were the most mentioned reasons it would be appealing for a vacation. This suggests that Wales can appeal to the US market as a vacation destination, and has the potential to attract more visitors from this market.

Key findings (4)

Trip Intentions – UK vacations

1. Of the US residents who consider themselves likely to take an overnight trip to the UK, there is an equal split between those 'very' and 'fairly' likely to do so. Just over a third expect to visit this year, but the remainder are planning to visit from 2024 onwards, or are currently unsure.
2. Families are the life stage with the strongest interest in taking a UK trip this year, while Experience Seekers (over half of whom are families) and Sightseers are the segments with the strongest interest in doing so.
3. The US market perceives a broad range of barriers to visiting the UK from the US. The leading barrier is 'personal circumstances', followed by the appeal of 'other places' and 'it's too expensive in the UK generally', cited by just over 1 in 4 each. Combined with 'value for money' being a leading influence for the US market, this further indicates that cost is an important concern for a considerable portion of the US market.
4. Other perceived barriers for the US market include 'safety concerns when in the UK', as does the war in Ukraine, both cited by just over 1 in 5, and just over a third cited both of these barriers together. This suggests that there is an opportunity to highlight the relative safety of Wales as a destination to potential US visitors.
5. Just over 3 in 10 of the US market do not hold a valid passport, rising to half of those who report that they are 'fairly likely' to visit the UK. This suggests a further potential barrier to visiting the UK for this market.

Future trips to Wales

1. 15% of the US market report that they have already booked a vacation in Wales in the next few years, with over a third (37%) reporting that they are 'very interested – but have not yet booked'. Given indications that the US market has general familiarity with the UK, but limited familiarity with Wales specifically, high reported levels of interest in visiting Wales may (at least in part) reflect interest in visiting the UK generally, as opposed to interest in visiting Wales specifically.
2. 21% of Wales intenders state they are planning to take their trip to Wales in 2023, however the vast majority are planning to take their trip from 2024 onwards. It is worth noting that the proportion planning a visit to Wales this year is considerably lower than the proportion planning a visit to the UK this year, further highlighting that Wales lags behind other UK and Ireland destinations. Aligned with familiarity and previous visits, families and Experience Seekers are the most interested in taking a Wales trip. However, it should be noted that relative to other destinations Wales has weak associations with some of the preferred destination types and experiences of Experience Seekers (in particular 'cities and large towns', 'touring vacations', 'trying local food and drink' and 'adventure activities').
3. Potential trip-takers to Wales are most likely to take their trip in the summer months, but there is relatively strong interest off-peak too, driven by families.
4. Trips in Wales are likely to be 4-7 nights long, although 1 in 5 anticipate spending just 1-3 nights there. Just over 7 in 10 of those intending to take a trip to Wales anticipate staying elsewhere the UK and Ireland on their trip, as well as staying in Wales.

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Key findings (5)

4. There is similar interest in visiting North, Mid and South West Wales, although again this may reflect limited knowledge of Wales and the Welsh regions rather than concrete trip plans.
5. Just over half of US trip-takers would expect to travel around Wales independently, while around 2 in 5 anticipate travelling around as part of an organised tour or group.
6. Aligned with preferences and associations, the most popular destination type for a trip to Wales is ‘historic or heritage towns’. ‘Cities or large towns’ are the second most popular destination, although given that Wales is weakly associated with this destination type, this may be based on limited knowledge of specific destinations in Wales.
7. Intended activities broadly replicate general preferences amongst the US market with ‘food and drink’, ‘heritage and history’, ‘exploration’ and ‘the outdoors’, all dominant. Further underlining the importance of ‘food and drink’ to the US market, nearly 6 in 10 Wales trip intenders report that they would be interested in attending a festival or event related to the food and drink – the most popular type of festival/event among this market.
8. ‘Hotels or motels’ are the most popular type of accommodation amongst Wales trip intenders, almost twice as popular as ‘guest houses/B&Bs’.

Wales trip booking and information influences

1. Wales trip intenders are likely to use a range of sources to plan their next trip – ‘printed travel guide books/brochures’ are the most popular information source across all life stages. ‘Search engines’, ‘conversations with friends/family who have visited’, and ‘online travel agents’ are also popular sources. Among families, ‘online travel agents’ are the second most popular source.
2. Trips to Wales are most likely to be booked via an ‘online travel agent’ or ‘price comparison site’ – the latter is the most popular booking channel amongst families. 7 in 10 Wales trip intenders plan on booking some or all elements of their trip to Wales separately, as opposed to booking most or all elements of their trip as one package.
3. Perhaps notably, just over 1 in 3 Wales trip intenders anticipate booking their next Wales trip within 1 month of the travel date, while just under 1 in 5 expect to do so 1 to 3 months before the travel date. Just under a third expect to book the trip more than 3 months in advance of the trip. With most Wales trip intenders planning to take their trips from 2024, this underlines the need for Wales to remain at the forefront of consumers’ minds.

Key findings (6)

Non-visitors to Wales

1. 'Never having thought of Wales as a destination' is the most commonly reported reason for the US market not planning a visit there in the next few years, further underlining the opportunity to increase awareness of Wales as a vacation destination among this market. Cost is also a commonly cited barrier, suggesting promoting Wales as an affordable destination could be beneficial in attracting a considerable portion of the US market. However, the relative financial security of just over half of this market (see Slide 22) should also be considered.
2. Of the people who stated they do not intend to visit Wales in the next few years, 50% are seriously considering a vacation to London.
3. 17% of those not intending to visit Wales in the next few years state that they are 'very' or 'fairly' likely to take a day trip to Wales when on a vacation elsewhere in the UK in the next few years.

Media Impact

1. Whilst the majority of the US market report that they recall seeing or hearing about Wales, they are more likely to report having heard about all other UK and Ireland destinations tested. As with other measures presented in this report, indications of limited familiarity with Wales suggests that strong claims of seeing or hearing about Wales may reflect seeing or hearing about the UK generally, rather than about Wales specifically. 'Hearing other people talk about Wales' and 'often seeing Wales featured on TV, film or other media' are the most popular channels for engagement, whereas a lower proportion of the US market report 'recently seeing or hearing advertising or promotion' for Wales.
2. When asked directly if they have seen any promotions or marketing about Wales in the last year or so, 1 in 4 stated they had 'definitely' done so – again, this was highest amongst families. Retirees and older independents were the least likely to report having seen any promotions or marketing about Wales during this period. Amongst those who had seen promotions or marketing about Wales, 'promotion or content on social media' was the most common source – this was the case for all life stages other than retirees, for whom television advertising was the most common source. The next most popular source was 'social media content by a celebrity or travel influencer'. Over half of the US market that had seen Wales promotion had seen it on social media.

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Key findings (7)

Promotion and awareness of Wales from Football World Cup

1. Over a quarter of the US market stated they watched a Wales football match during the Men's Football World Cup which took place in November-December 2022 (this could have been in person or on TV). A further 47% report having seen 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 94% engaged with Wales at some level as a result of watching football coverage or seeing promotions of Wales during the World Cup – 'talking about Wales with other people' was the most common way of doing so.

Wrexham promotional activity

1. Just over 1 in 4 report having watched some or all of the 'Welcome to Wrexham' docuseries featured on Disney Plus – just over 1 in 4 also reported having heard of it. Families are the most likely to have engaged with the series, while retirees are the least likely to.
2. Nearly 9 in 10 of those who saw or heard about the docuseries report having engaged with Wales or Wrexham in some way, indicating that it has generated interest. 'Searching for information about Wrexham or Wales' was the most commonly reported channel of engagement.
3. Amongst those that have watched it, the docuseries has had a positive impact on perceptions of Wales and on levels of interest in visiting.

Sustainability

1. The majority of the US vacation market report being concerned about a range of sustainability issues, and 91% of those surveyed reported taking some action to help the environment– the most commonly reported actions are recycling, cutting down on plastic use, re-using items, saving energy, and buying local produce.
2. Over half of the US vacation market belong to the group 'Green Signalling Hedonists', who prioritise experiences, but respond well to sustainable messaging. This group also makes up just over half of Wales intenders. A further 1 in 4 fall into the sustainability segments 'Eco Evangelists' and 'Good Intentions' – the two segments that are the most passionate about protecting the environment and would expect vacation companies to appeal in this area. A further 13% are 'Climate Sceptics'. Overall, this suggests that promoting sustainability will be well received by most of the US market, even if most don't see it as essential. Just over 3 in 4 either 'strongly' or 'slightly' agree with the statement that large companies should be doing far more to help the environment.
3. A notable 1 in 6 report 'flying less or shorter distances' to help the environment. This suggests that the distance between Wales and the US could pose a barrier to visits from this group, although Wales's proximity to key destination airports such as London Heathrow (relative to Scotland and Ireland) may be a draw for these individuals.

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Demographics of the US vacation Market

Gender and life stage of the US vacation market

- There is a male bias amongst US respondents, with 3 in 5 (59%) falling into this category. ‘Families’ are the largest life stage, making up nearly half of respondents (45%), although it should be noted that this doesn’t necessarily mean that they plan on taking their children with them on a trip to the UK - only 55% of families planning a trip to Wales intend to travel with their children. Families are followed by ‘older independents’ and pre-nesters, who each make up around a quarter of the sample. ‘Retirement age’ is the smallest life-stage, making up just 7% of US respondents.

Figure 1. Gender of respondents, Percentage, All respondents

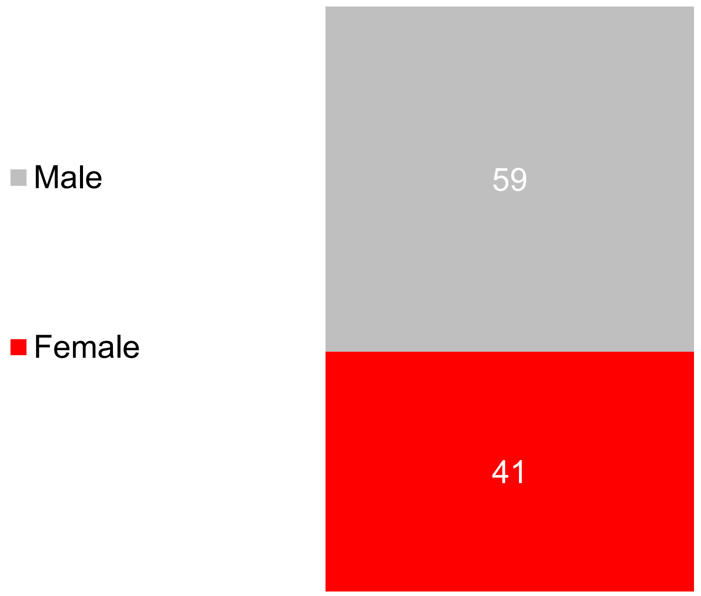
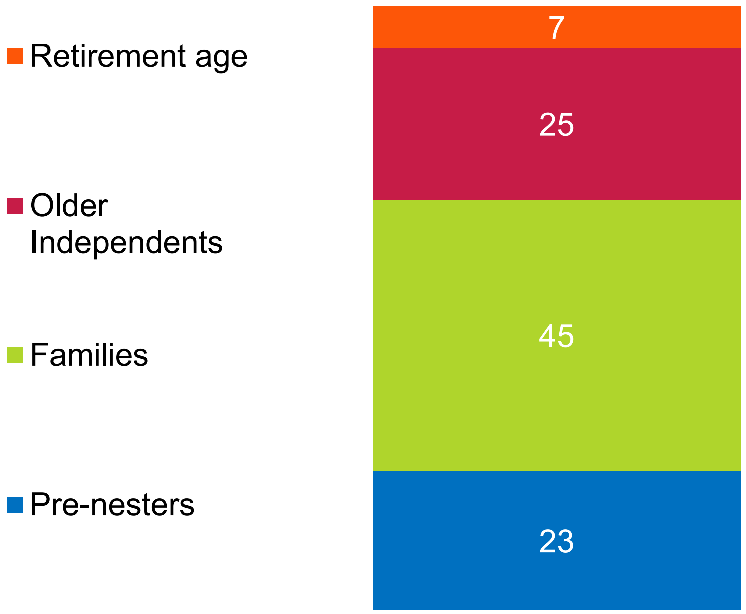


Figure 2. Life stage of respondents, Percentage, All respondents



Demographics questions. All data weighted.
Base: All respondents n=1,000

Relationship with Wales and VisitBritain segments

- Nearly 2 in 5 of the Welsh vacation market report having some sort of existing ties to Wales - 'having Welsh ancestry' (19%) is the most dominant, followed by 'having friends or family that live there' (14%). It should be noted however that when asked to name places associated with vacations in Wales (slide 45), the majority of the US market were unable to do so – including many of those with Welsh connections. This therefore suggests that claimed personal connections to Wales are either tenuous (i.e., do not indicate knowledge of Wales) or are misplaced (e.g., are more indicative of a connection with the UK more generally).
- 'Experience Seekers' are the largest segment amongst the US market, followed by Adventurers, Cultural Buffs, and Sightseers. Explorers are the smallest segment.

Figure 3. Relationship with Wales, Percentage, All respondents

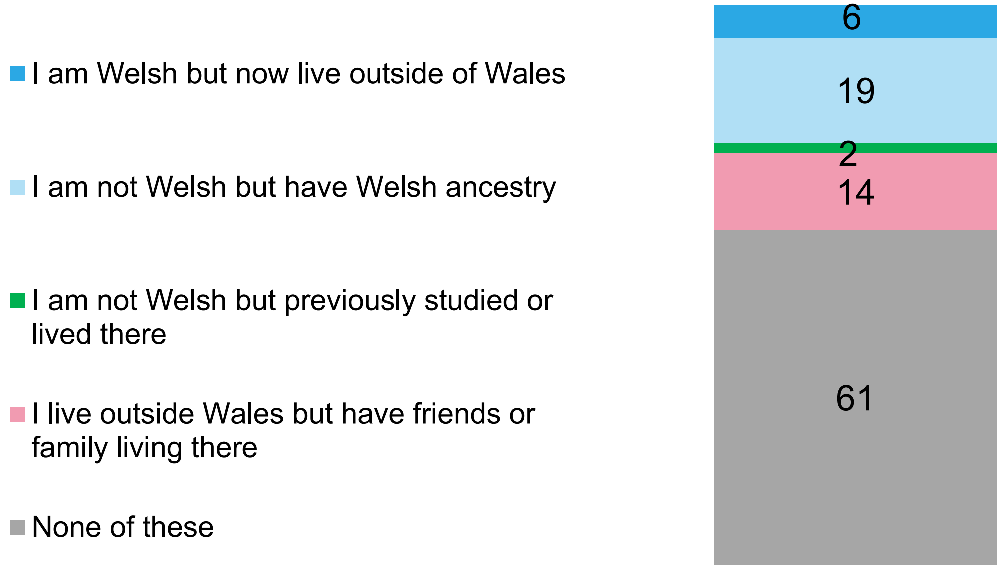
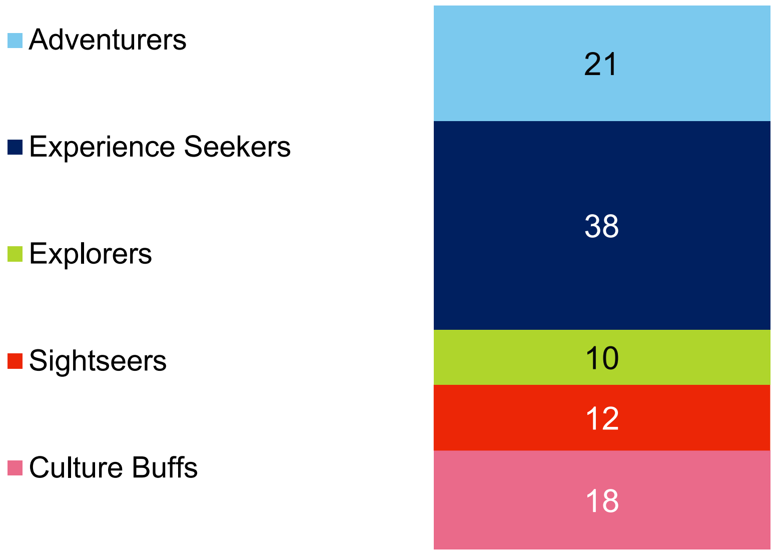


Figure 4. Visit Britain Segment of respondents, Percentage, All respondents

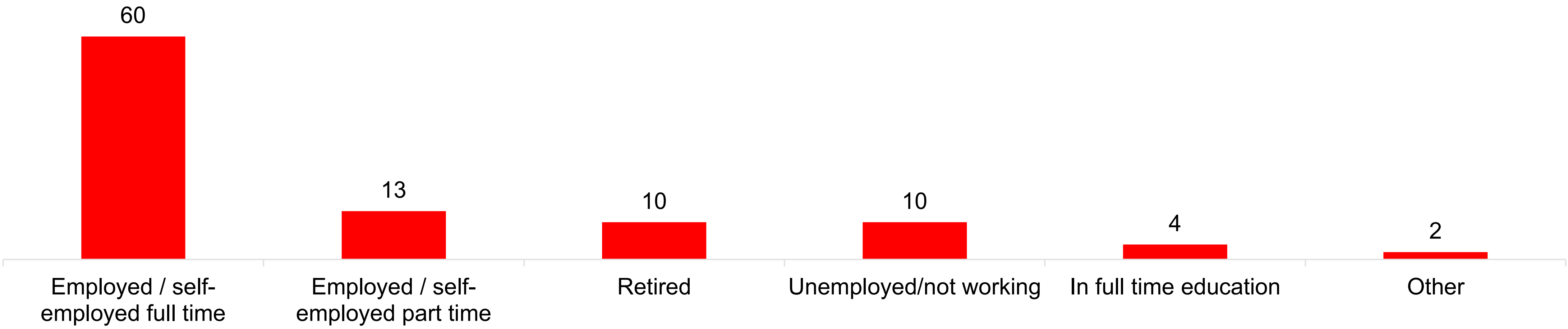


X9. Which, if any, of the following apply to you? For segment questions see introduction. All data weighted.
Base: All respondents n=1,000

Employment status of the US vacation market

- 3 in 5 of the US vacation market is in full-time employment and around 1 in 8 (13%) are working either employed or self-employed part time. 10% are unemployed/not working and only 4% 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=1,000

Region of residence of the US vacation market

- California and New York have the highest representation of any states amongst the US vacation market, followed by Florida and Texas. Broadly the fall-out of the US market replicates the population, with the notable exception of New York – the proportion of respondents from New York is twice as high in the US vacation market compared to the US population.
- By region, the proportion of respondents living in the Midwest is 5 percentage points lower than its distribution of the US population while Northeast respondents are 7 percentage points higher, driven by New York.

Figure 6. Origin of respondents, Percentage Top 10 + other, All respondents

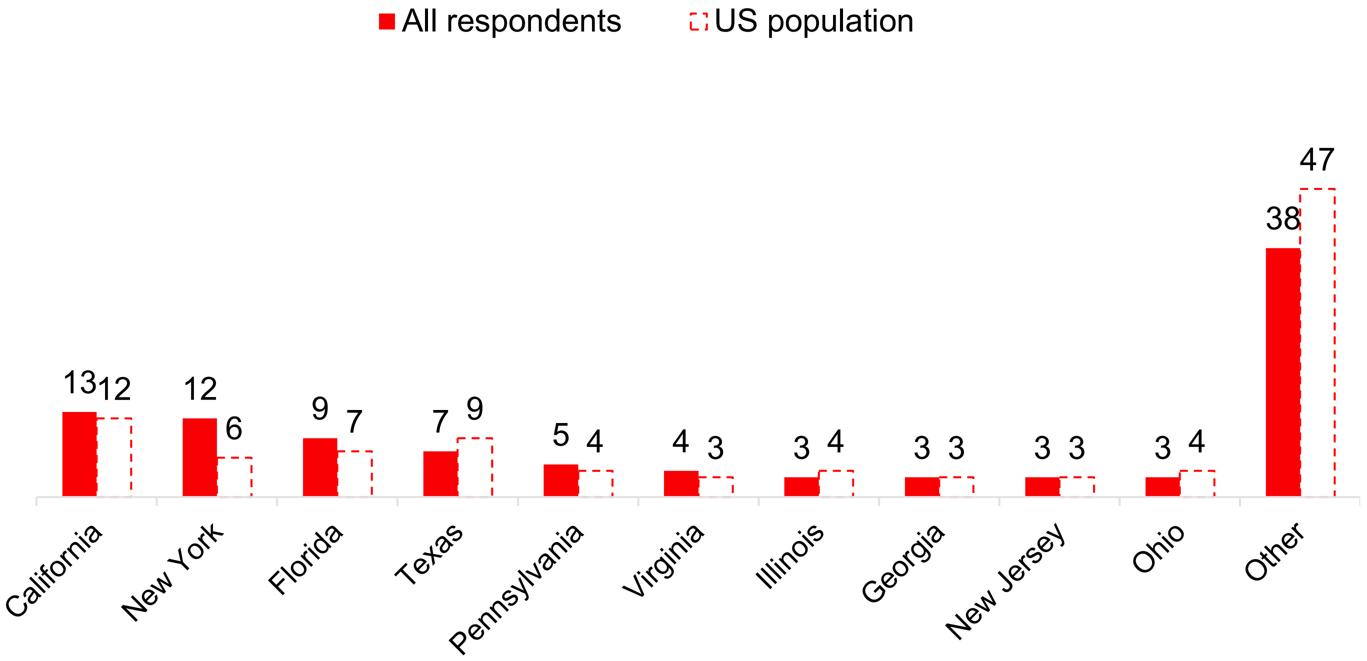
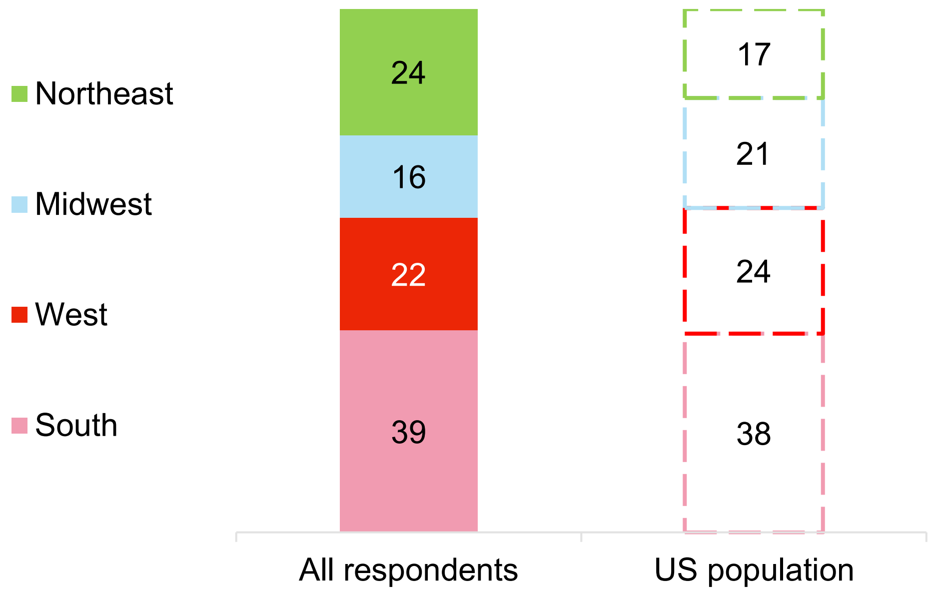


Figure 7. Origin of respondents by region, Percentage, All respondents



Demographics questions. S3. Where in the USA do you live? All data weighted. Base: All respondents n= 1,000. US population is sourced from Statista data 2021 & 2022: https://www.statista.com/statistics/183497/population-in-the-federal-states-of-the-us/
https://www.statista.com/statistics/240766/regional-distribution-of-the-us-population/

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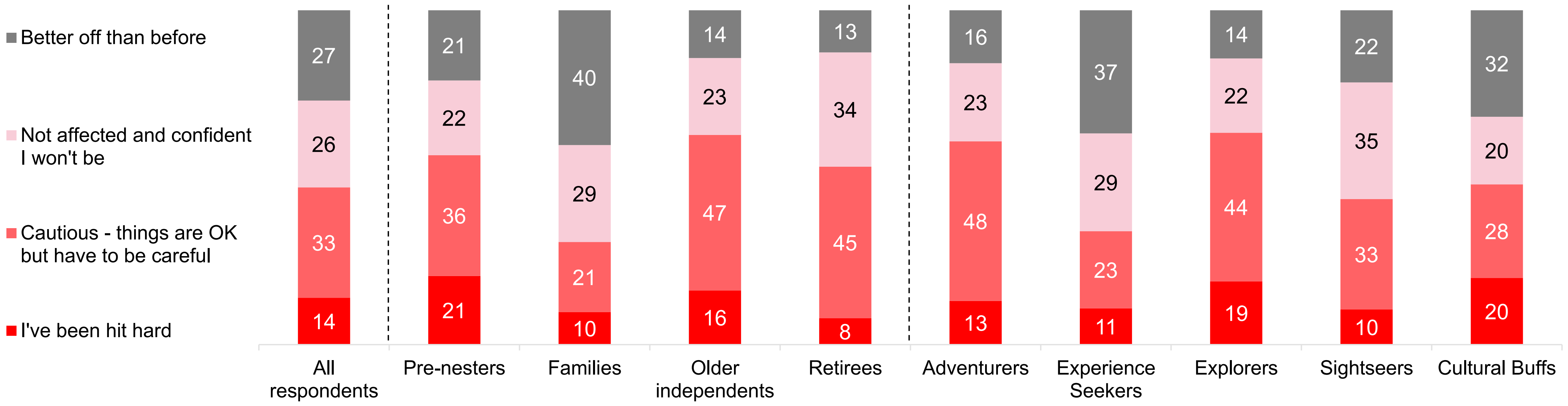
Attitude to ‘cost of living crisis’ of the US vacation market

- Nearly half (47%) of the US vacation 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. Just over a quarter (26%) believe they will not be affected, and a similar number (27%) say they are better off than before the crisis.
- Families are the most likely life stage to state they are ‘better off’ (40%). Older independents and retirees are more likely to be ‘cautious’, compared to other life stages.
- Amongst VisitBritain segments, the younger Experience Seekers and Cultural Buffs are the most likely to be ‘better off than before’, with Adventurers and Explorers more likely to be ‘cautious’ than other segments.

Figure 8. 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=1,000; Pre-nesters n=216; Families n=431; Older Independents n=260; Retirees n=88; Adventurers n=222; Experience Seekers n=368; Explorers n=106; Sightseers n=121; Cultural Buffs n=178

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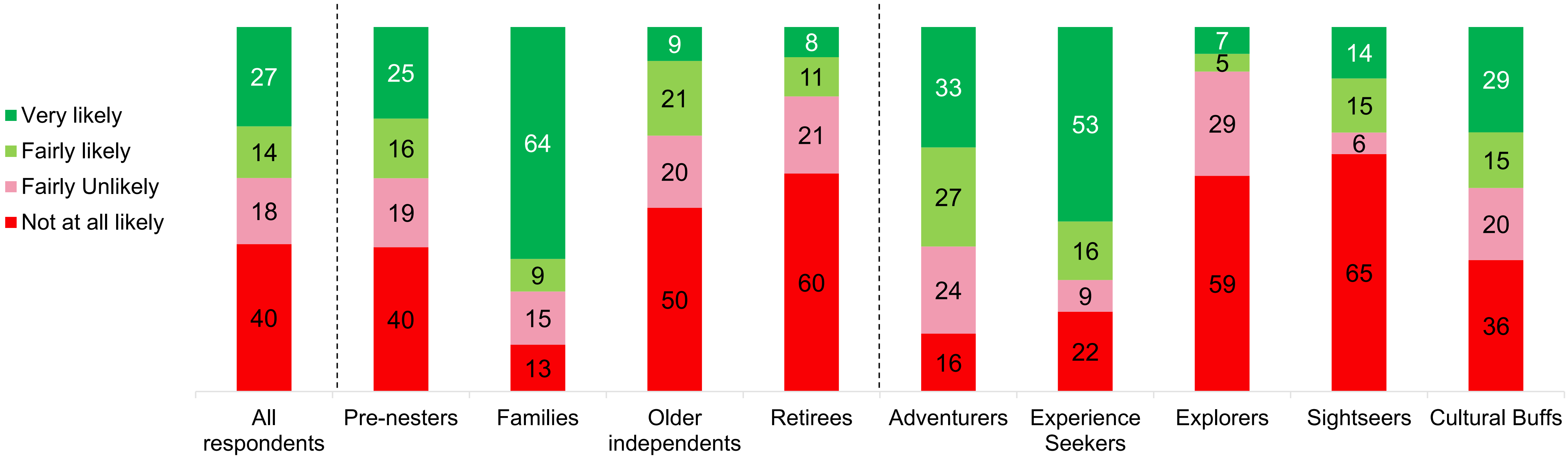
Trip Intention and Barriers

UK vacation intention in the next few years

- 2 in 5 (41%) of the US vacation market consider themselves either very or fairly likely to take a UK vacation in the next few years.
- Families and Experience Seekers are considerably more likely than other life stages to say they are 'very likely' to do so. Adventurers and Cultural Buffs also show relatively strong interest.

Figure 9. Likelihood of taking a UK vacation in the next few years, Percentage, All population

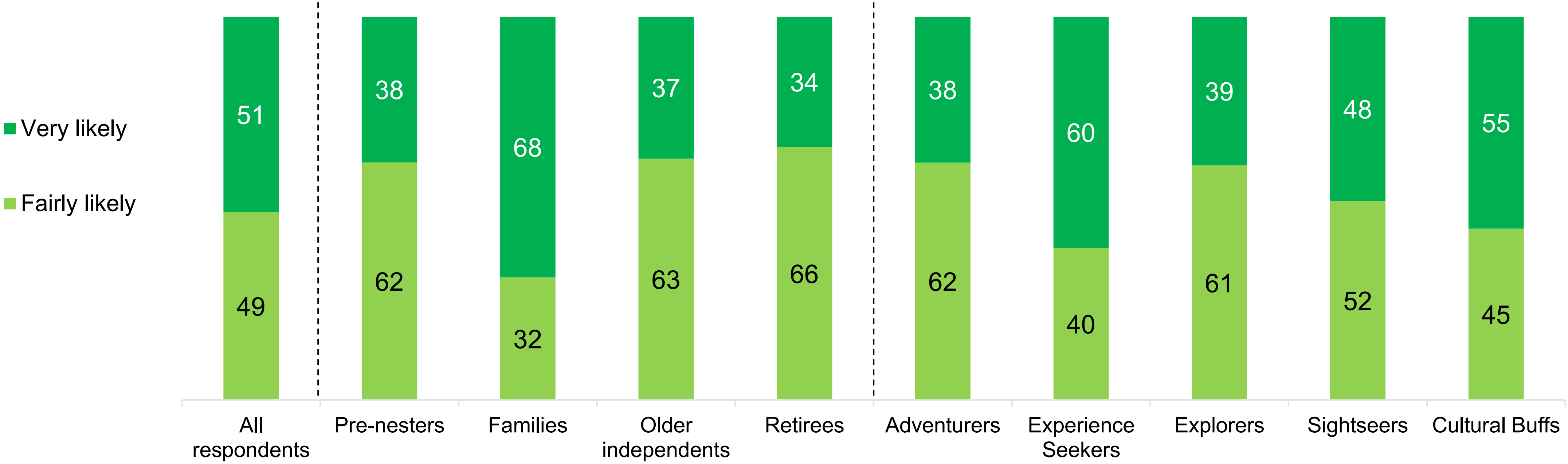


S6. How likely or unlikely are you to take a vacation in the UK in the next few years?
Base: All respondents n=218 ; Pre-nesters n=30*; Families n=48*; Older Independents n=74; Retirees n=66; Adventurers n=37; Experience Seekers n=46; Explorers n=72; Sightseers n=32*; Cultural Buffs n=31*
*Caution: Low base sizes – treat indicatively
Note: These results are based on a smaller nationally representative sub-set of the population, meaning base sizes are lower.

UK vacation intention in the next few years

- Just over half (51%) of the US vacation market are 'very likely' to take a UK vacation in the next few years.
- Likelihood is considerably higher amongst families – just over two thirds report that they are very likely to visit the UK in the next few years, compared to between a third and just under 4 in 10 amongst other life stages.
- Experience Seekers are more likely to report that they are very likely to take a UK vacation in the next few years than other segments – 3 in 5 (60%) are very likely to do so, closely followed by Cultural Buffs (55%).

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



S6. How likely or unlikely are you to take a vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431; Older Independents n=260; Retirees n=88; Adventurers n=222; Experience Seekers n=368; Explorers n=106; Sightseers n=121; Cultural Buffs n=178

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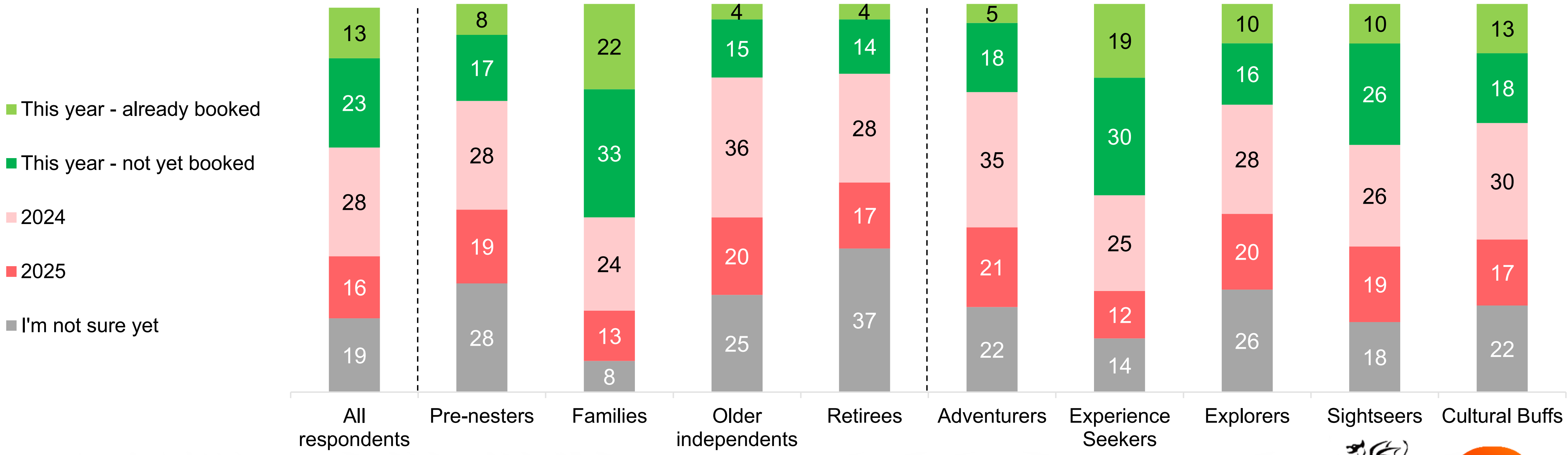
UK vacation intention in the next few years

- Just over 1 in 3 (36%) of the US market state that they are planning on taking a UK trip in 2023, with 13% having already booked. Close to half (44%) are planning their next UK trip in 2024 and 2025.
- Along with being the life stage most likely to take a UK vacation in the next few years, families are also the most likely to take an overnight UK trip this year (with 55% planning to do so). Retirees are the least likely to take a trip in 2023 and the most likely to be ‘unsure’.
- By segment, Experience Seekers are the most likely to take an overnight UK trip this year (with 49% planning to do so). Although Adventurers are the least likely to take a trip in 2023, they are the most likely to plan their UK trip in 2024.

Figure 11. 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 vacation in the UK? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88; Adventurers n=222; Experience Seekers n=368; Explorers n=106; Sightseers n=121; Cultural Buffs n=178

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Barriers to taking a UK overnight trip

- The largest barrier to taking a UK vacation amongst the US market is 'personal circumstances (e.g. work, family, health etc.)' (at 34%). Just over a quarter state 'there are lots of other places I want to visit first' (26%) and 'it is too expensive in the UK generally' (26%).
- 'Safety concerns when in the UK' (21%), 'exchange rates make the UK more expensive' (21%) and 'war in Ukraine deters me' (20%) are also notable barriers.

Figure 12. Barriers to take a UK vacation in next few years, Percentage, Top 7, All respondents

S9. Which, if any, of these are barriers to people like you taking a vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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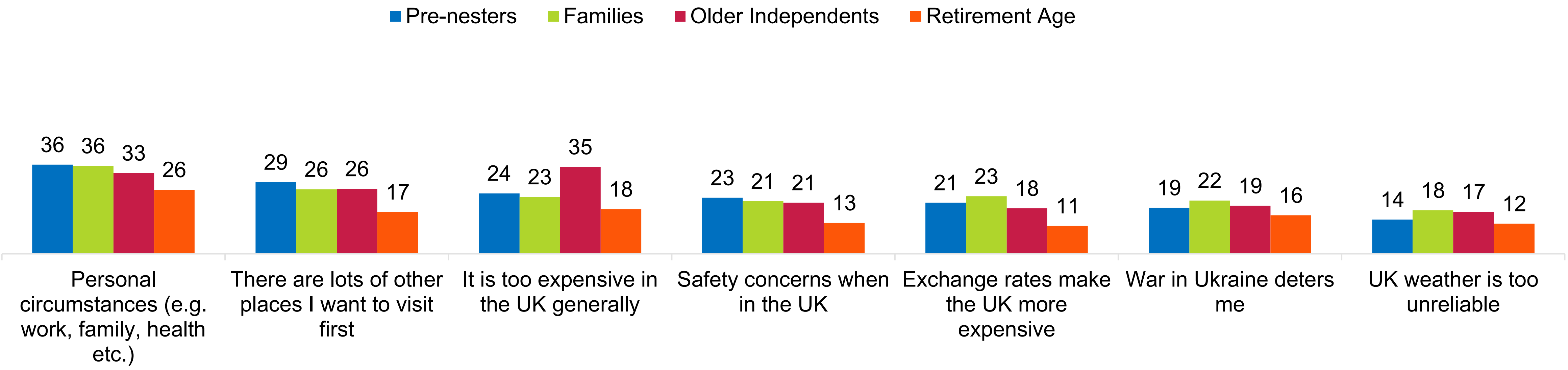
Barriers to taking a UK overnight trip by life stage

- 'Personal circumstances' is the leading barrier to UK travel amongst all life stages with the exception of older independents.
- For Older Independents, 'it is too expensive in the UK generally' is the leading barrier to visiting.

Figure 13. Barriers to take a UK vacation 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 vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88

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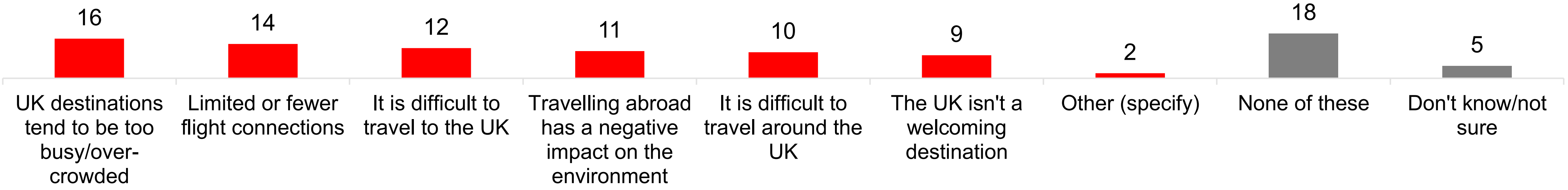
Barriers to taking a UK overnight trip

- Barriers such as ‘the UK isn’t a welcoming destination’ and ‘it is difficult to travel around the UK’ are the least likely to be cited amongst the US market.

Figure 14. Barriers to take a UK vacation in next few years, Percentage, Bottom 7, All respondents

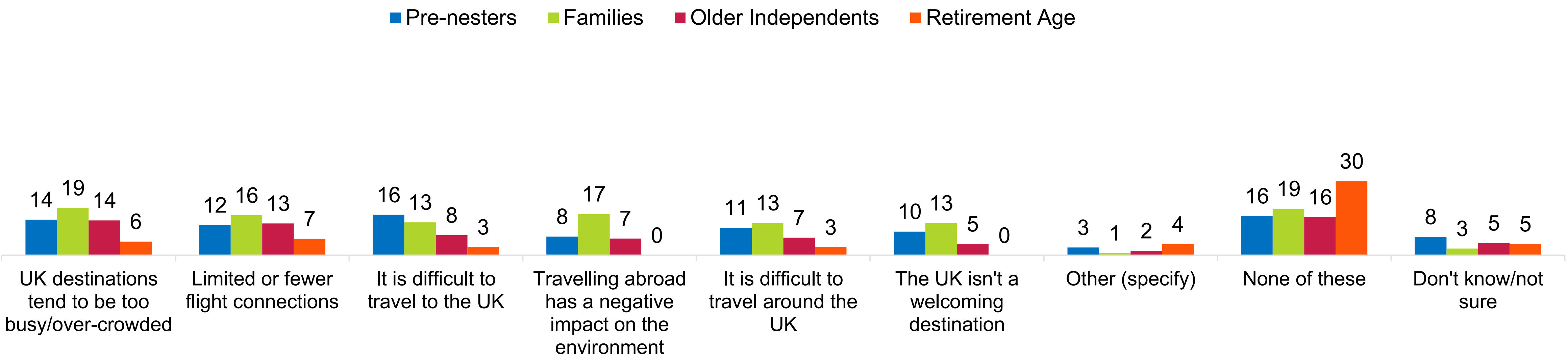


S9. Which, if any, of these are barriers to people like you taking a vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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 are more likely to report that ‘it is difficult to travel to the UK’ as a barrier to taking a vacation to the UK in the next few years than other life stages.

Figure 15. Barriers to take a UK vacation in next few years by life stage, Percentage, Bottom 7, All respondents

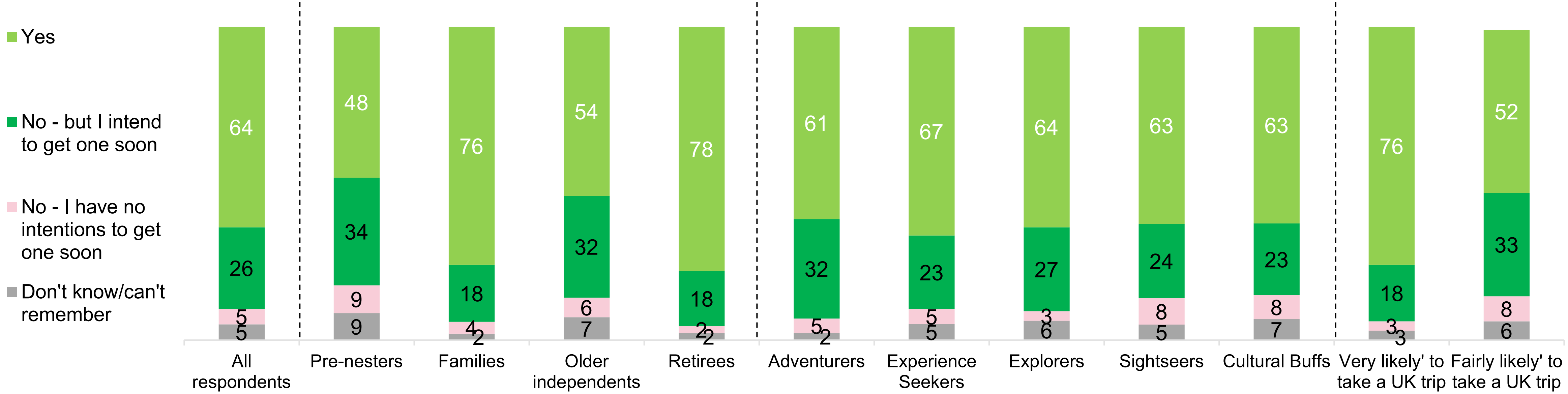


S9. Which, if any, of these are barriers to people like you taking a vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88

Hold a valid passport that allows travel to the UK

- Nearly two thirds (64%) of the US vacation market currently hold a passport that allows them to travel to the UK, with a further 1 in 4 (26%) 'intending to get one soon'. A small proportion either don't plan on getting a passport soon (5%) or 'don't know' if they have one that enables UK travel (5%).
- Families and retirees are the life stages most likely to hold a valid passport – each at over three quarters. Notably, only around half of pre-nesters and older independents hold a passport. There is limited variation by segment – the proportions reporting that they have a valid passport are close to the overall average.
- Positively, a large majority (76%) of those 'very likely to take a UK trip in the next few years' hold a passport. However, only half (52%) of those 'fairly likely' to take a UK trip have one, suggesting a lack of passport may be a barrier to travel to the UK.

Figure 16. Hold a valid passport to travel to the UK, Percentage, All respondents



X10: Finally, do you currently hold a valid passport that allows you to travel to the UK?
All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431; Older Independents n=260; Retirees n=88; Adventurers n=222; Experience Seekers n=368; Explorers n=106; Sightseers n=121; Cultural Buffs n=178

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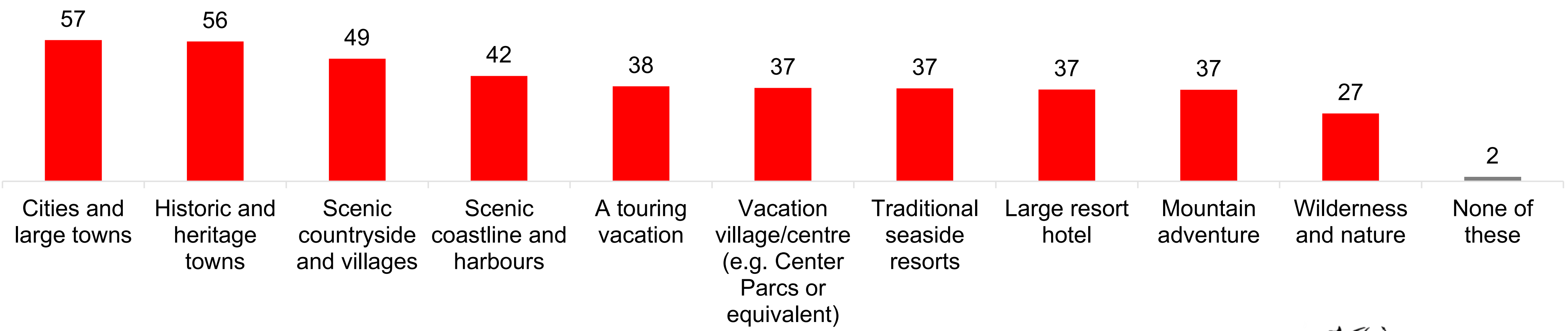
Trip Influences and Preferences

Destination types seriously considering for a UK overnight trip

- ‘Cities and large towns’ and ‘historic and heritage towns’ are the destination types that the US vacation market are most likely to be ‘seriously considering’ taking a UK vacation in the next few years (at 57% and 56% respectively). ‘Scenic countryside and villages’ and ‘scenic coastline and harbours’ also generate strong consideration.
- A slightly smaller but notable proportion are interested in ‘touring vacations’, ‘vacation villages/centres’, ‘traditional seaside resorts’, ‘large resort hotels’ and ‘mountain adventure’.
- On average, the US market would seriously consider four destination types for a UK vacation. 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, 74% of those that would consider a ‘scenic countryside and village’ would also consider a ‘historic and heritage town’; 70% who consider ‘cities and large towns’ would also consider ‘historic and heritage towns’.

Figure 17. Destination types seriously considering a vacation 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 vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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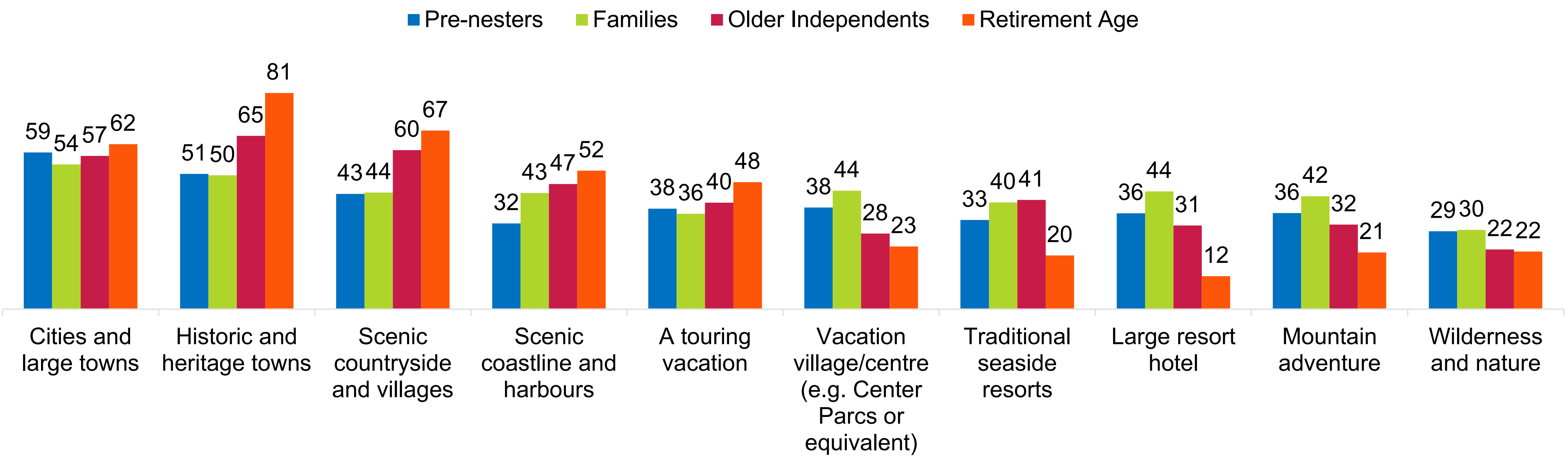
Destination types seriously considering – by life stage

- There is some variation in destination type preference by life stage. ‘Cities and large towns’ are a strong preference for all life stages, whilst ‘historic and heritage towns’ are considerably more appealing to retirees, and older independents. Older independents and retirees are also more likely to favour trips to ‘scenic countryside and villages’, ‘scenic coastline and harbours’, and ‘touring vacations’.
- ‘Vacation villages/centres’, ‘large resort hotels’ and ‘mountain adventure’ are more likely to appeal to families and pre-nesters than to other life stages.

Figure 18. Destination types seriously considering a vacation 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 vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88

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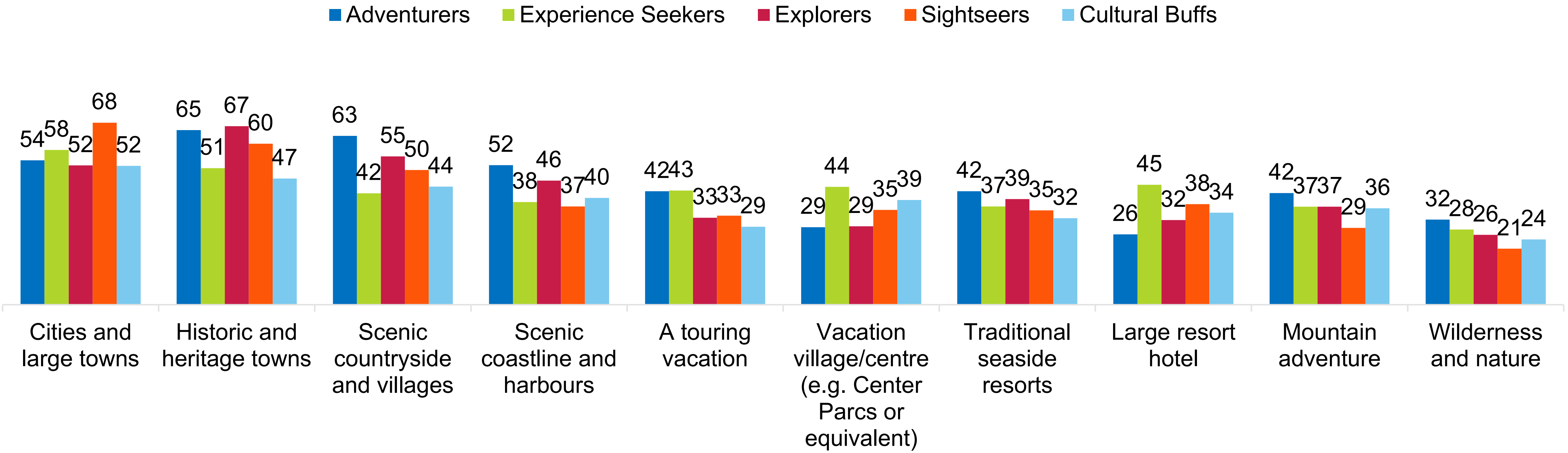
Destination types seriously considering – by segment

- Over two thirds of Sightseers seriously consider ‘cities and large towns’ as a type of destination for their future UK vacations, the highest among all segments. Adventurers and Explorers are more likely to seriously consider ‘historic and heritage towns’, ‘scenic countryside and villages’ and ‘scenic coastline and harbours’. Experience Seekers index higher on ‘vacation villages/centres’ and ‘large resort hotels’. Experience seekers and adventurers are more likely than any other segment to consider touring holidays.

Figure 19. Destination types seriously considering a vacation in next few years, Percentage, All respondents

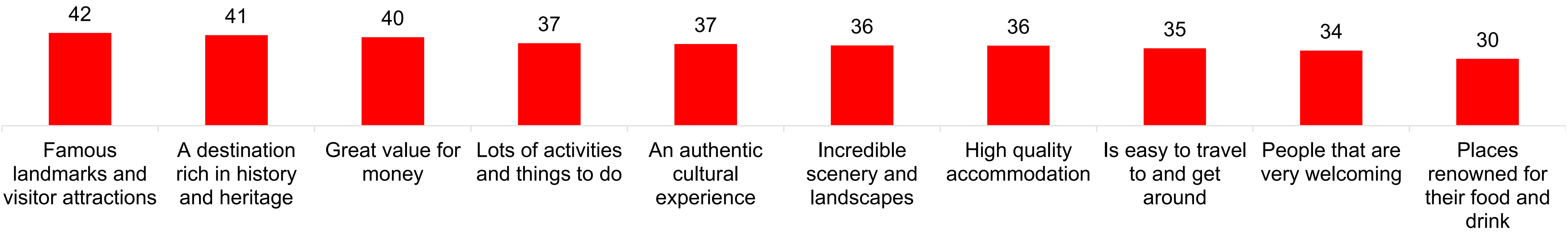


B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000; Adventurers n=222; Experience Seekers n=368; Explorers n=106; Sightseers n=121; Cultural Buffs n=178

Destination influences for a UK overnight trip

- A broad range of factors influence destination choice for UK vacations amongst the US market – famous landmarks and visitor attractions, history and heritage, great value for money, activities and an authentic cultural experience all feature in the top five destination influences.
- 'Incredible scenery and landscapes', 'high quality accommodation', 'is easy to travel to and get around', 'people that are very welcoming', and 'places renowned for their food and drink' make up the remainder of the ten most commonly reported influences.

Figure 20. Destination influences for a UK trip, Percentage, Top 10, All respondents

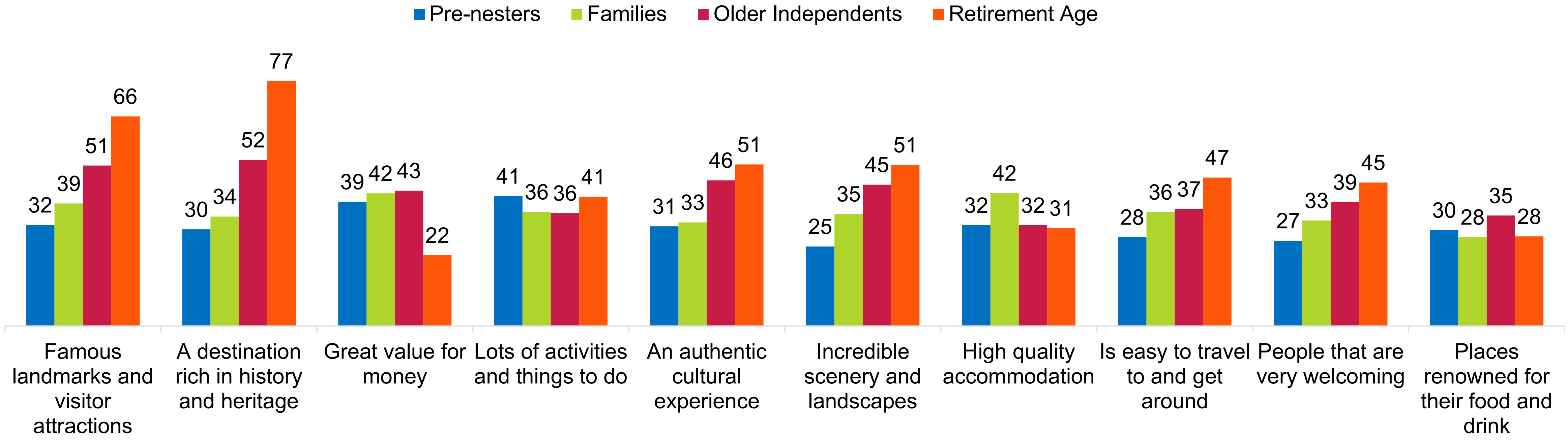


B2. Below is a list of influences people have given for choosing their vacation destinations. Which, if any, are most influential when you think about choosing vacations in the UK? All data weighted.
Base: All respondents n=1,000

Destination influences for a UK overnight trip – by life stage

- Among the ten most commonly reported destination influences, broadly similar proportions of respondents reported each influence (between 30% and 42%). However, there are large differences in reported influences by life stage. ‘Famous landmarks and visitor attractions’ and ‘history and heritage’ are much more important amongst older life stages and around twice as influential to retirees as to pre-nesters and families.
- Some factors have cross-generational influence – all life stages are influenced to a strong degree by ‘lots of activities and things to do’ and ‘high quality accommodation’ – the latter is the joint most important influence for families, alongside ‘great value for money’.

Figure 21. 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 vacation destinations. Which, if any, are most influential when you think about choosing vacations in the UK? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88

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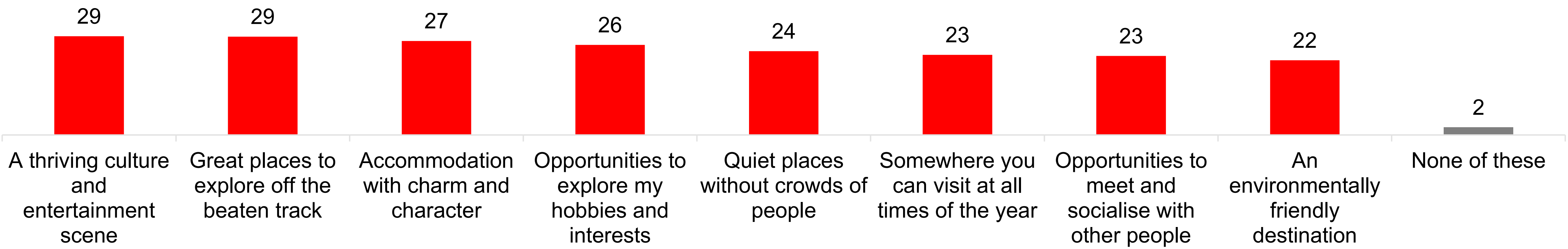
Destination influences for a UK overnight trip

- A range of other destination influences are also important to the US market, including ‘a thriving culture and entertainment scene’, ‘great places to explore off the beaten track’ and ‘accommodation with charm and character’. ‘Opportunities to meet and socialise with other people’ and ‘an environmentally friendly destination’ are the least reported influences but remain important for just under 1 in 4.

Figure 22. Destination influences for a UK trip, Percentage, Bottom 8, All respondents



B2. Below is a list of influences people have given for choosing their vacation destinations. Which, if any, are most influential when you think about choosing vacations in the UK? All data weighted.
Base: All respondents n=1,000

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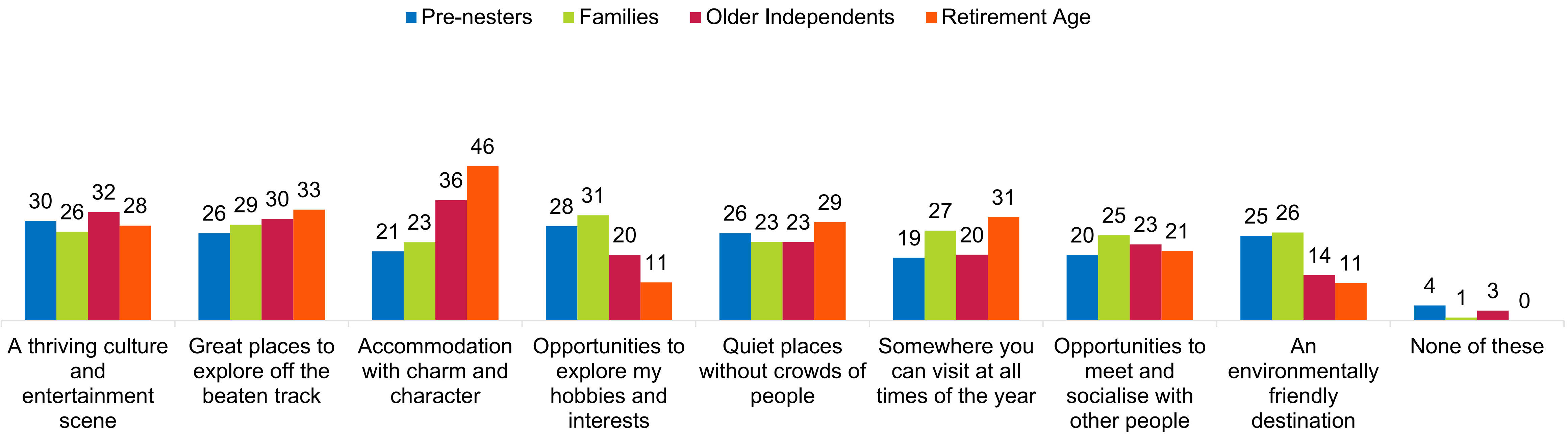
Destination influences for a UK overnight trip – by life stage

- Notably, 'accommodation with charm and character' is more influential among retirees and older independents – for retirees it is their 6th most important influence, and for older independents 7th most important (compared to 16th amongst pre-nesters and 17th amongst families).
- 'A thriving culture and entertainment scene' is important for pre-nesters (at 30%, it is their 6th most important influence overall). Pre-nesters and Families are also more influenced by a destination being environmentally friendly than older life stages.

Figure 23. 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 vacation destinations. Which, if any, are most influential when you think about choosing vacations in the UK? All data weighted
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88

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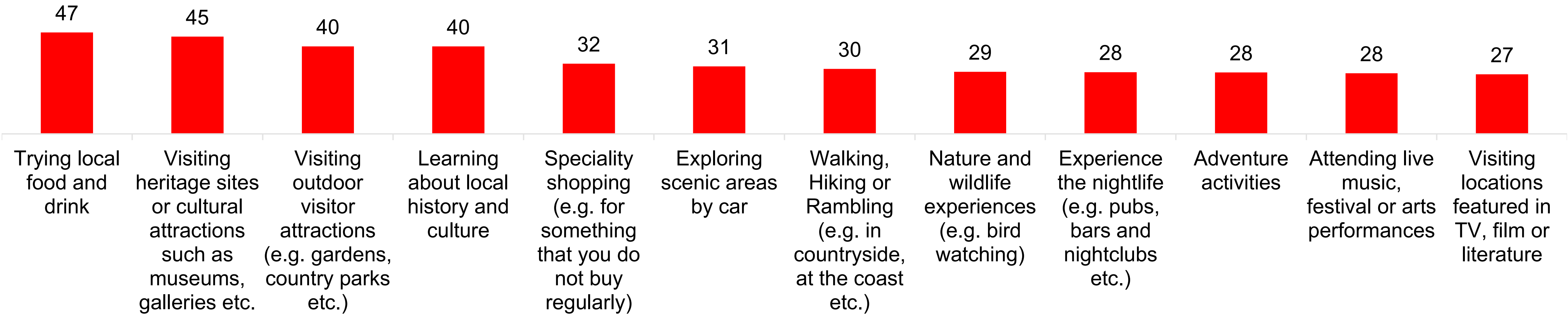
Experiences would most like to do on a UK vacation

- In terms of experiences, 'trying local food and drink' (47%) is what the US vacation market would most like to do on a UK vacation, followed closely by 'visiting heritage sites or cultural attractions' (45%), 'visiting outdoor visitor attractions' (40%) and 'learning about local history and culture' (40%). 'Speciality shopping' (32%) is also popular, as is 'exploring scenic areas by car' (31%) and outdoor experiences such as 'walking, hiking or rambling' (30%) and 'nature and wildlife experiences' (29%).

Figure 24. 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 vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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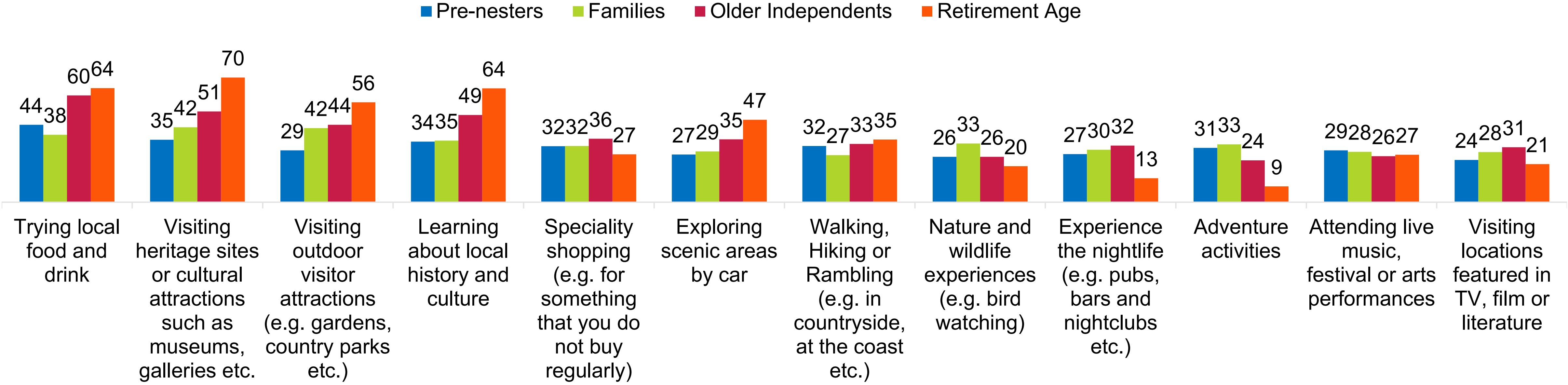
Experiences would most like to do – by life stage

- Aligned with their reported destination influences, 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 ‘trying local food and drink’. There is broadly cross-generational appeal in ‘speciality shopping’, ‘attending live music, festival or arts performances’, ‘visiting locations featured in TV, film or literature’ and outdoor activities such as ‘walking, hiking or rambling’ and ‘nature and wildlife experiences’.
- Younger life stages are more likely to show a preference for ‘experiencing the nightlife’ and ‘adventure activities’ than retirees – however, older independents show similar levels of interest in these activities.

Figure 25. 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 vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88

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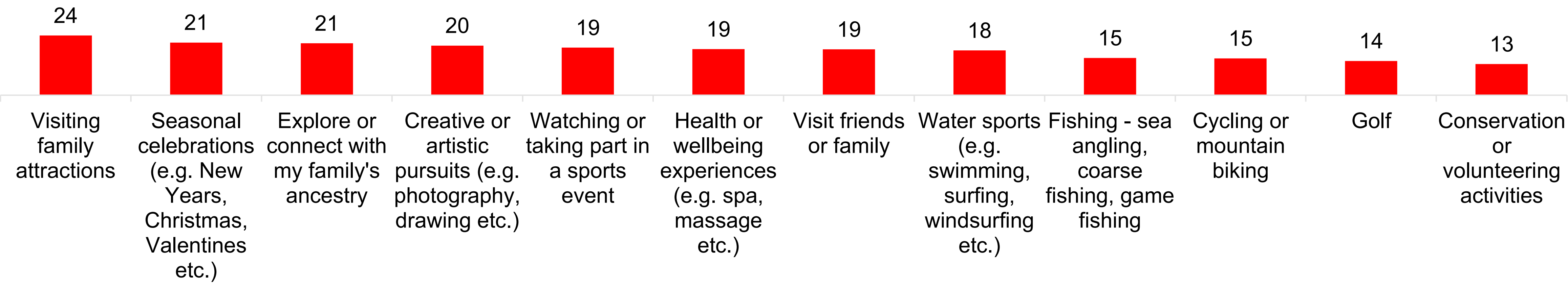
Experiences would most like to do on a UK vacation

- A range of other activities appeal to a more niche audience. For example, 'visiting family attractions' are likely to be undertaken by 24% of UK vacation takers and 21% are likely to partake in 'seasonal celebrations' and 'explore or connect with my family's ancestry'.
- Activities such as 'conservation or volunteering' and 'golf' are least likely to be preferred experiences on a vacation in the UK.

Figure 26. 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 vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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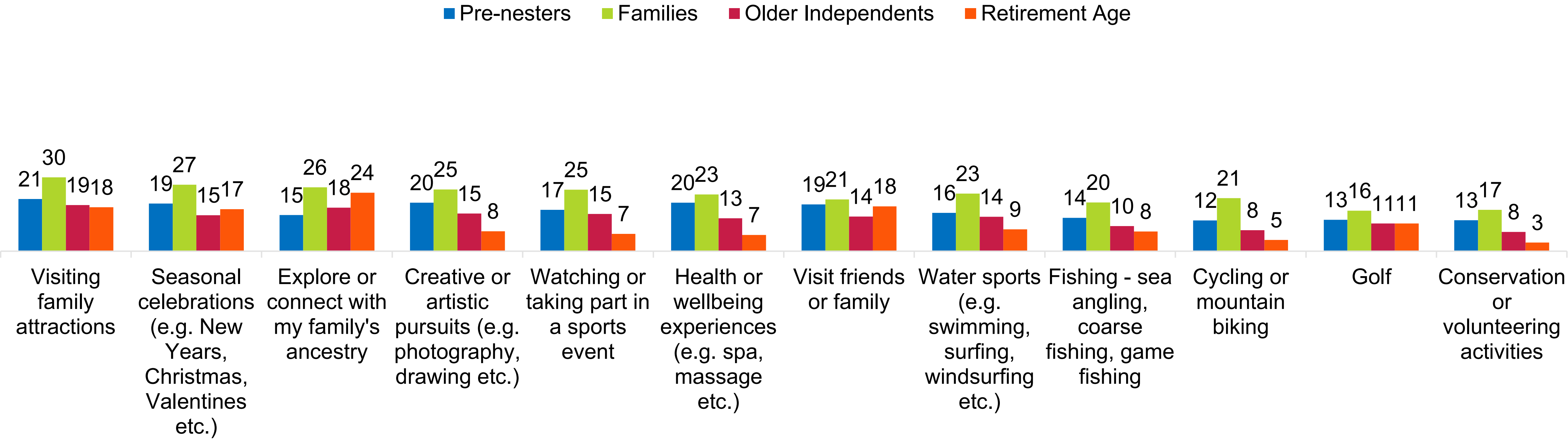
Experiences would most like to do – by life stage

- Unsurprisingly, ‘visiting family attractions’ is more popular among families than among other life stages.
- Families index high on a number of more ‘niche’ activities, including ‘seasonal celebrations’, ‘creative or artistic pursuits’, ‘watching or taking part in sports events’, ‘health or wellbeing experiences’, ‘water sports’ and ‘cycling or mountain biking’.
- ‘Exploring or connecting with my family’s history’ also indexes high among families, as well as among retirees.

Figure 27. 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 vacation in the UK in the next few years? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88

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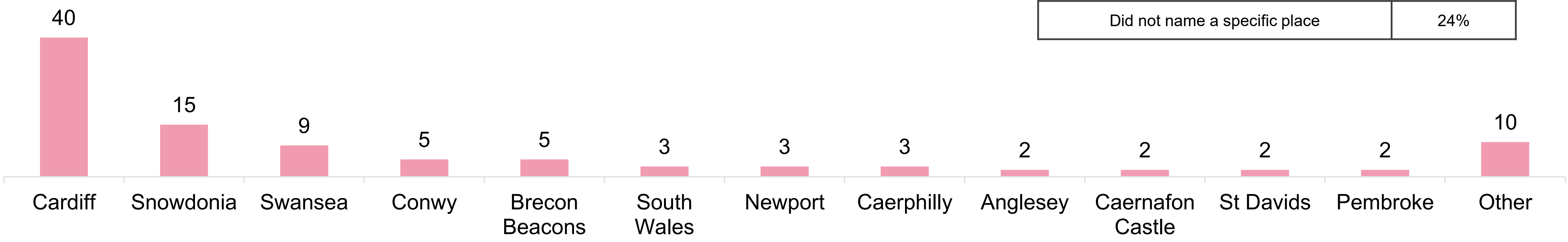
Destination Relationships and Previous Visits

Places associated with vacations in Wales

- When asked to name places in Wales they associated with vacations, only 9% of the US vacation market were able to name specific places in Wales, whilst some mentioned iconic sites elsewhere in the UK (e.g., Loch Ness, Downing Street, etc.) This strongly suggests that the US market's strong claimed familiarity with Wales (see pages 46 to 52) is more reflective of a strong interest in the UK than actual knowledge of Wales as a country. Caution should therefore be applied when interpreting Wales associations, which are likely to be influenced by wider perceptions of the UK, and do not necessarily indicate knowledge or experience of Wales specifically.
- Of those that were able to name places in Wales, they were most likely to think of Cardiff (40%), followed by Snowdonia (15%). Despite 'historic and heritage towns' being the 2nd most popular destination type, only 2% spontaneously mentioned St David's.

Figure 28. Specific places associated with Wales, Percentage of mentions, All respondents that could name a place in Wales

Net: No. of accurate mentions	9%
Nothing in particular comes to mind	54%
Don't know/not sure	13%
Did not name a specific place	24%



E2. When you think of Wales as a place to take vacations, which specific places come to mind? All data weighted.
Base: All respondents n=1,000
Note: All responses under 1% are combined into 'other'.

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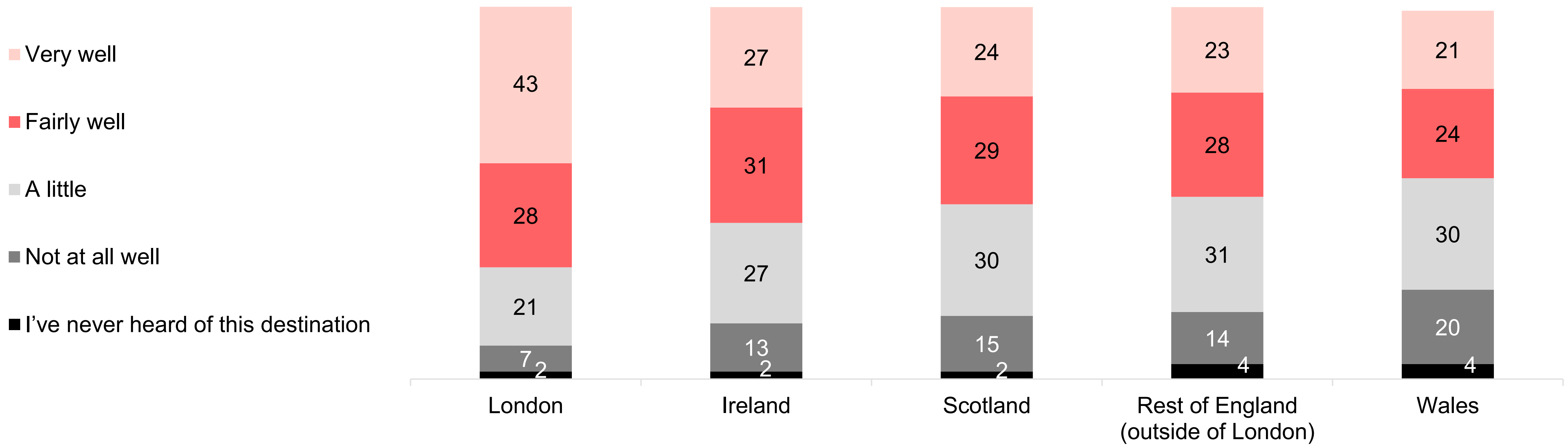
Familiarity with Wales and other destinations

- Of the destinations tested within this research, the US vacation market is most familiar with London, 71% stating that they know what there is to see and experience there 'very' or 'fairly well'. 45% report that they know what there is to see and experience on vacation in Wales 'very' or 'fairly well'.
- Familiarity with Wales is lower than any other destination tested, although with the exception of London, the gap is not large - 51% consider themselves familiar with the rest of England, 53% with Scotland, and 58% with Ireland. As illustrated earlier in the report (slide 19), familiarity with Wales is also higher amongst those who report having connections to Wales – over 4 in 5 of those that previously studied or lived in Wales report being 'very' or 'fairly' familiar with Wales.

Figure 29. 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 vacation in each of these parts of the UK and Ireland? All data weighted. Base: All respondents n=1,000
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed familiarity is exaggerated or misplaced

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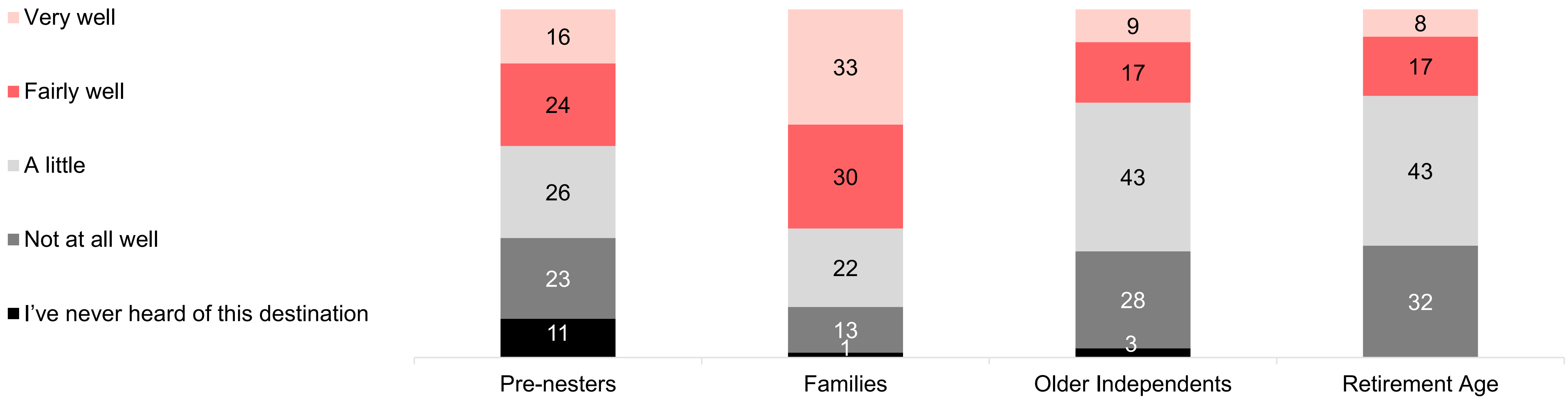
Familiarity with Wales by life stage

- Families report the strongest familiarly with Wales – just under two thirds (63%) say that they know what there is to see and experience on a vacation in Wales ‘very’ or ‘fairly well’. Other life stages report more limited familiarity with Wales with 1 in 9 pre-nesters stating they’ve never heard of it.

Figure 30. Familiarity with Wales by life stage, Percentage, All respondents



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Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed familiarity is exaggerated or misplaced

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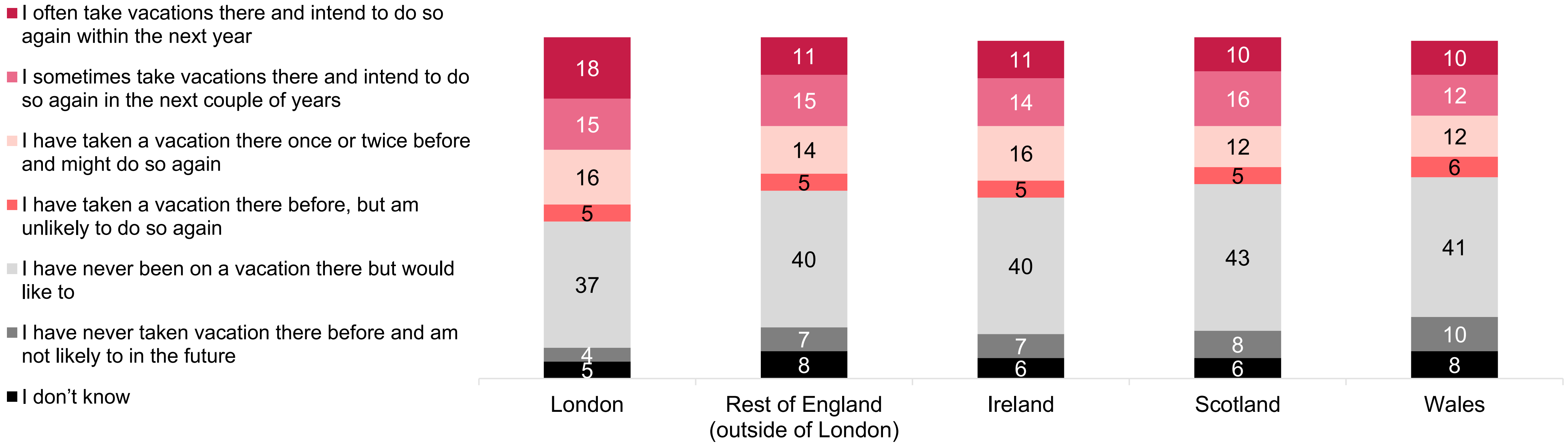
Loyalty with Wales and other destinations

- London is the part of the UK and Ireland most likely to generate regular vacations, with a third of the US vacation market 'often' or 'sometimes' going there, and just over half (54%) having visited at some point in the past. Wales is least likely to have attracted visits from the US market.
- Positively, 41% of the US vacation market have never been to Wales for a vacation but would like to, suggesting potential to attract new visitors, although this likely reflects receptivity to the UK overall, rather than intentions to visit Wales specifically.
- 18% have either never been and are not likely to or 'don't know' - the largest proportion of all destinations.

Figure 31. 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=1,000
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed visits are exaggerated or misplaced

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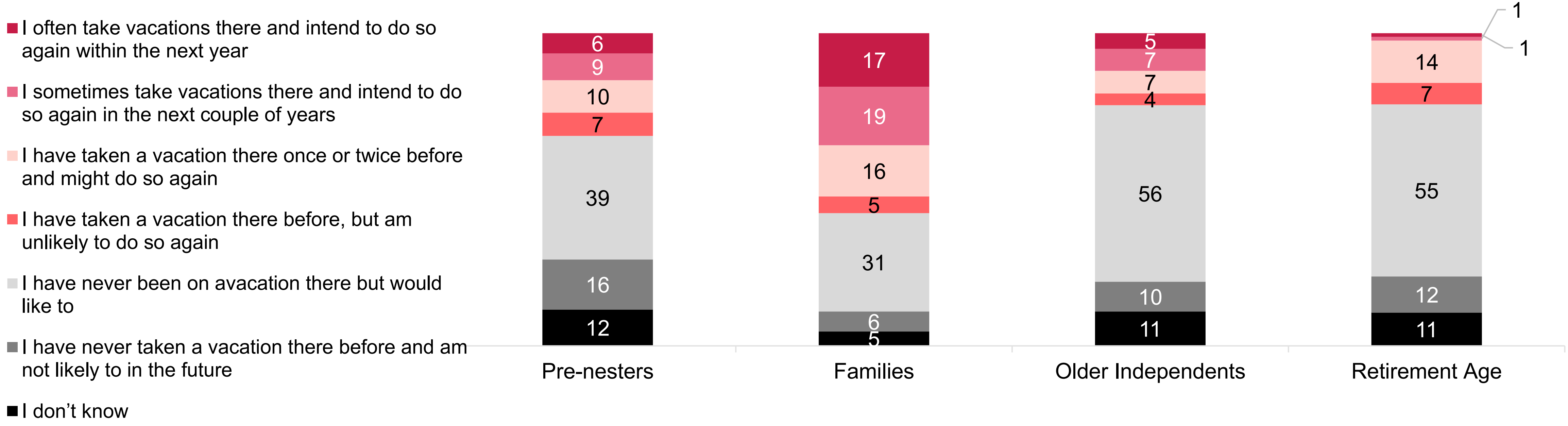
Loyalty with Wales by life stage

- Families are the most likely to report 'often' or 'sometimes' taking vacations to Wales (36%), and are also the most likely to have visited Wales at some point in the past. Retirees are the least likely to visit Wales 'often' or 'sometimes'.
- Over half of older independents and retirees have never been to Wales and would like to, suggesting the strongest potential to convert intentions into visits lies amongst these life stages. Aligned with their limited familiarity with Wales as a vacation destination, pre-nesters are the life stage the most likely to never have taken a vacation to Wales, or be likely to in the future.

Figure 32. 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 n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed visits are exaggerated or misplaced

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Previous visits to each destination

- London was the most visited overnight destination from the US vacation market in 2022-2023, with 18% of respondents having visited, followed by the Rest of England. Perhaps notably, visitation to Wales since 2022 is on a par with visitation to Ireland and Scotland during the same period. However, given the US market's limited knowledge of Wales as a destination, this may simply reflect previous visits to the UK more generally.

Figure 33. Previous visits to each destination, Percentage, All respondents

C4. When did you last visit these places for a vacation? All data weighted.
Base: All respondents n=1,000
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed visits are exaggerated or misplaced

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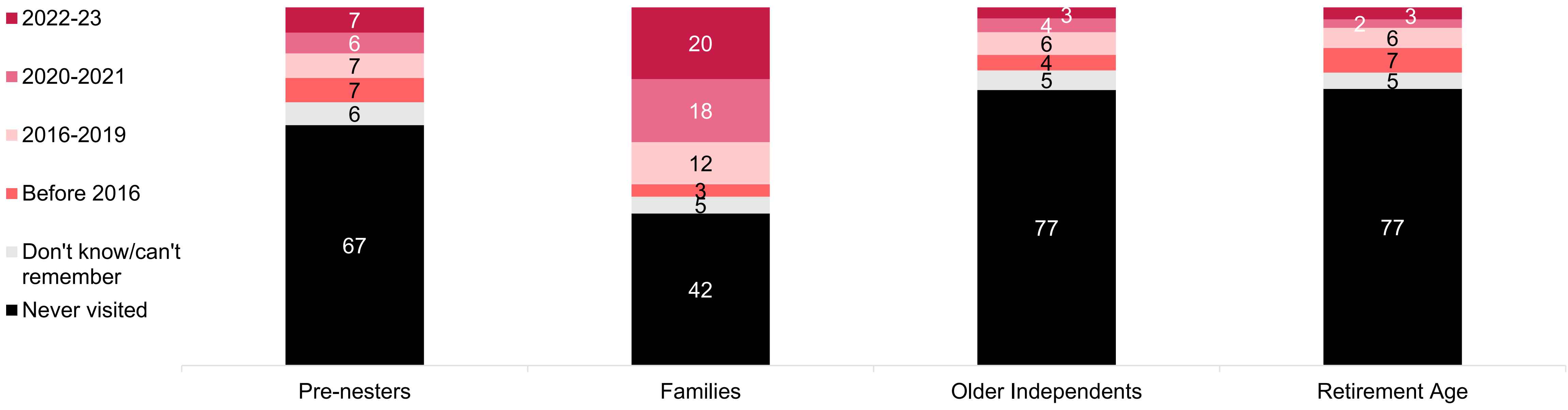
Previous visits to Wales by life stage

- Aligned with general loyalty to Wales as a destination, families are the life stage most likely to have taken a trip in Wales in 2022 or 2023 (with 20% saying they have done so).
- Older independents and retirees show the lowest levels of recent visitation, and they are most likely to have never visited Wales before.

Figure 34. Previous visits to Wales by life stage, Percentage, All respondents



C4. When did you last visit these places for a vacation? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed visits are exaggerated or misplaced

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Previous visits to each destination by life stage and segment

- Families index highest compared to other life stages on previous visits to all UK and Ireland destinations. Nearly 3 in 5 families report having taken one or more Wales trip. Notably, the majority of retirees (63%) have visited London, but only a minority have visited the other UK and Ireland destinations.
- Amongst the segments, the Experience Seekers and Cultural Buffs are most likely to report having taken a trip to each of the different UK destinations. Just over half of Experience Seekers report having been to Wales, similar to other destinations.

Figure 35. Previous visits to destinations by life stage, Percentage, All respondents

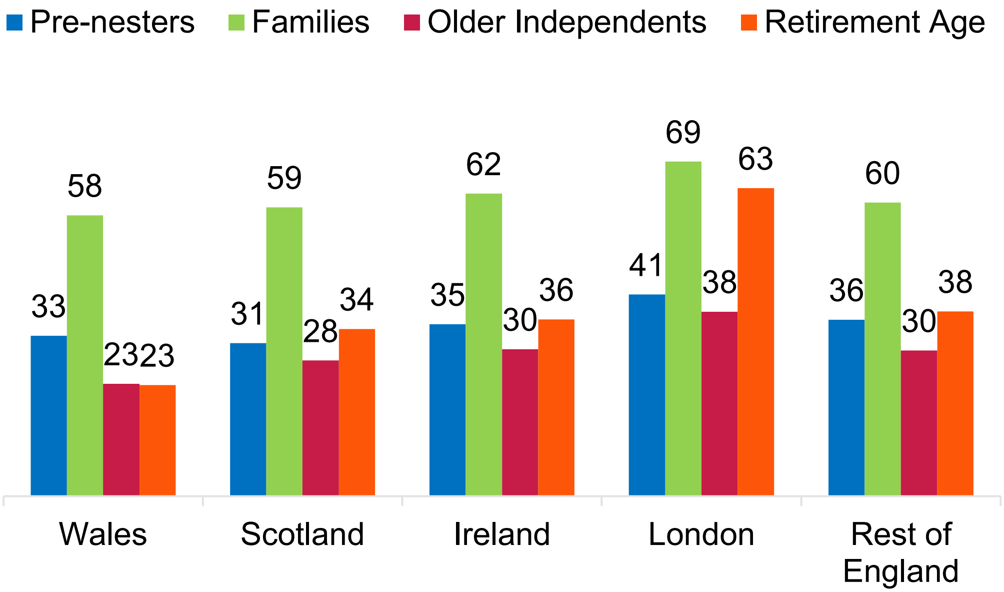
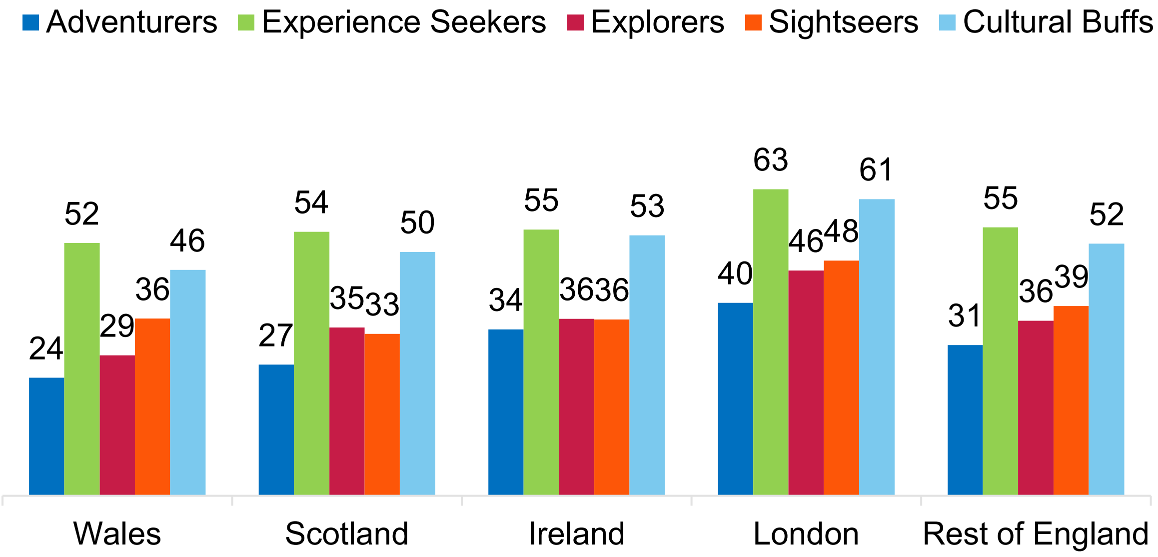


Figure 36. Previous visits to destinations by segment, Percentage, All respondents



C3. Which of the following statements best applies to you when it comes to visiting these destinations? All data weighted.
Base: Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88; Adventurers n=222; Experience Seekers n=368; Explorers n=106; Sightseers n=121; Cultural Buffs n=178
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed visits are exaggerated or misplaced

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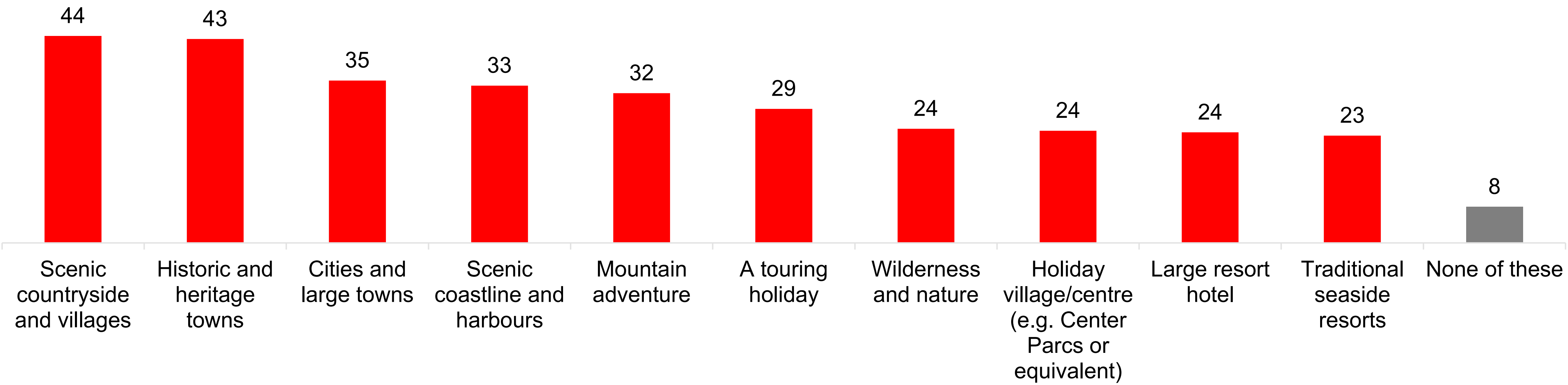
Destination Associations and Preferences

Destination types associated with Wales

- The US market are most likely to associate Wales with ‘scenic countryside and villages’ and ‘historic and heritage towns’. There is also relatively strong association with ‘cities and large towns’, ‘scenic coastline and harbours’, ‘mountain adventure’ and ‘a touring vacation’. However, with only 21% stating they know Wales ‘very well’, associations are likely driven by perceptions or assumption of what they think Wales would be like rather than knowledge or experience.

Figure 37. Destination associations with Wales, Percentage, All respondents

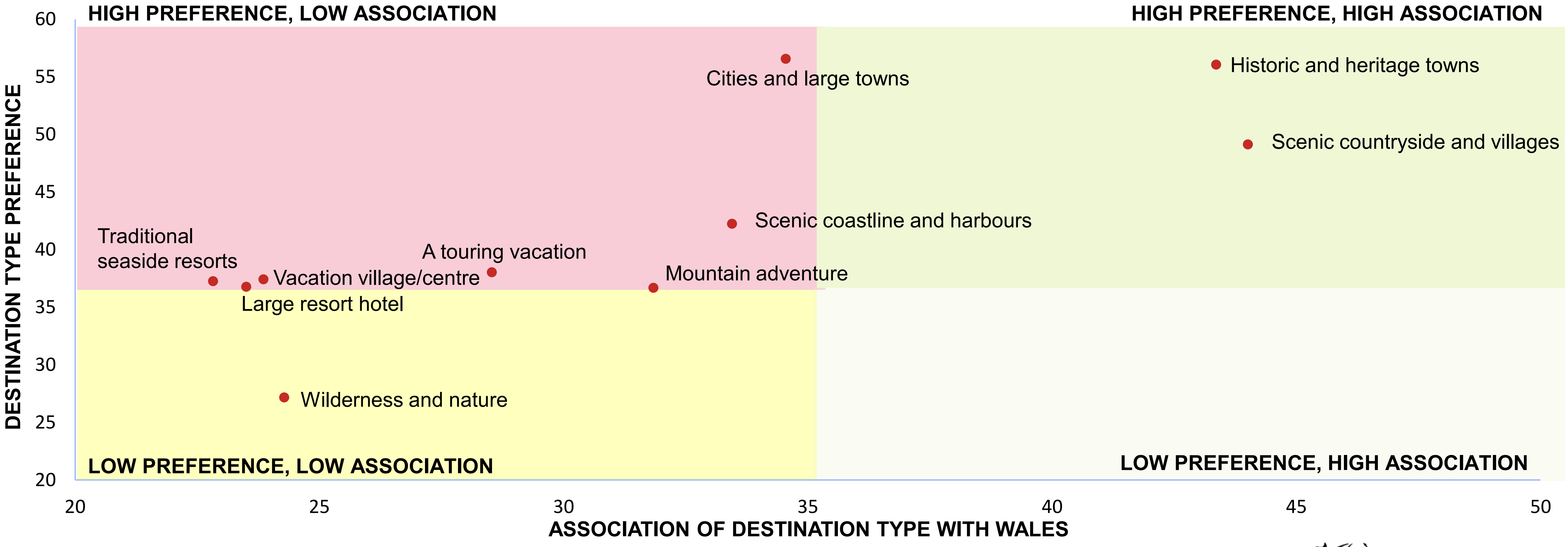


D1. Which, if any, of these places do you most associate with these destination types? All data weighted.
Base: All respondents n=1,000

Destination types associations against preferences

- Of the types of destinations the US vacation market show the most interest in, Wales has stronger associations with 'historic and heritage towns' and 'scenic countryside and villages'. Most other preferred destination types have weaker associations, such as 'cities and large towns' and 'scenic coastlines and harbours'.

Figure 38. Wales destination type association against destination type preference, Percentage, All respondents

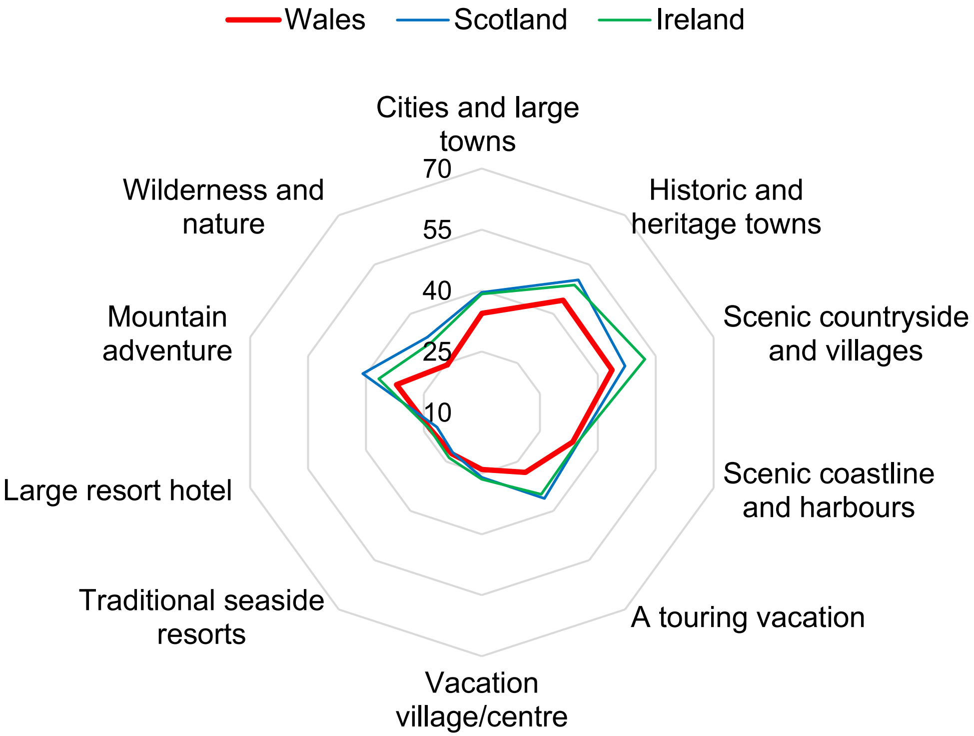


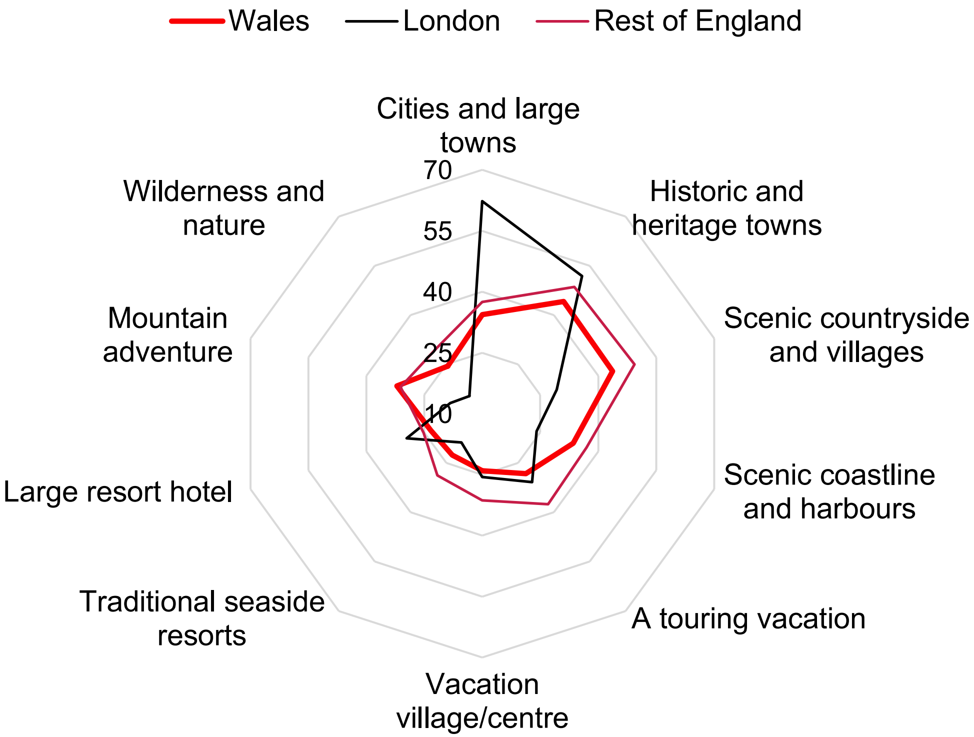
D1. Which, if any, of these places do you most associate with these destination types? B1. To which, if any, would you seriously consider taking a vacation in the UK in the next few years? All data weighted.
Base: All respondents considering each destination

Destination types associated with selected UK destinations

- Wales is associated with a range of destination types, but the relative strength of those associations is considerably weaker than for other destinations. For example, Wales has the weakest associations with ‘cities and large towns’, ‘historic and heritage towns’, ‘a touring vacation’ and ‘vacation village/centre’.
- Scotland and Ireland have a similar overall pattern of association to Wales, albeit scoring consistently higher. Wales also shares some similarities with the rest of England. Notably, London appears to be distinct from the other destinations – it is strongly associated with ‘cities and large towns’.

Figure 39. 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=1,000
*Ordered clockwise in order of importance to US market

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Destination influences associated with Wales

- In terms of destination influences, Wales has the strongest associations as ‘a destination rich in history and heritage’ and ‘incredible scenery and landscapes’, although there is minimal separation with a range of other influences.

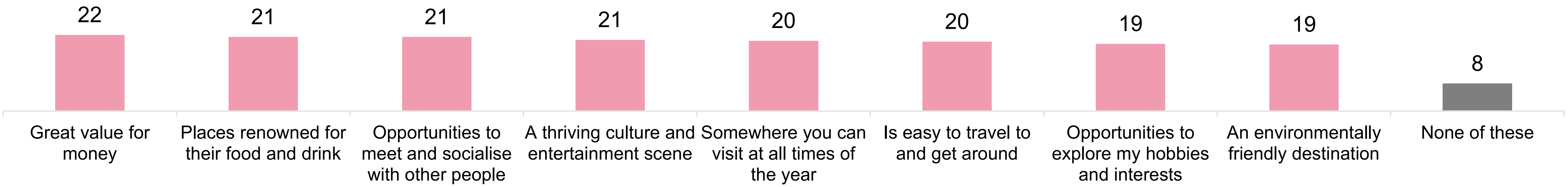
Figure 40. Destination influence associations with Wales, Percentage, Top 10, All respondents

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000

Destination influences associated with Wales

- Wales has the weakest associations with being ‘an environmentally friendly destination’ and ‘opportunities to explore my hobbies and interests’.
- However, it’s important to note that there is only a 14 percentage point difference between the weakest and strongest associations, suggesting that respondents may have limited knowledge of Wales and/or that the ‘image’ of Wales as a destination does not appear to stand out in any particular area among US respondents.

Figure 41. 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=1,000

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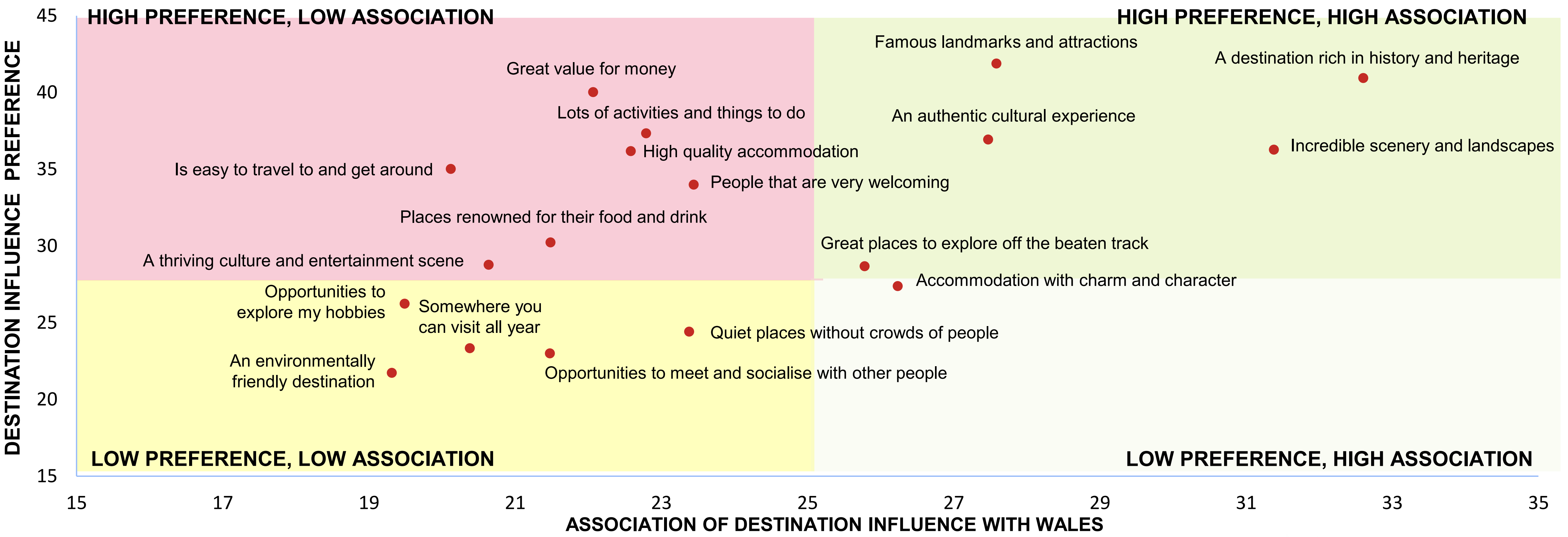
Destination influence associations against preferences

- Relative to the US market's preferences, Wales has stronger associations with influences related to history, culture and heritage, and the outdoors, as well as for having 'famous landmarks and attractions' and 'great places to explore off the beaten track'. However, most other associations are relatively weak, including associations with strongly preferred influences such as 'is easy to travel to and get around', 'great value for money', 'lots of things to do' and 'high quality accommodation'.

Figure 42. 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 vacations in the UK? All data weighted.
Base: All respondents n=1,000

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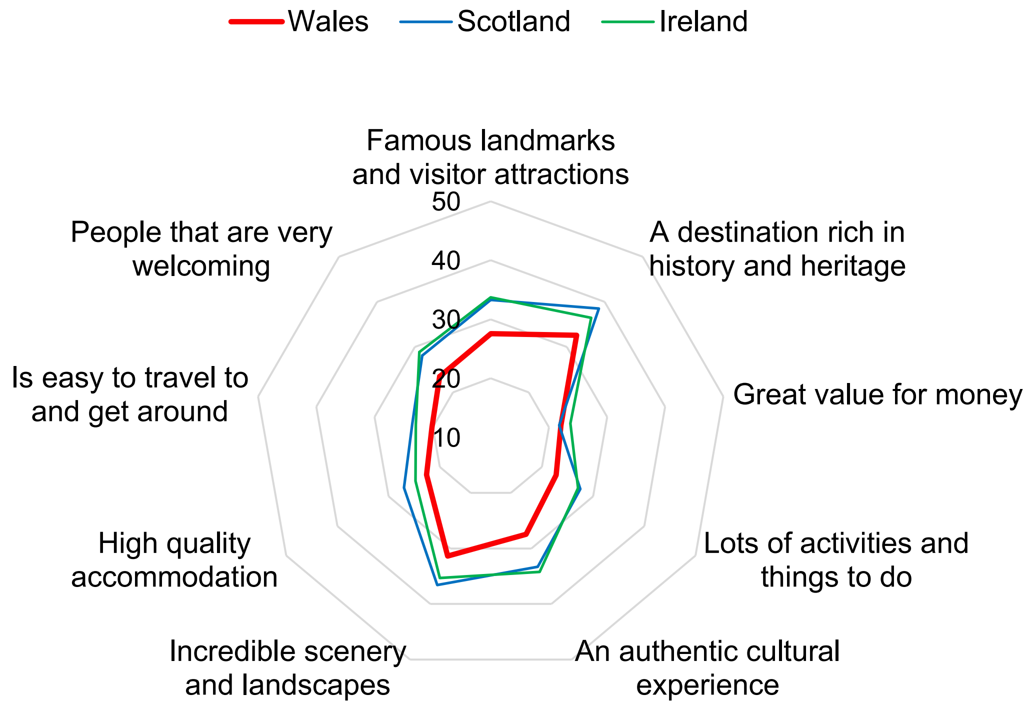
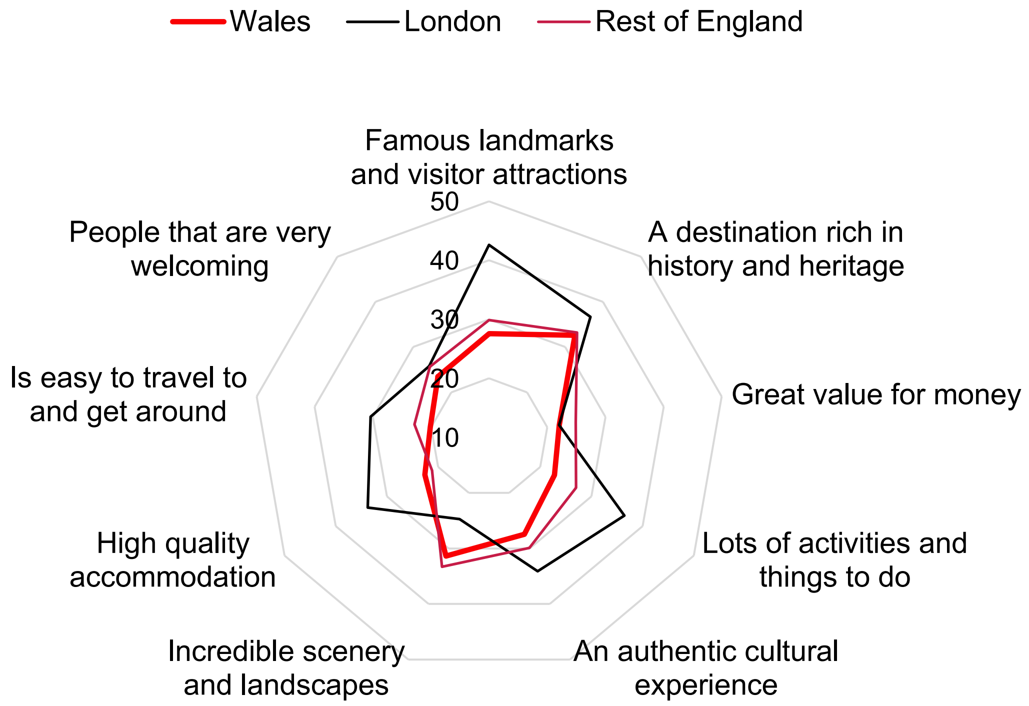
Destination associations – trip influences

- London dominates as a destination associated with ‘famous landmarks and visitor attractions’, ‘lots of activities and things to do’, ‘high quality accommodation’ and ‘is easy to travel to and get around’.
- Wales, Scotland, Ireland and the rest of England (outside of London) all share similar associations. However, Wales is behind Scotland and Ireland in almost all the trip influences. One exception to this is ‘great value for money’, an area where Wales has parity with other destinations, although associations are weak for all.

Figure 43. Destinations most strongly associated with each trip influence*, Top 9 in order of importance, All respondents



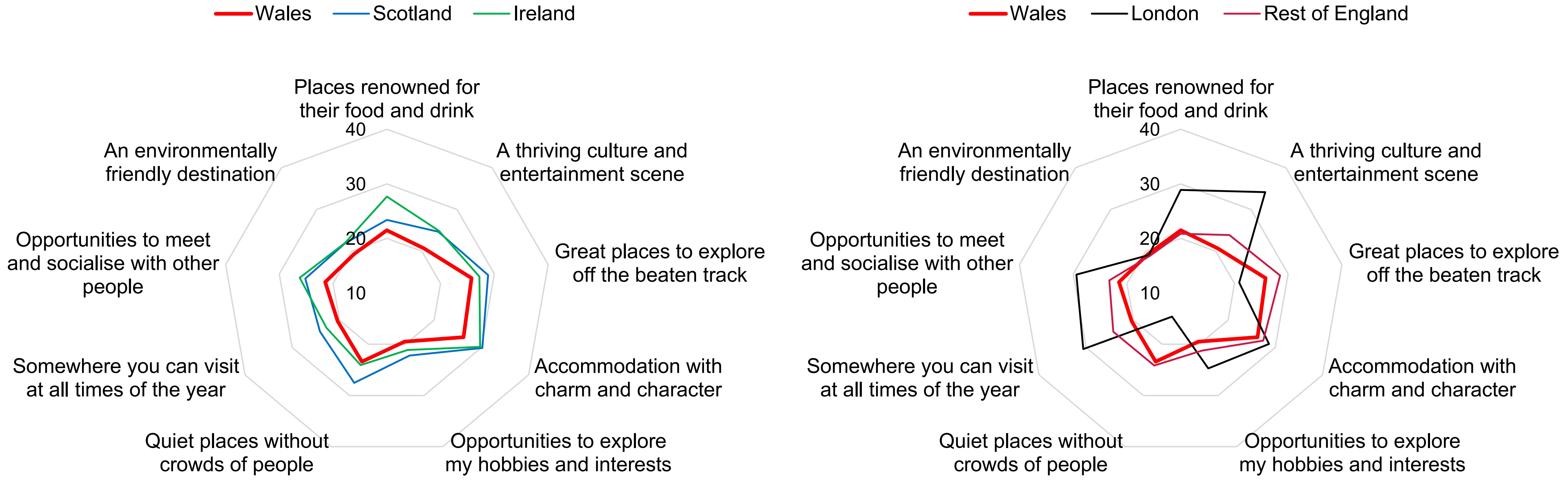


D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to US market

Destination associations – trip influences

- In relation to less popular influences, associations with London differ compared to associations with the other destinations. For example, while Wales, Scotland, Ireland and the rest of England (outside of London) have weaker associations with 'a thriving culture and entertainment scene' and 'somewhere you can visit at all times of the year', London is most strongly associated with these trip influences - over 30% reported associated London with these influences each.
- Wales remains predominantly outside of the top 3 for less popular influences except for 'an environmentally friendly destination'.

Figure 44. Destinations most strongly associated with each trip influence*, Bottom 9 in order of importance, All respondents

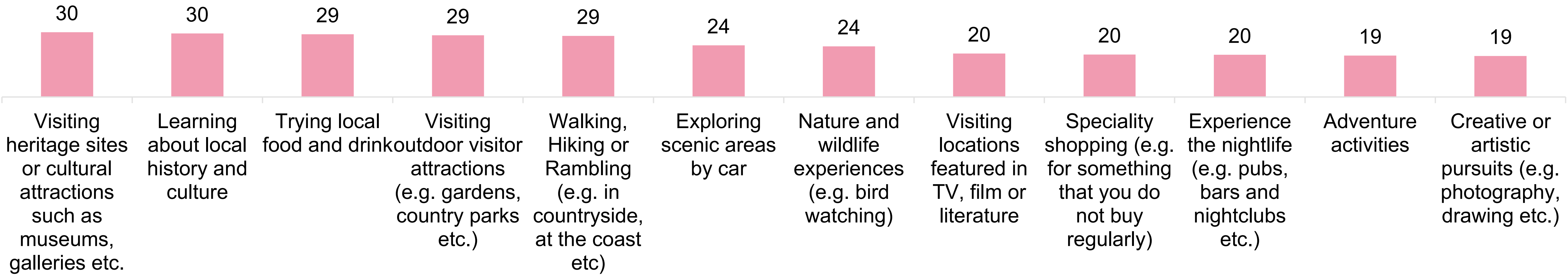


D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to US market

Experiences associated with Wales

- Regarding experiences, Wales is most strongly associated with ‘visiting heritage sites or cultural attractions’, ‘learning about local history and culture’, ‘trying local food and drink’, ‘visiting outdoor visitor attractions’, and ‘walking, hiking or rambling’ – with around 3 in 10 reporting that Wales is suited to each of these experiences. Wales also has stronger associations with ‘exploring scenic areas by car’ and ‘nature and wildlife experiences’, with just under 1 in 4 reporting an association for each.

Figure 45. 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 vacation experiences? All data weighted.
Base: All respondents n=1,000

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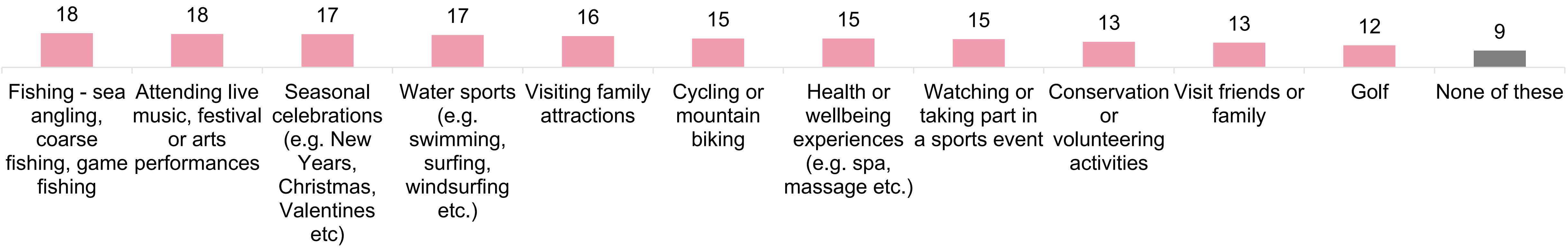
Experiences associated with Wales

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

Figure 46. Experience associations with Wales, Percentage, Bottom 11, All respondents

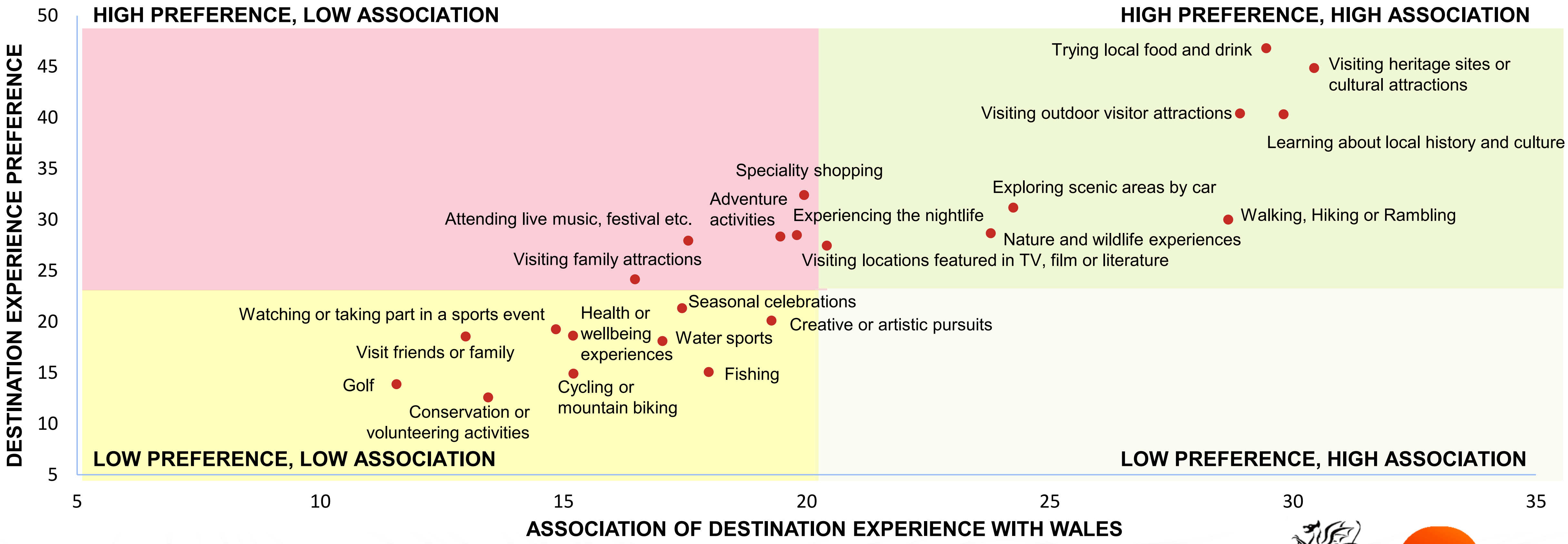


D3. And which, if any, of these places do you think are best suited to these vacation experiences? All data weighted.
Base: All respondents n=1,000

Destination experience associations against preferences

- Wales has generally stronger associations with the majority of destination experiences that are of higher importance to the US market, in particular those relating to history, culture, heritage and activities within nature. It has weaker associations with some activities that are important to the US market, such as 'speciality shopping', 'experiencing the nightlife' and 'attending live music'.

Figure 47. 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 vacation experiences? B3. And which, if any, of these types of experiences would you most like to do on a vacation in the UK in the next few years? All data weighted. Base: All respondents n=1,000

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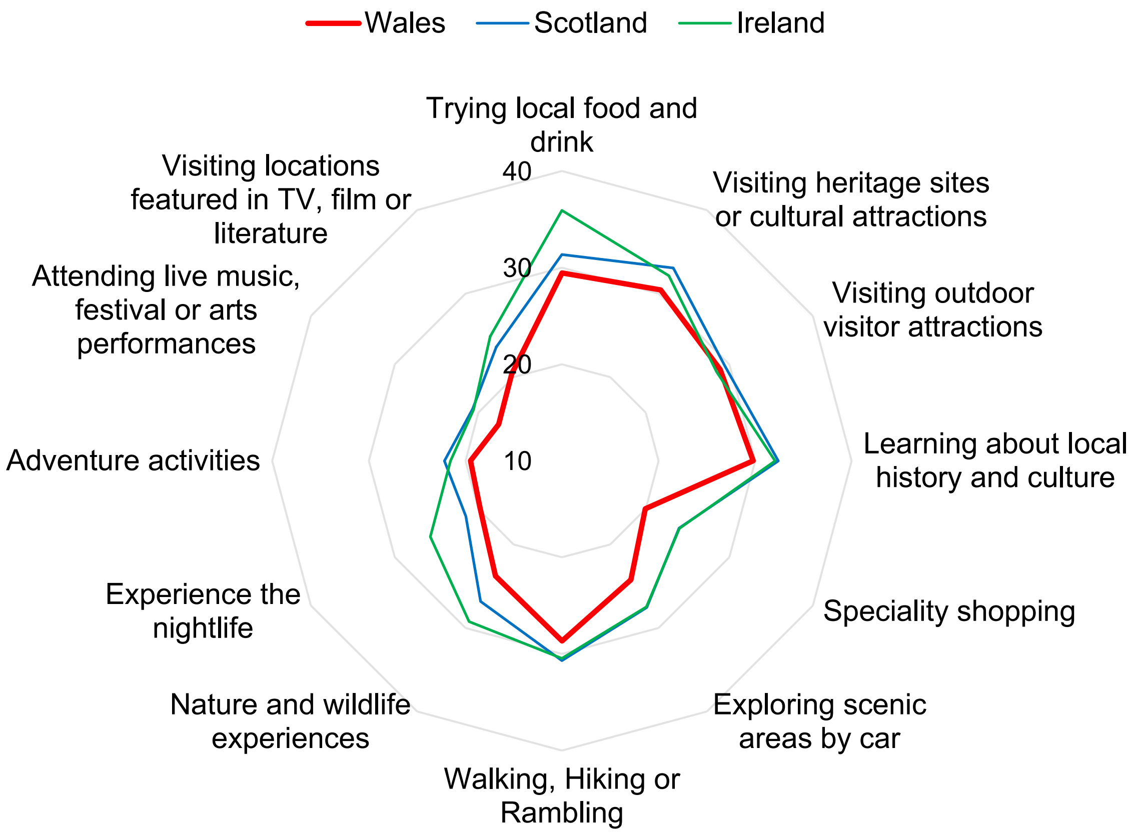
Destination associations – trip experiences

- Again, Wales is behind Scotland and Ireland in almost all trip experiences, despite sharing a similar pattern of associations. That said, its association with 'visiting outdoor visitor attractions' is on a par with Ireland.
- London is most strongly associated with 'visiting heritage sites or cultural attractions', 'speciality shopping', 'experience the nightlife', 'attending live music, festival or arts performances' and 'visiting locations featured in TV, film or literature'.

Figure 48. 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 vacation experiences? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to US market

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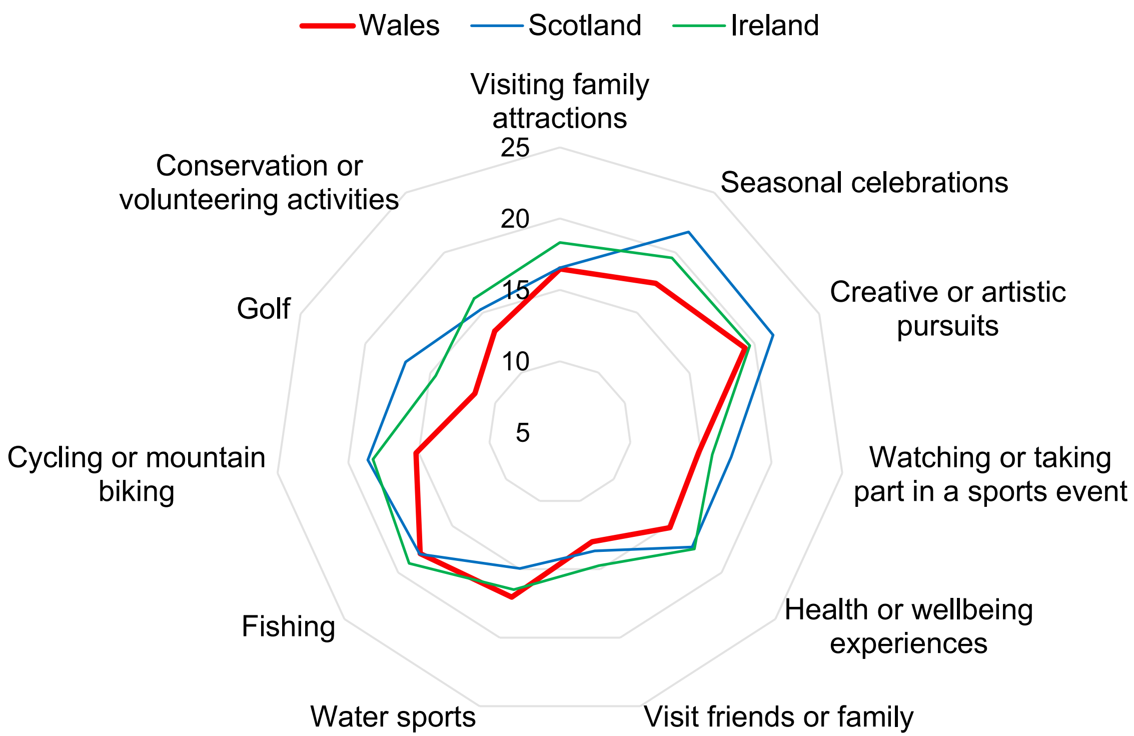
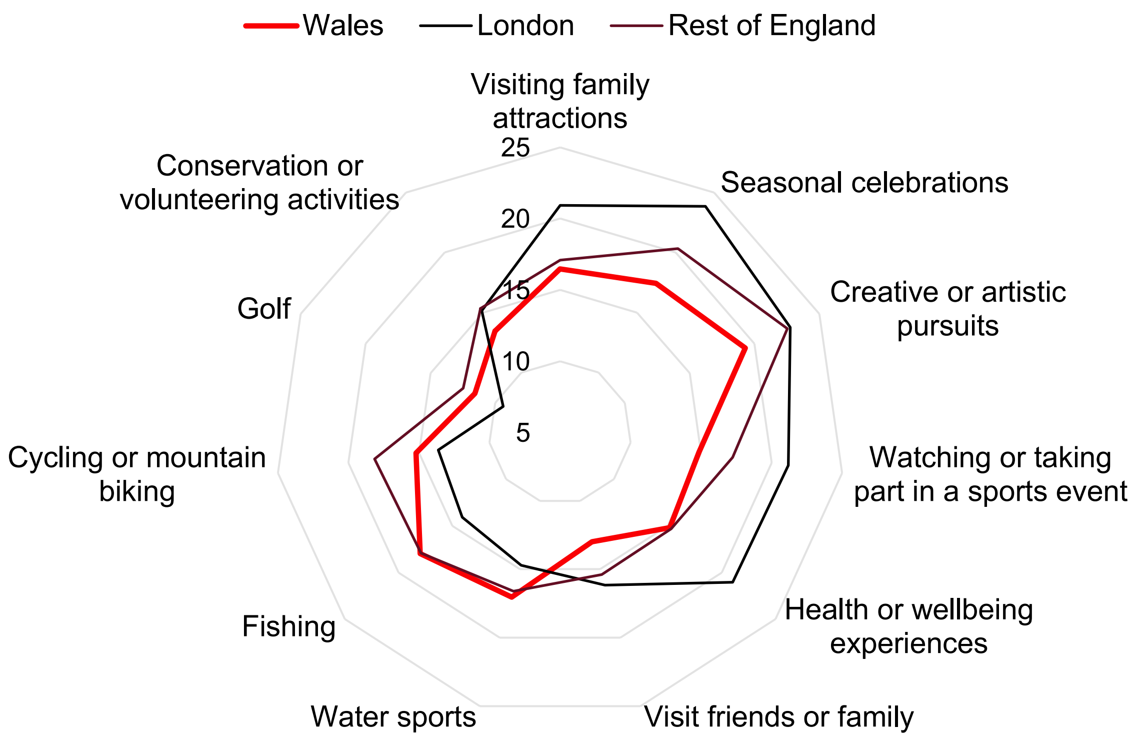
Destination associations – trip experiences

- London has stronger associations with experiences related to touring, event-based and relaxing activities such as 'visiting family attractions', 'seasonal celebrations', 'watching or taking part in a sports event' and 'health or wellbeing experiences', whilst other destinations have stronger associations with outdoor sports like water sports, fishing, cycling and golf.
- Wales has the strongest association with 'water sports', underlining its strong appeal as an outdoor destination.

Figure 49. 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 vacation experiences? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to US market

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Wales as a destination

- When asked to describe what is most appealing about Wales as a vacation destination without prompts, the majority of the US market did not name anything specifically. However, of those that could, the culture, scenery and history of Wales were the most prevalent. Notably, a fair proportion of respondents mentioned 'the people'.

Figure 50. Most appealing about Wales as a vacation destination, All respondents

Nothing in particular comes to mind	41%
Don't know/not sure	14%

E2b. What would you say is most appealing about Wales as a vacation destination?
Base: All respondents n=1,000

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Future visits to Wales

Trips intended to Wales in next few years

- 15% of the US market state they have already booked a vacation in Wales in the next few years. Just over a third (37%) are ‘very interested – but have not yet booked’. Although interest in visiting Wales is high, limited knowledge of Wales as a destination (as outlined on Slide 45) suggests that this may indicate broader interest in visiting the UK, rather than just Wales.
- 21% of that are interested in taking a Wales trip state they are planning on doing so in 2023, with the majority planning their trip from 2024 onwards – 31% in 2024, 34% in 2025 or later.

Figure 51. Wales trip intended in the next few years, Percentage, All respondents

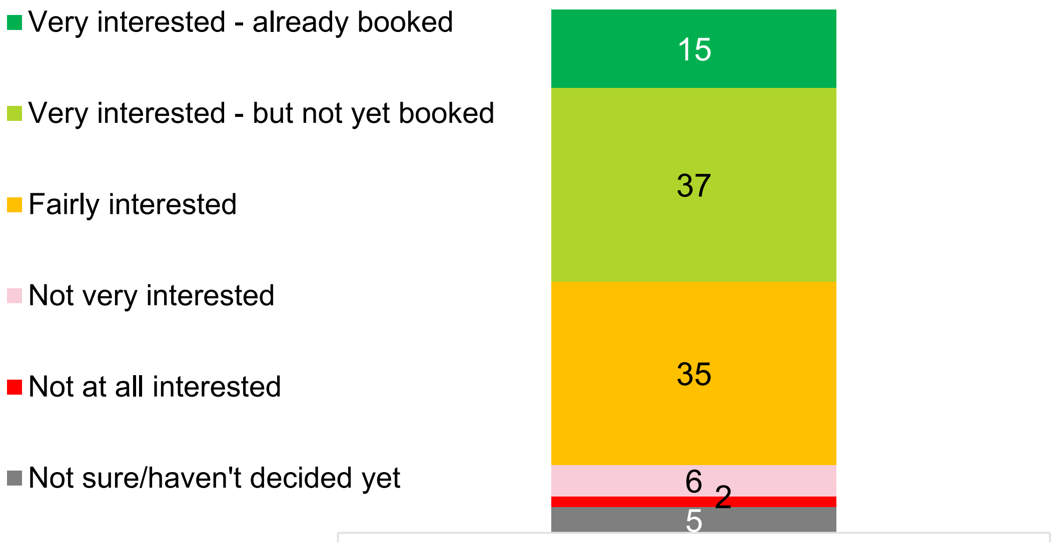
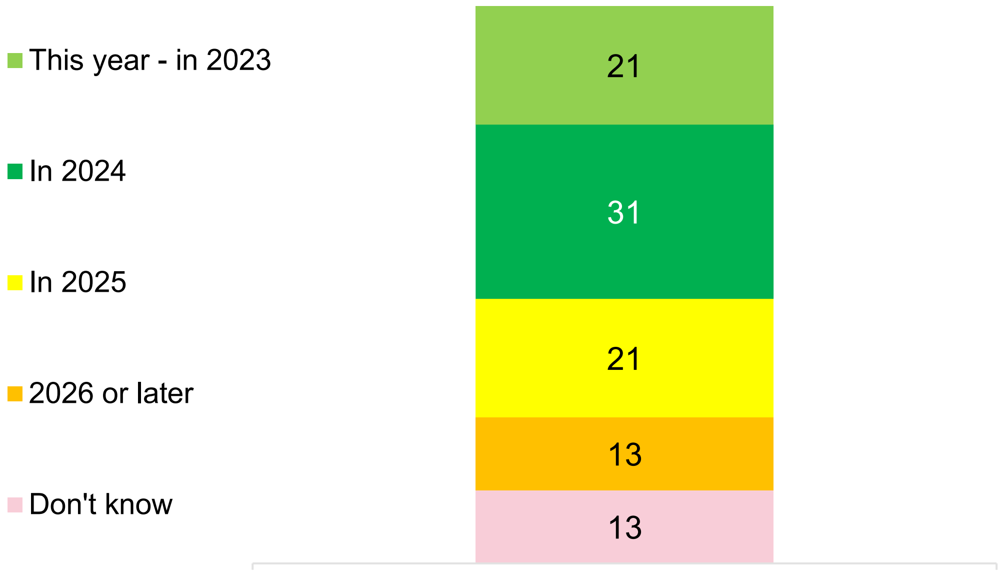


Figure 52. When planning to take a Wales trip in the next few years, Percentage, All Wales trip intenders



F1. How interested, if at all, would you be in taking a vacation in Wales in the next few years? F2. And when are you next most likely to visit Wales for a vacation? All data weighted.
Base: All respondents n=1,000. All Wales trip intenders n=858
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed bookings are exaggerated or misplaced

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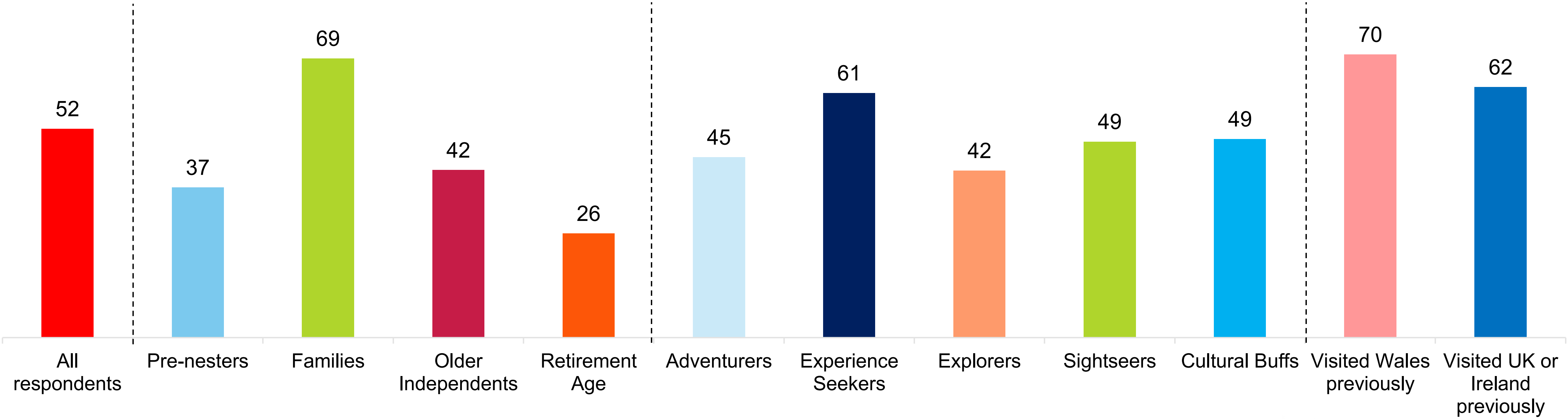
Trips intended to Wales in next few years – by life stage

- Families are the life stage most likely to be ‘very interested’ in taking a Wales vacation in the next few years – with more than two thirds (69%) intending to do so. Pre-nesters and older independents express similar interest in a future Wales trip – around 2 in 5 planning to do so. Only 26% of those that are of retirement age are ‘very interested’ in a Wales vacation in the next few years.
- Experience Seekers are the segment most likely to be ‘very interested’ in taking a Wales vacation in the next few years – with 61% intending to do so.
- Those that had visited Wales previously are considerably more likely to visit Wales than those that hadn’t – previous visitors to the UK or Ireland were also more likely to do so.

Figure 53. 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 vacation in Wales in the next few years? All data weighted. Base: All respondents n=1,000. Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88; Adventurers n=222; Experience Seekers n=368; Explorers n=106; Sightseers n=121; Cultural Buffs n=178; Visited Wales before n=396; Visited UK before n=626
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed bookings are exaggerated or misplaced

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Trip length and months intending to take a trip in Wales

- Anticipated overnight visits to Wales from the US market are at their highest between June and September. Although less appealing, off-peak trips do hold some appeal. There is some variation by life stage – older independents and retirees are most likely to visit in June, and very unlikely to visit in the winter months. Families display more year-round interest, with interest peaking in July. Pre-nesters have similar levels of interest in visiting between June and September.
- The majority (47%) of anticipated overnight trips to Wales are stays of 4-7 nights, although around a quarter (26%) anticipate a longer break of 8+ nights.

Figure 54. Months intending to take next trip in Wales, Percentage, All Wales trip intenders

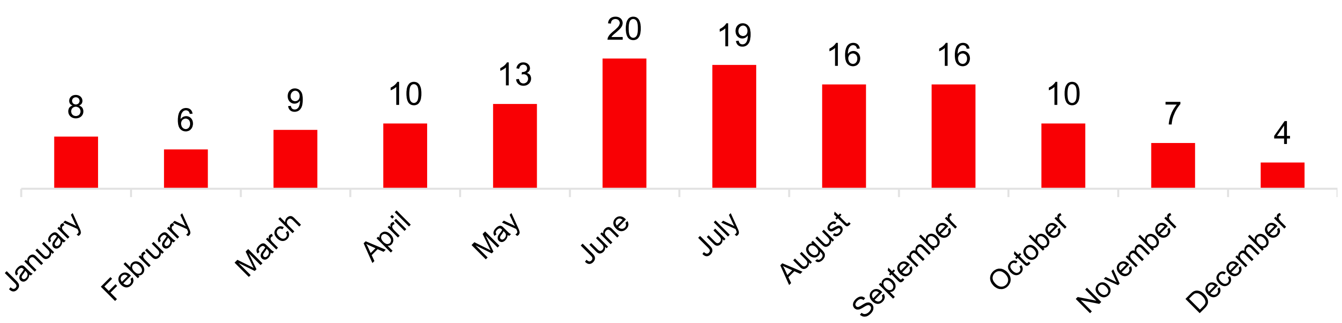
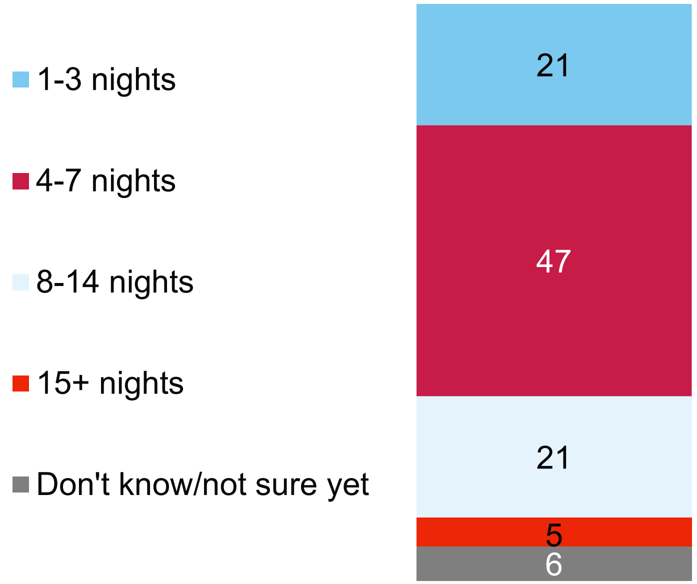


Figure 55. Trip length of next intended Wales trip, Percentage, All Wales trip intenders



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=858

Visitor party make-up for next Wales trip

- Over half (54%) of US trip intenders plan on visiting Wales with their partner, with 32% likely to do so with their children or grandchildren. Just under a quarter (22%) plan on travelling with friend/s.
- The majority (52%) of US visitors would expect to travel to Wales ‘independently’. Nearly a quarter (23%) anticipating travelling ‘as part of an escorted or organised tour with a travel company’, largely driven by families (23% of families are likely to do so). 16% would expect to travel as part of an organised group.

Figure 56. Visitor party make-up for next Wales trip, Percentage, All Wales trip intenders

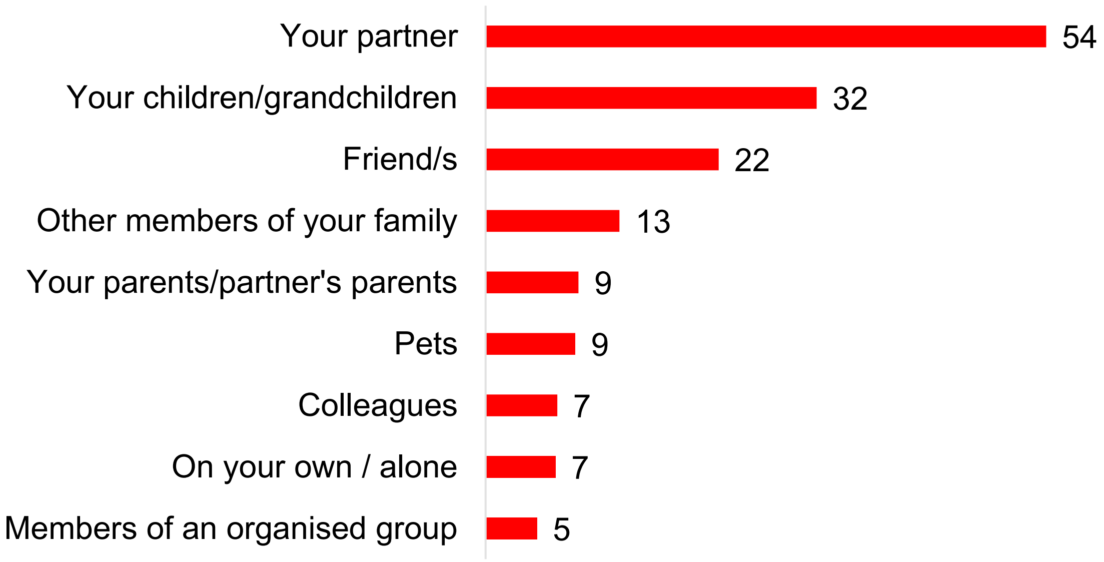
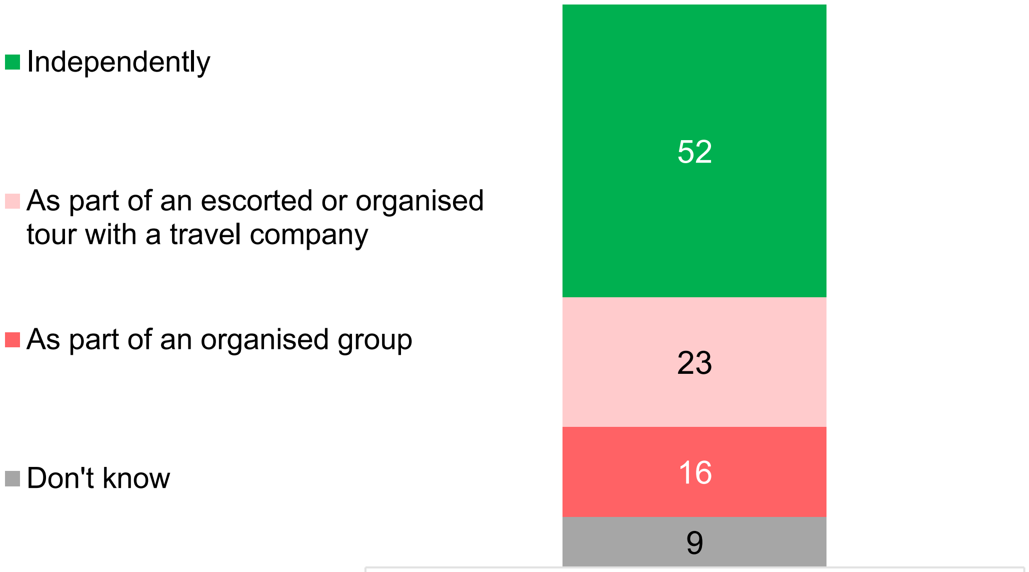


Figure 57. Likely company on your next overnight trip, Percentage, All Wales trip intenders



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=858

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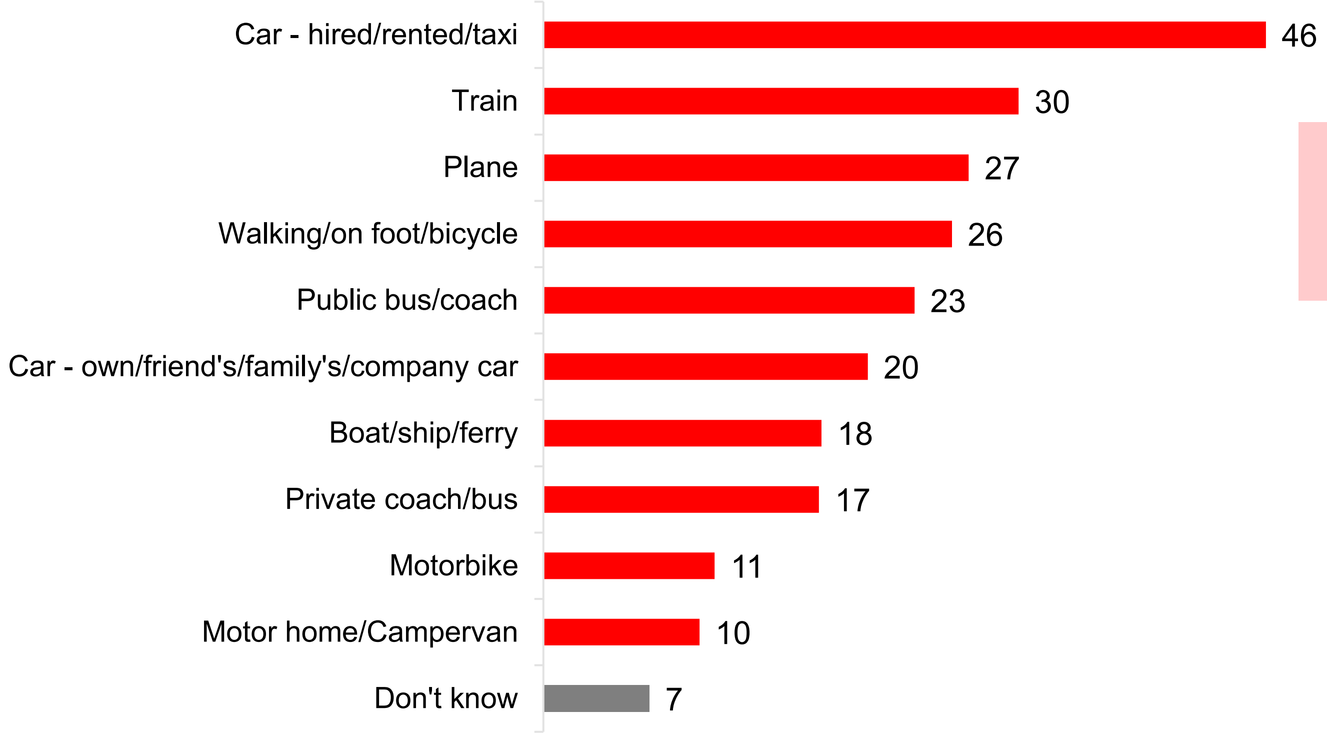
Intended ways to travel during next Wales trip

- Wales trip intenders from the USA are mostly likely to travel around Wales in a 'car – hired/rented/taxi' (46%) and 'train' (30%). Notably, over 1 in 4 (27%) plan on travelling around Wales by plane, perhaps further reflecting their limited awareness of Wales as a destination. Over 2 in 5 (43%) would anticipate using public transport (train or public bus/coach) 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 58. How travel around for next Wales trip, Percentage, All Wales trip intenders



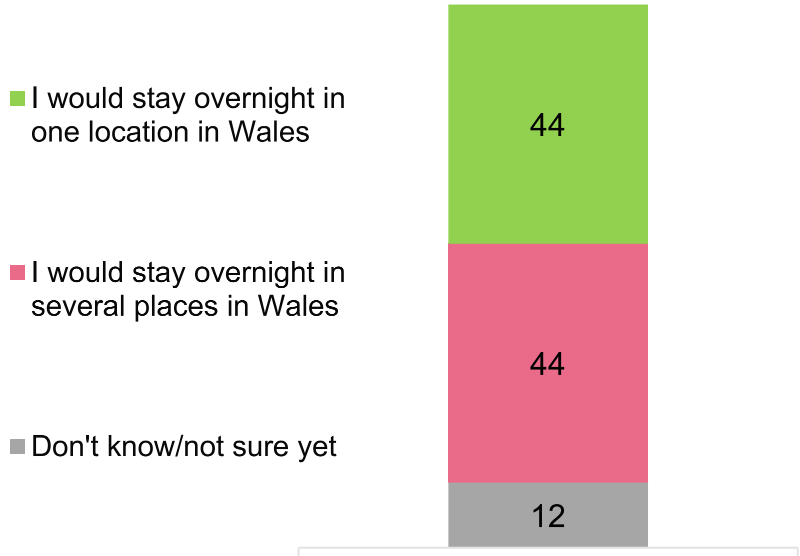
Net: Public transport 43%

F12. How are you most likely to travel around Wales on your visit? All data weighted.
Base: All Wales trip intenders n=858

Anticipated destination for next Wales trip

- North Wales is the region of Wales likely to attract the highest number of overnight visits from the US market (with 33% of potential trip-takers expecting to stay there there), although it is closely followed by Mid Wales (at 32%) and South West Wales (at 30%).
- Of those planning on staying overnight in Wales, 44% plan on staying in one Wales location on their trip and the same percentage would stay overnight in several places. Around 1 in 8 (12%) are unsure.
- Amongst life stages, families are more likely to stay overnight in one location in Wales, with 51% planning to do so.

Figure 59. 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=858

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Intent to visit elsewhere in UK or Ireland

- 71% of Wales trip intenders would stay elsewhere in the UK and Ireland as well as staying in Wales on their trip – equally split between doing so before and after visiting Wales (41% before vs. 42% after). The majority (74%) of these individuals intend to stay in London.

Figure 60. Intention to visit elsewhere in UK or Ireland as part of the same trip, Percentage, All Wales trip intenders

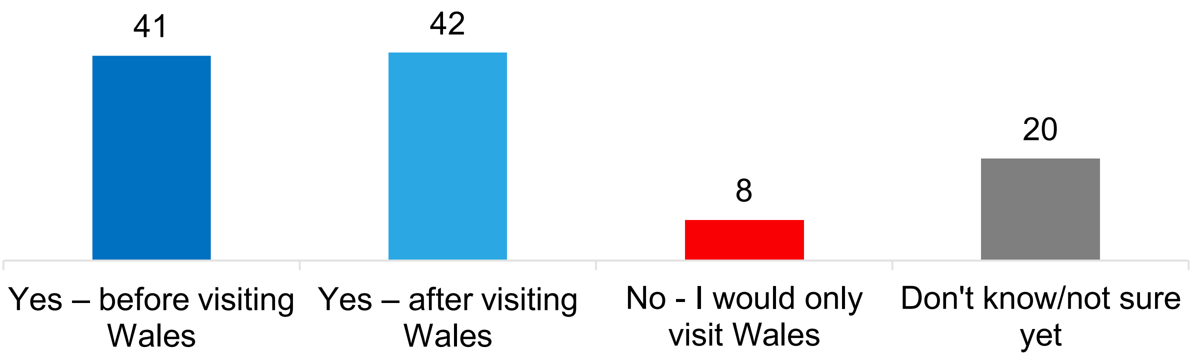
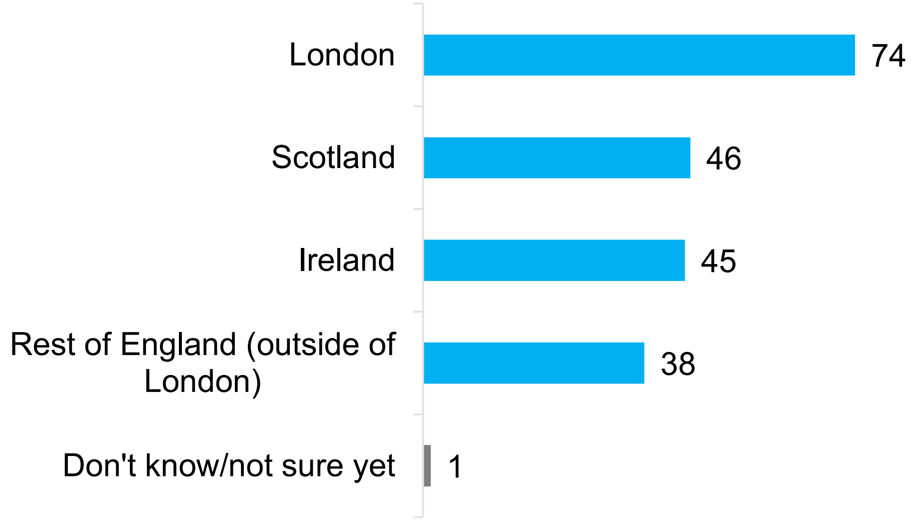


Figure 61. Where else intended to stay in UK or Ireland, Percentage, All Wales trip intenders anticipated to stay elsewhere



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=858; All planning to stay elsewhere in the UK n=606

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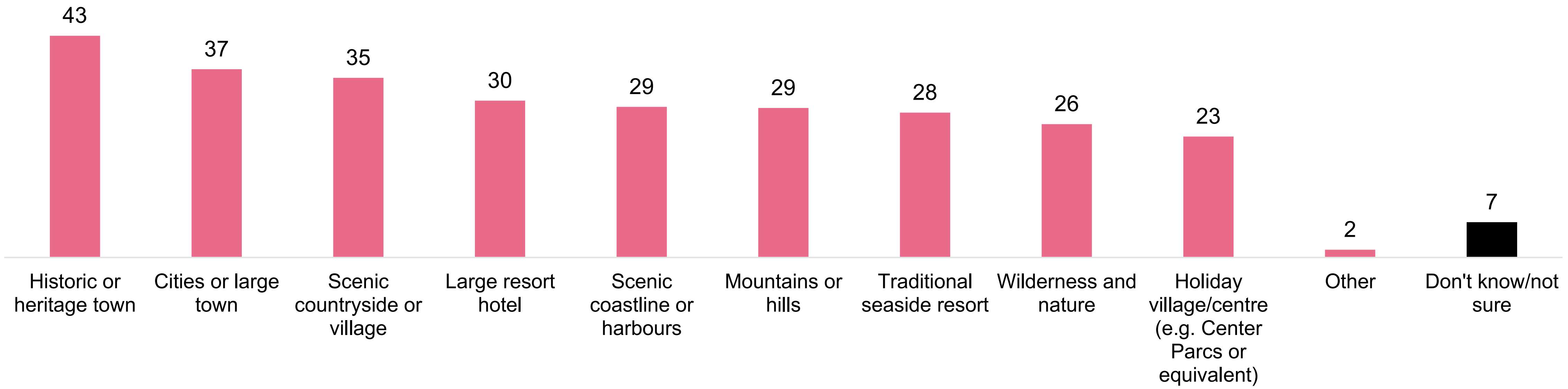
Destination preference for next Wales trip

- The most popular destination type that Wales intenders plan on staying in is a ‘historic or heritage town’ (43%), followed by ‘cities or large town’ (37%) and ‘scenic countryside or village’ (35%). Interest is also strong for other destination types, but this is likely to reflect general UK trip aspirations and limited knowledge of Wales, rather than developed plans on a visit.
- Aligned with general preference on destination type for a UK vacation among the US vacation market, retirees are more likely to favour staying in a ‘historic or heritage town’ and ‘scenic countryside or village’. Families index higher for ‘large resort hotel’, ‘mountains or hills’ and ‘wilderness and nature’.

Figure 62. Type of destination of those intending to take a trip in Wales, Percentage, All Wales trip Intenders

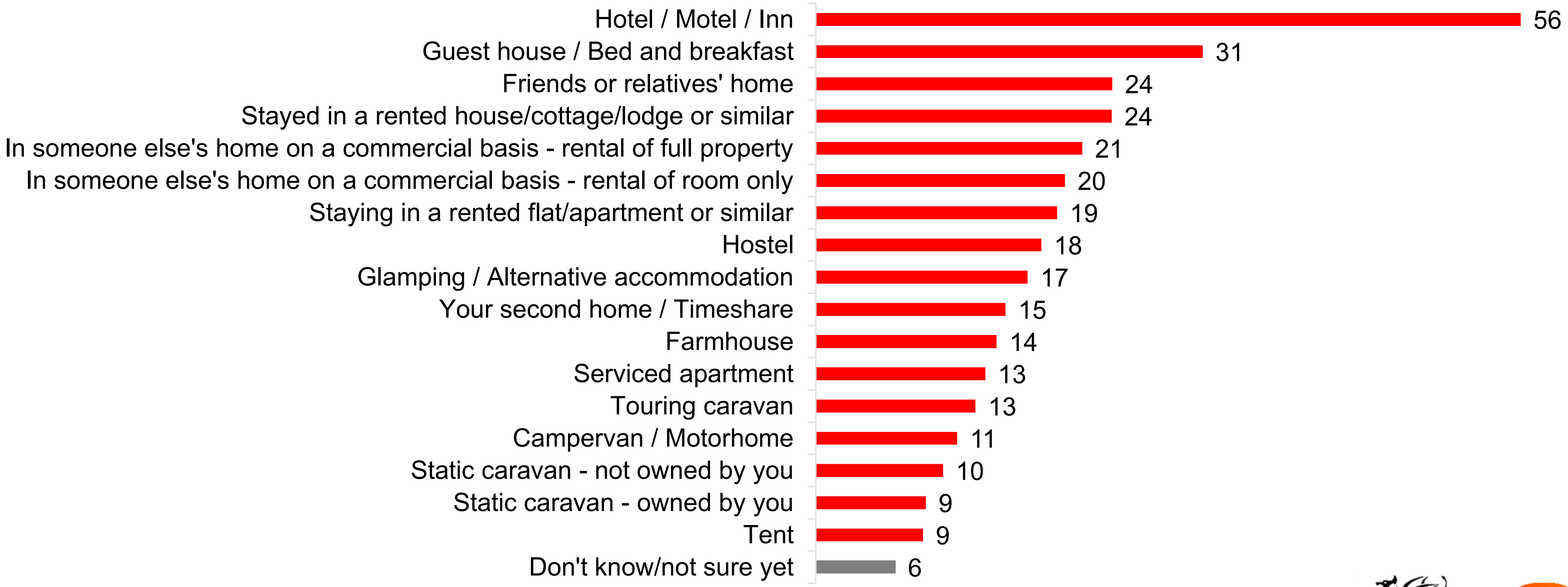


F8. Which of the following best describes the main types of destination you are likely to stay in during your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=858

Accommodation planning to stay in during next Wales trip

- ‘Hotels or motels’ are the most likely accommodation amongst Wales trip intenders (56% planning on staying in this category) followed by ‘guest house/B&B’ (at 31%). A range of other accommodation types were also chosen, including ‘friends or relatives’ home’ (24%), ‘rented house/cottage/lodge’ (24%) and ‘rental of full property in someone else’s home’ (21%).
- Pre-nesters are more likely than any of the other life stages to stay in a serviced apartment, whilst families are more likely to stay with friends or relatives and retirees are more likely to stay in a hotel, motel or inn.

Figure 63. 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=858

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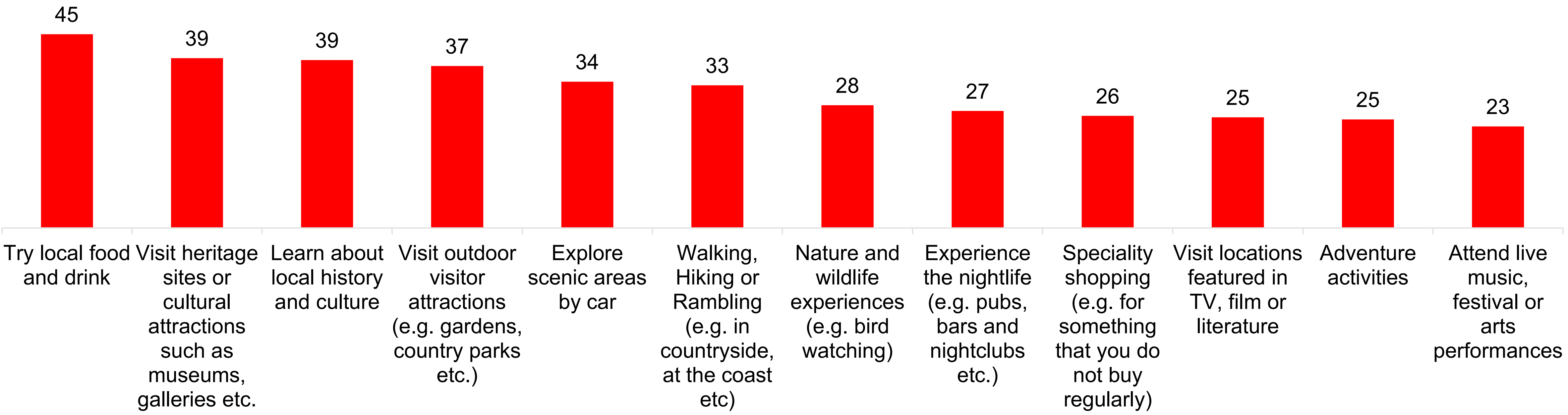
Activities likely on NEXT Wales trip

- Aligned with destinations and experiences preferred generally by the US vacation market for a UK vacation, 'trying local food and drink', 'visiting heritage sites or cultural attractions' and 'learning about local history and culture' are the leading activities likely to be undertaken by future US visitors to Wales, driven by older independents and retirees. 'Visiting outdoor visitor attractions', 'exploring scenic areas by car' and 'walking, hiking or rambling' are also popular potential activities. Again, anticipated activities on a trip to Wales likely indicate general aspirations for a UK trip, rather than developed plans for a Wales trip.

Figure 64. 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=858

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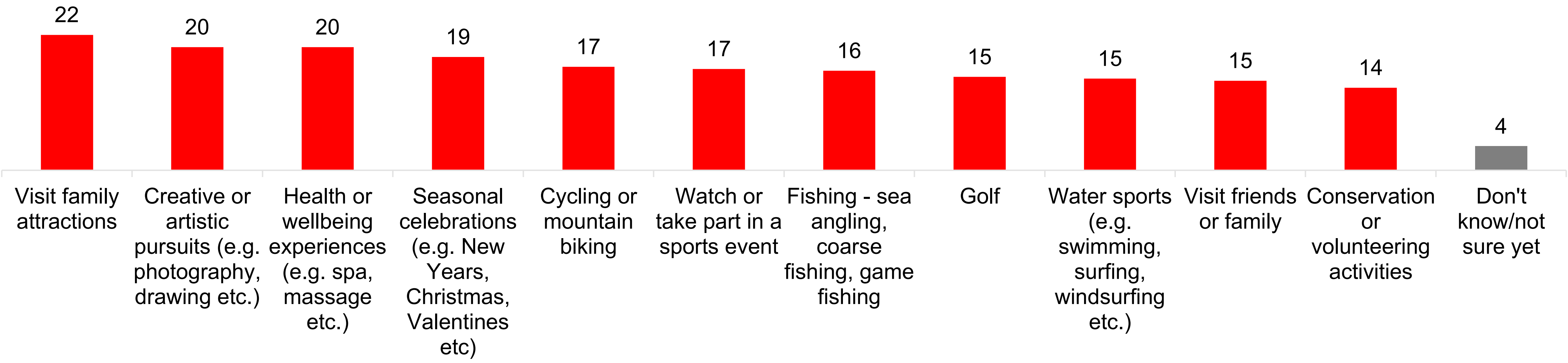
Activities likely on NEXT Wales trip

- A number of other activities appeal to the US vacation market when visiting Wales, albeit at a more niche level. Examples include 'visiting family attractions', 'creative or artistic pursuits' and 'health or wellbeing experiences'. 'Golf', 'water sports', 'visiting friends or family' and 'conservation and volunteering' are the least likely activities for future overnight trips to Wales, although there is interest from around 1 in 7.

Figure 65. Bottom 11 activities of those intending to take a trip in Wales, Percentage, All Wales trip Intenders

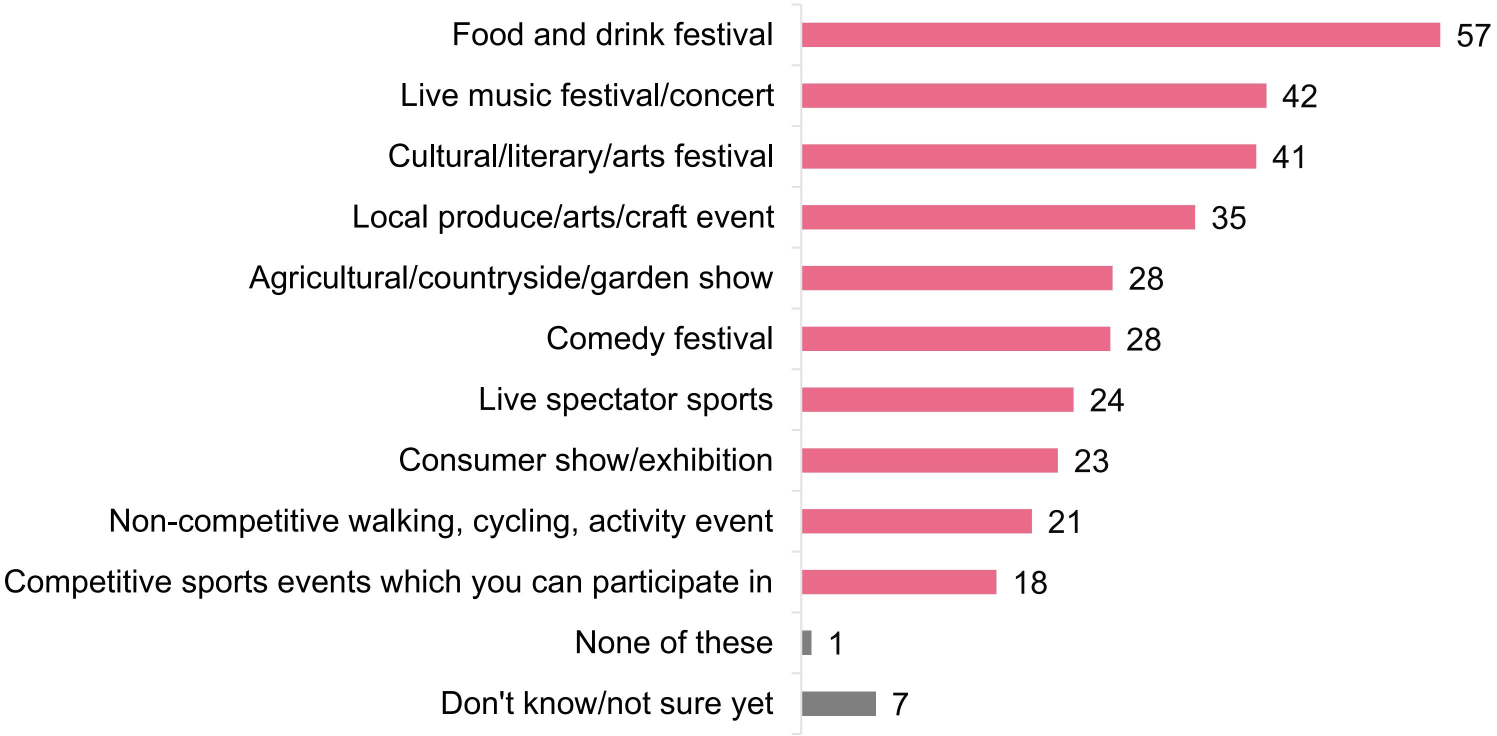


F10. Which, if any, of these activities are you likely to do on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=858

Interest in attending festivals or events in Wales

- There is strong general interest in festivals/events in Wales amongst intenders from the US market. Intenders are most likely to report that they would be very interested in attending a ‘food and drink festival’ (at 57%). Just over 2 in 5 are also interested in a ‘live music festival/concert’ and ‘cultural/literary/arts festival’.

Figure 66. Interest in festivals/events of those intending to take a trip in Wales, Percentage, All Wales trip Intenders



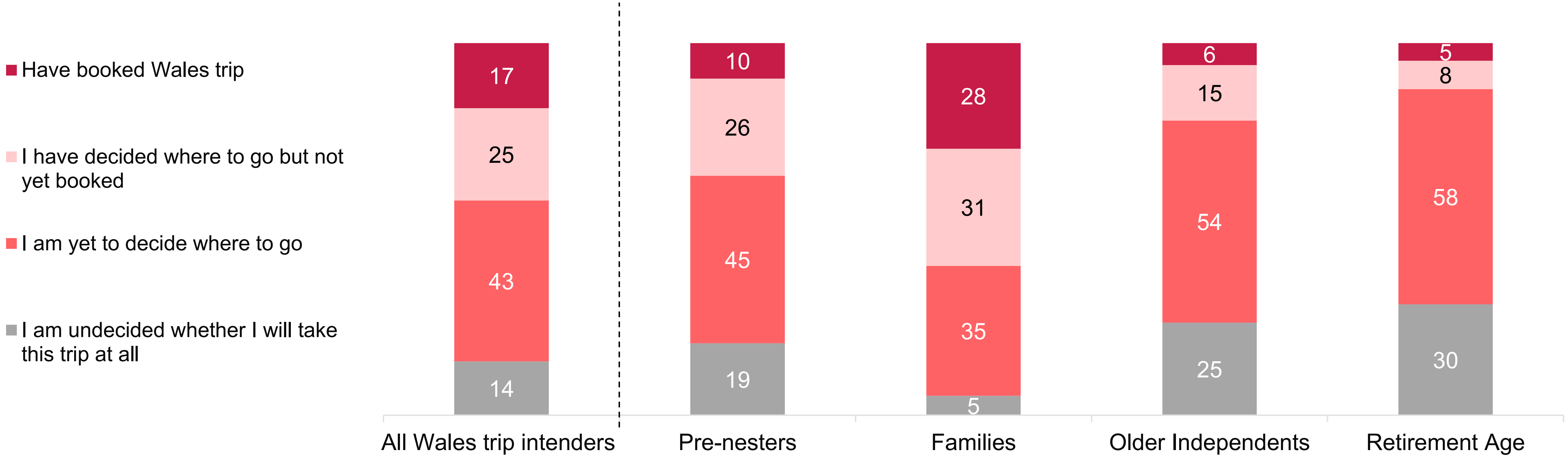
F11. How, if any, of the below types of festivals or events would you be very interested in attending whilst on your next overnight trip to Wales? All data weighted.
Base: All Wales trip intenders n=858

Future planning and booking to Wales

Booking status of next Wales trip

- 1 in 4 of the US vacation 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 43% 'yet to decide where to go'. Bookings are relatively high (at 17%) although this proportion also likely includes people who have booked a trip to the UK, but may not have booked a stay in Wales.
- Families are most likely to have already decided where they will go. Older independents and retirees are the least likely to have decided where to go.

Figure 67. 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=170; Families n=403; Older Independents n=220; Retirees n=65
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed bookings are exaggerated or misplaced

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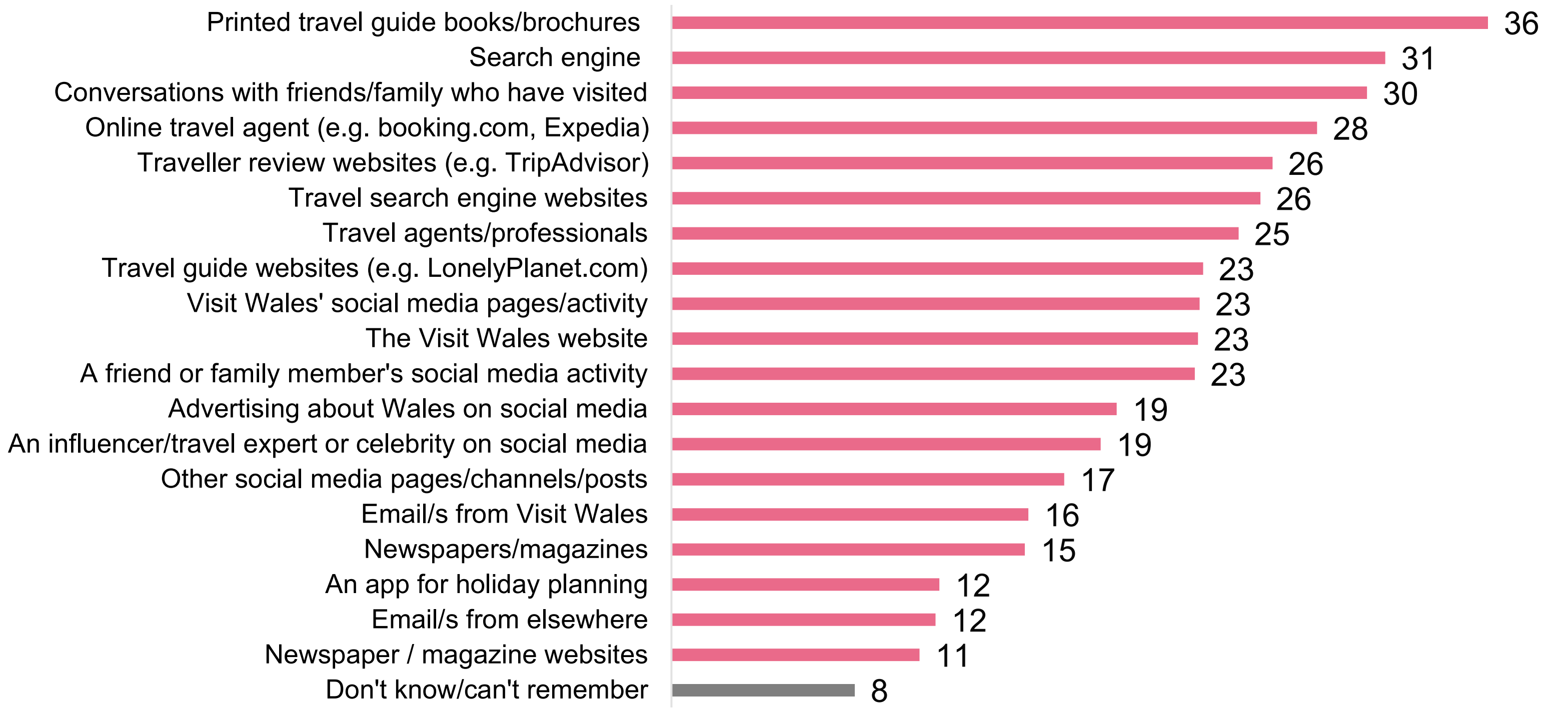
Sources of information to use when taking a trip in Wales

- Trip-takers to Wales are likely to use a range of sources to plan their next trip/s – ‘printed travel guide books/brochures’, ‘search engines’ and ‘conversations with friends/family who have visited’ the main influences. Notably, just under 1 in 4 would anticipate using the Visit Wales website.
- ‘Printed travel guide books/brochures’ is a popular information source across all life stages. ‘The Visit Wales website’ is more popular among retirees.

Figure 68. 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=858

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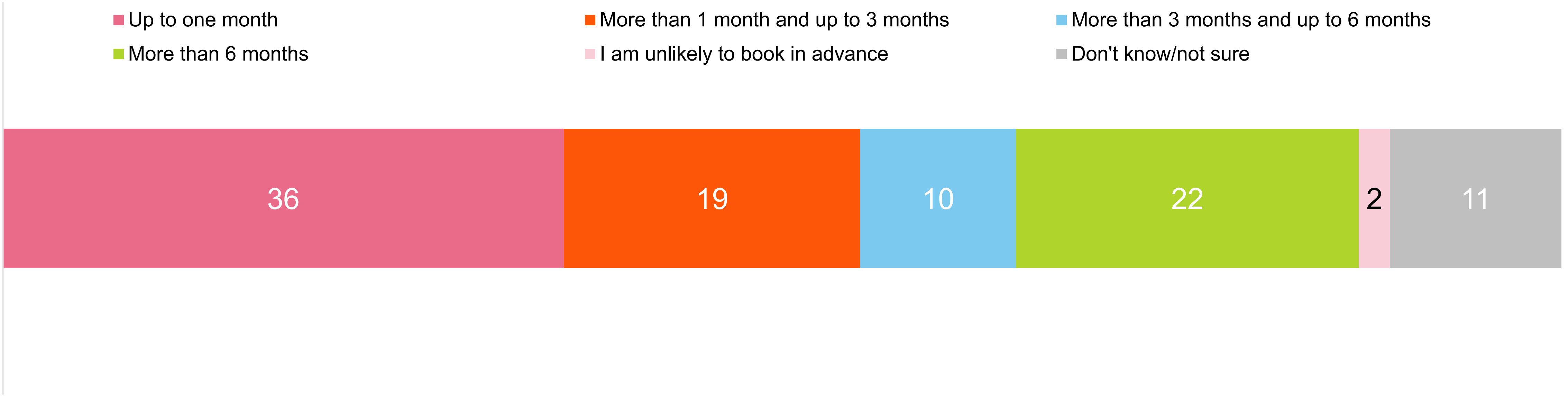
Time period between booking next Wales trip and the first day of trip

- 36% of US intenders anticipate booking their next Wales trip within 1 month of the travel date, with 1 in 5 (19%) expecting to do so 1 to 3 months before the travel date. Nearly 1 in 4 would anticipate booking their trip over 6 months in advance of taking it.
- Longer lead times are more prevalent amongst older life stages – nearly half of retiree intenders would expect to book their Wales trip more than 6 months in advance, compared to just 1 in 7 families.

Figure 69. 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=858

Wales trip booking behaviour

- 7 in 10 of Wales trip intenders from the US will book at least some of the elements of their trip separately – driven largely by families and pre-nesters. Only 18% will book most or all elements as one package and this is driven by older independents.
- Trips to Wales are most likely to be booked via an ‘online travel agent or tour operator’ (16%) and ‘price comparison sites’ (16%).

Figure 70. Ways to book the main elements of next Wales trip, Percentage, All Wales trip intenders

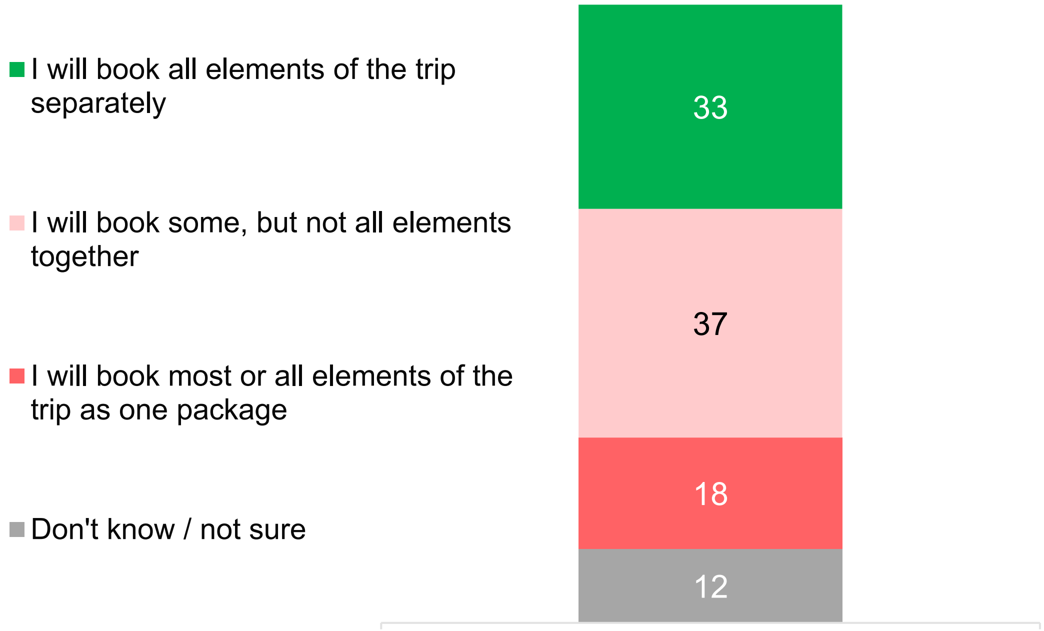
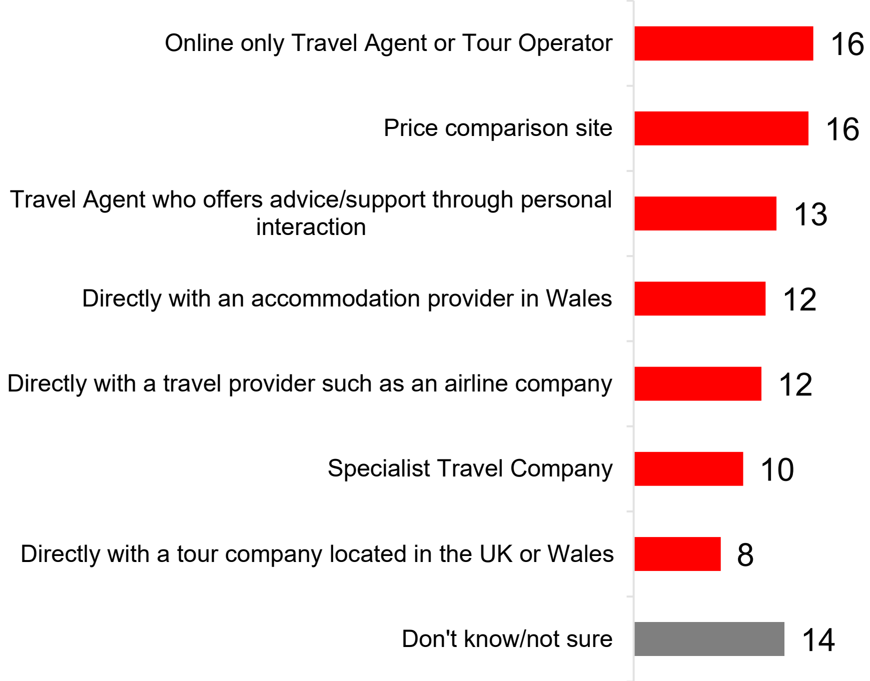


Figure 71. Booking channel for next Wales trip, Percentage, All Wales trip intenders



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=858

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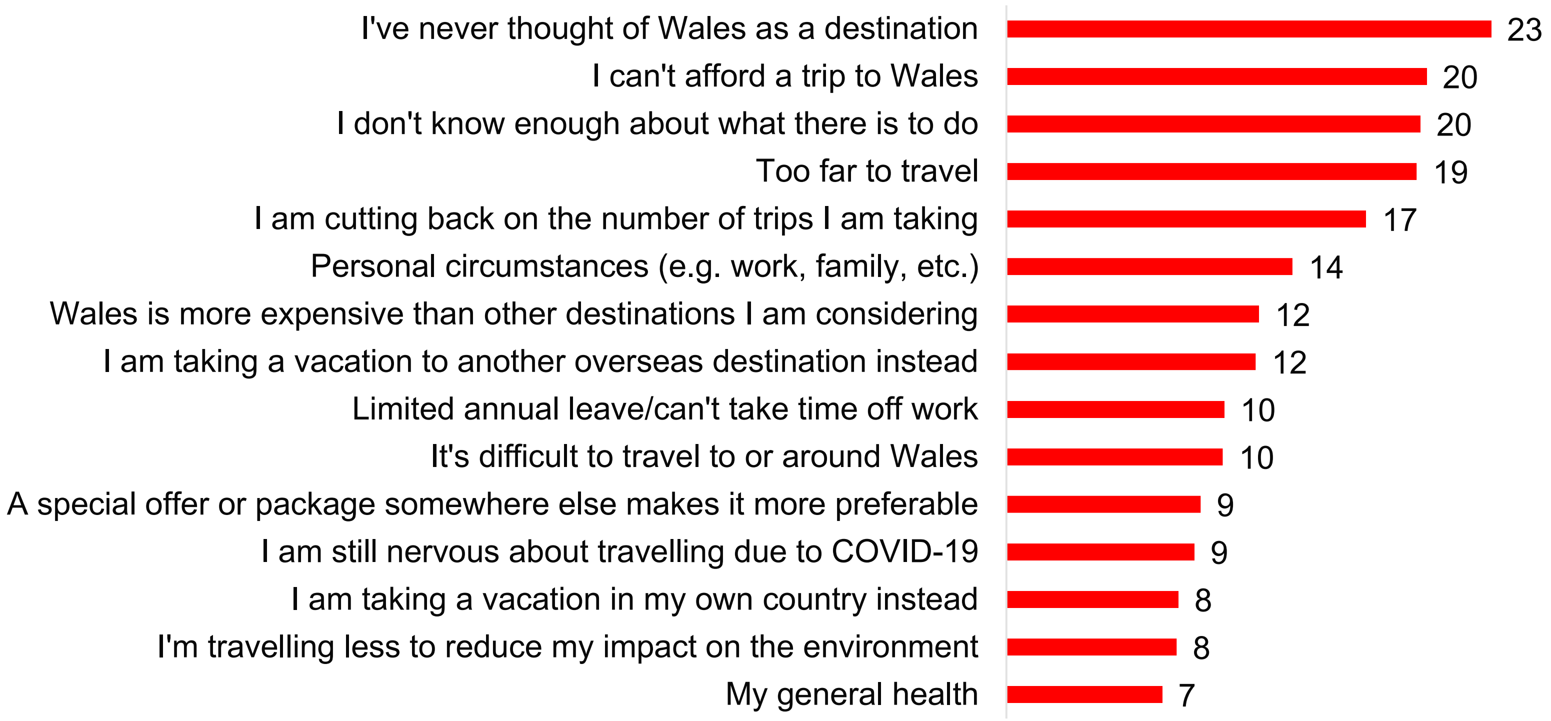
Non-intenders to Wales

Reason for not visiting Wales in the next few years

- Lack of awareness and knowledge of Wales are key drivers for not planning to visit Wales for a vacation in the next few years – 'I've never thought of Wales as a destination' (23%) and 'I don't know enough about what there is to do in Wales (20%) are the 1st and 3rd most commonly reported reasons, respectively. Finances are also a barrier, with 'I can't afford a trip to Wales' (20%) appearing as the 2nd most cited reason and 'Wales is more expensive than other destinations' (12%) the 7th most cited.

Figure 72. Top 15 reasons for not visiting Wales for a vacation 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 vacation in the next few years? All data weighted.
Base: All Wales non-intenders n=137

Other destination considerations amongst non-visitors to Wales

- Of the people who stated they are not intending to visit Wales in the next few years, 50% are seriously considering a vacation to London, with a further 1 in 3 considering Ireland.
- 17% of those not intending to visit Wales in the next few years state that they are 'very' or 'fairly' likely to take a day trip to Wales when on a vacation elsewhere in the UK in the next few years.

Figure 73. Other destination visiting intentions by non-visitors to Wales, Percentage, All non-intenders to Wales

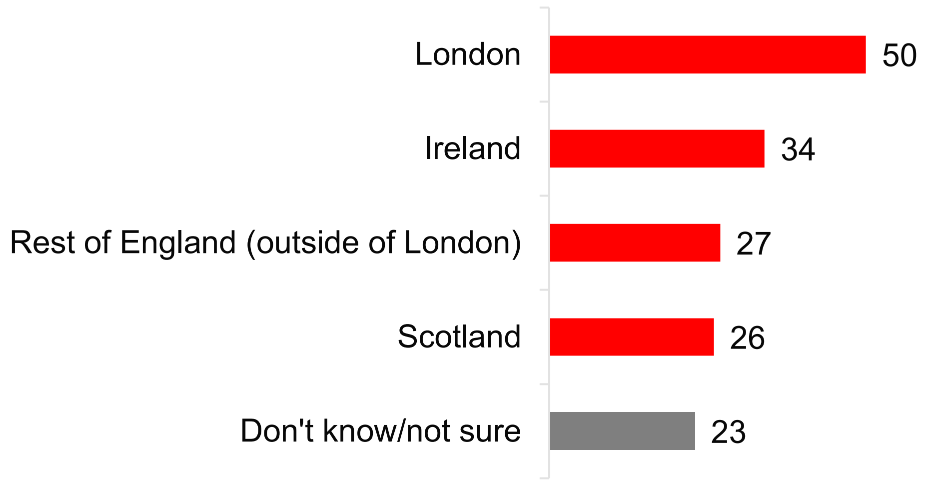
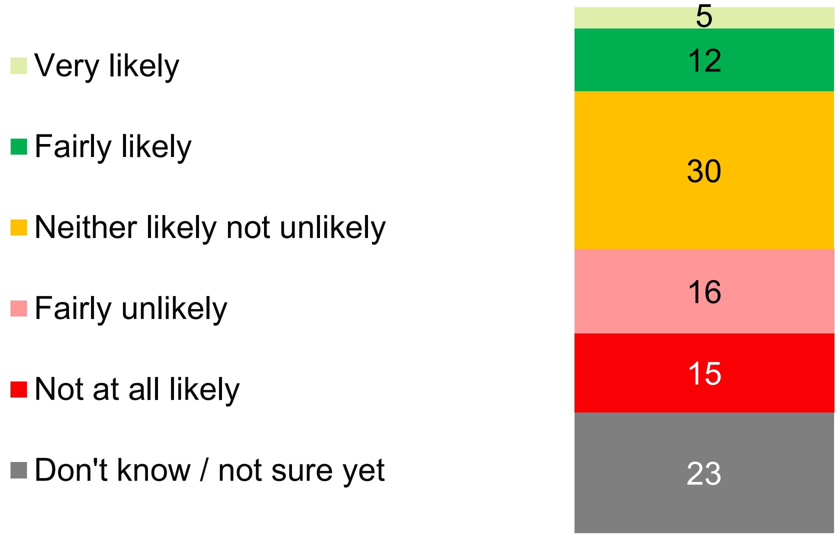


Figure 74. Wales day trip visiting intentions by non-visitors to Wales, Percentage, All non-intenders to Wales



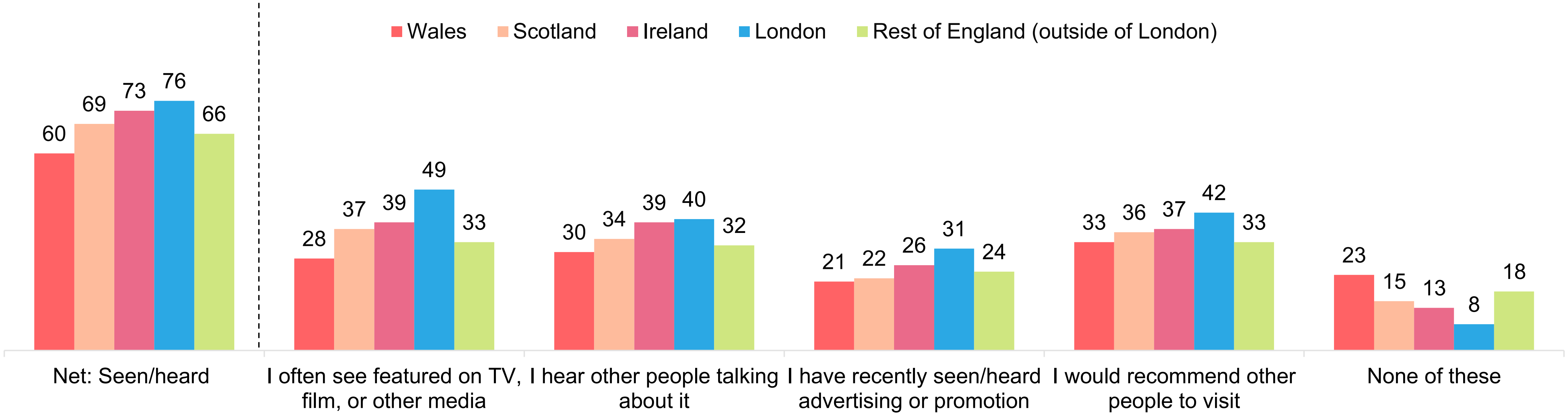
F20. Where, if anywhere, in the UK and Ireland are you seriously considering visiting for a vacation in the next few years? F21. How likely are you to visit Wales for a day trip when on a vacation elsewhere in the UK in the next few years? All data weighted. Base: All Wales non-intenders n=137

Marketing impact

Ways in which seen/heard about Wales and other destinations

- 3 in 5 of the US vacation market claim to see or hear Wales featured in the media, being talked about by others or to have recently seen/heard advertising or promotion about it. However, given the US market's limited ability to name places within Wales (see Slide 45), these results may simply reflect the ways in which they have seen or heard communications about the UK, rather than Wales specifically.
- All other competitor destinations have been seen or heard about by more of the US vacation market than Wales, although for some sources of information, the proportion of those who have heard about Wales is similar to those who have heard about the rest of England.
- Those who are 'very interested' in visiting Wales are more likely to have seen or heard about Wales.

Figure 75. 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=1,000
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed recall is exaggerated or misplaced

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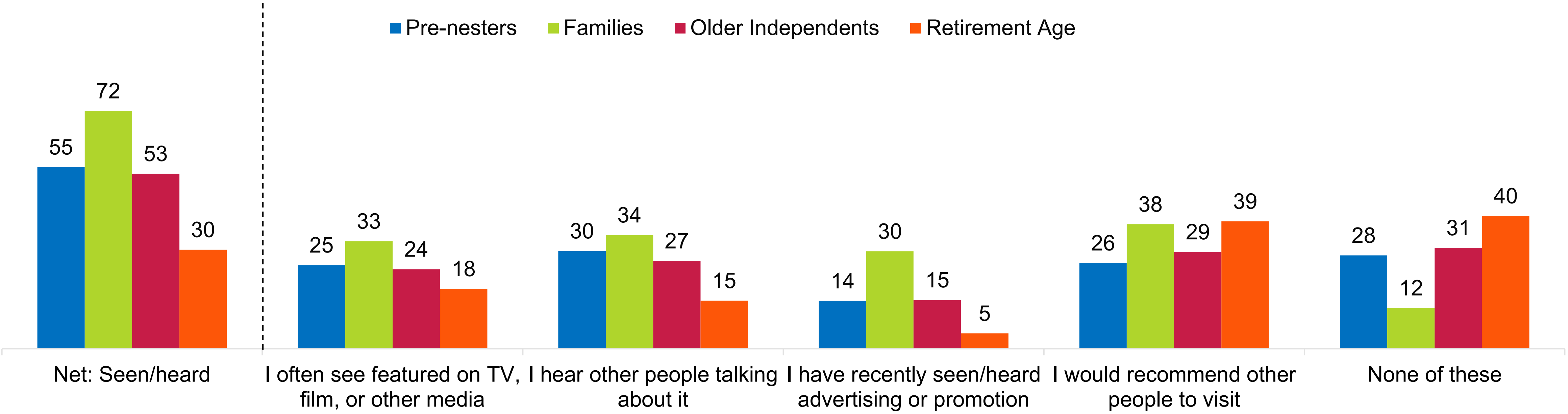
Ways in which seen/heard about Wales and other destinations

- Families are most likely to have seen/heard about Wales, with 72% saying they have done so at some level. Families are more likely than other life stages to have heard about Wales across all information sources.
- Retirees have the lowest engagement with Wales across all sources, but particularly with advertising or promotion. However, both retirees and families are more likely to say that they would recommend Wales to others as a place to visit.

Figure 76. Ways in which seen or heard about Wales, Percentage, All respondents by life stage



C2. Which, if any, of these statements apply to you and these destinations? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed recall is exaggerated or misplaced

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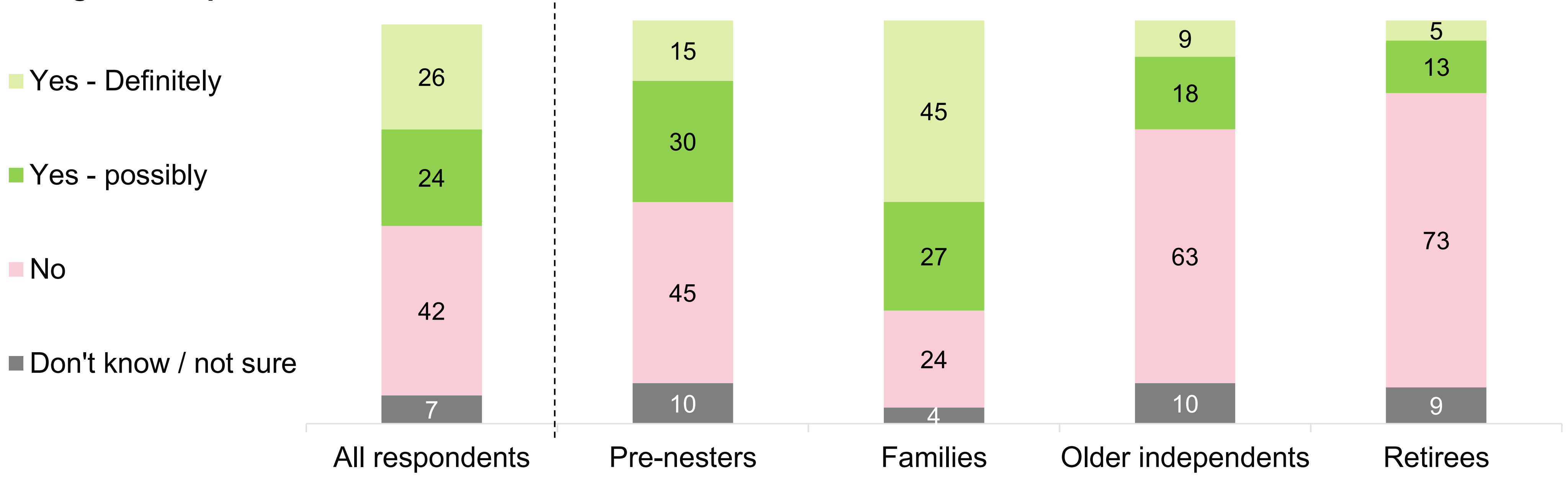
Recall or seen or heard about Wales promotions or marketing

- Just over half (51%) of the US vacation market 'definitely' or' possibly' recall seeing promotions or marketing about Wales in the last year or so, rising to 72% of those from a family life stage. Again, it's likely that this reflects recall of information relating to the UK as opposed to Wales specifically.
- Over 3 in 5 (63%) of older independents do not recall seeing any promotions or marketing about Wales in the last year or so, and this rises to nearly three quarters (73%) amongst retirees.

Figure 77. Whether recall seeing promotions or marketing about Wales in the last year or so, Percentage, All respondents

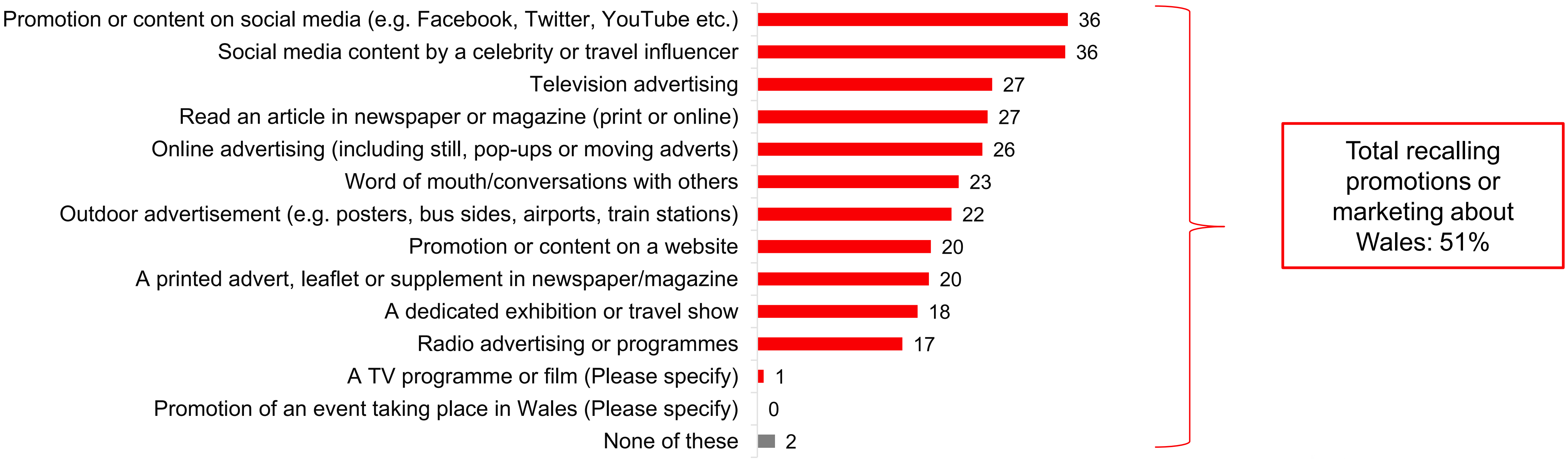


H1. Do you recall seeing any promotions or marketing about Wales in the last year or so? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=216; Families n=431 Older Independents n=260; Retirees n=88
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed recall is exaggerated or misplaced

Ways in which seen or heard about Wales

- Of the US vacation market who report ‘definitely’ or ‘possibly’ seeing promotions or marketing about Wales in the last year or so, they are most likely to recall seeing ‘promotion or content on social media’ (36%) and ‘social media content by a celebrity or travel influencer’ (36%). They are also most likely to recall seeing ‘television advertising’ (27%) and ‘reading an article in a newspaper or magazine’ (27%). There is minimal variation by life stage here.

Figure 78. 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 vacations 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=489

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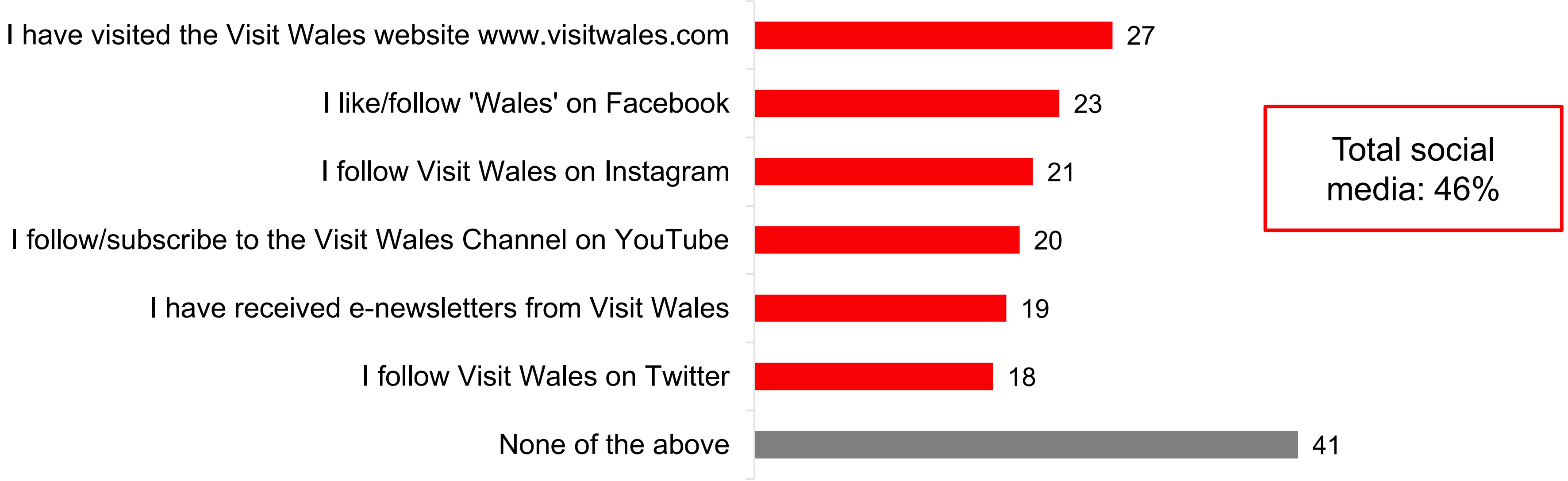
Contact with Visit Wales in last 12 months

- 3 in 5 of the US vacation market claim to have engaged with Visit Wales' communication channels in the last 12 months. As indicated with other findings however, this likely reflects broader engagement with UK information sources rather than engagement with Visit Wales.
- Of the different contact types, just over 1 in 4 (27%) have visited the Visit Wales website, with nearly 1 in 4 having liked/followed the Visit Wales Facebook page. Instagram, YouTube, e-newsletters and Twitter have similar engagement levels, with around 1 in 5 claiming to have engaged with each of these channels.
- Consistent with other reporting, families have the strongest engagement with Visit Wales channels, while retirees and older independents have the lowest.

Figure 79. 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.
Base: All respondents n=1,000
Note: Please analyse this data in context of reported Wales knowledge (Slide 45) which suggests claimed engagement is exaggerated or misplaced

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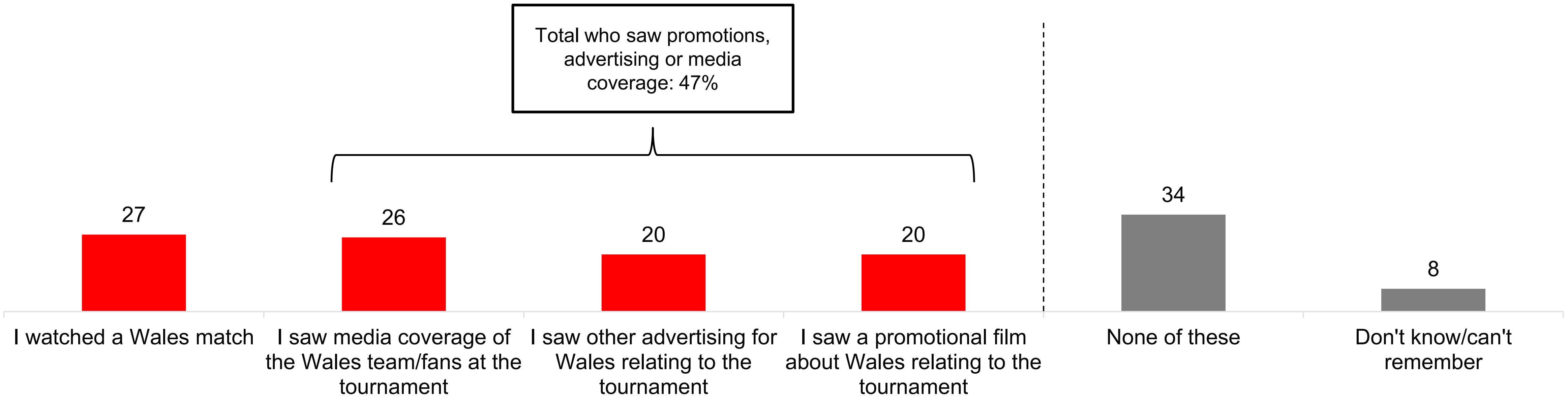
Promotion and awareness of Wales from Football World Cup (November 2022)

How much seen about Wales during the World Cup

- Over a quarter (27%) of the US 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 47% saw some form of media coverage about Wales.

Figure 80. 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=1,000

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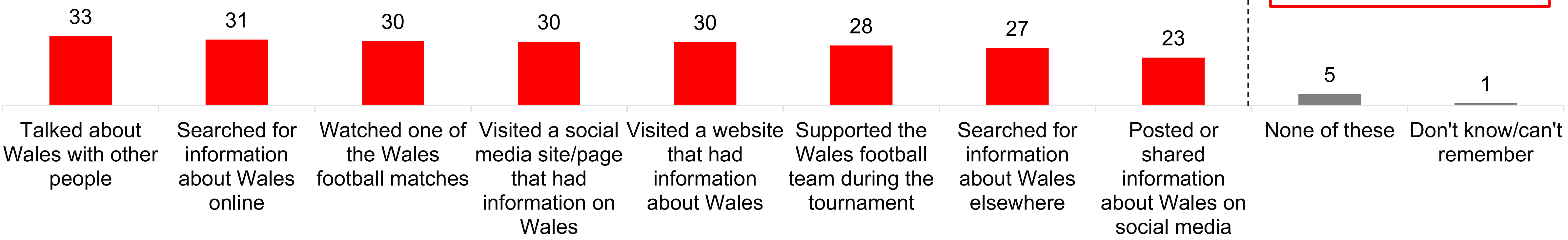
Engagement with Wales as a result of promotions

- 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, 94% of respondents engaged with Wales at some level as a result of watching football coverage or seeing promotions of Wales during the World Cup. A third talked about Wales with other people and 31% searched for information about Wales online.

Figure 81. 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

Total that have seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup: 58%



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=552

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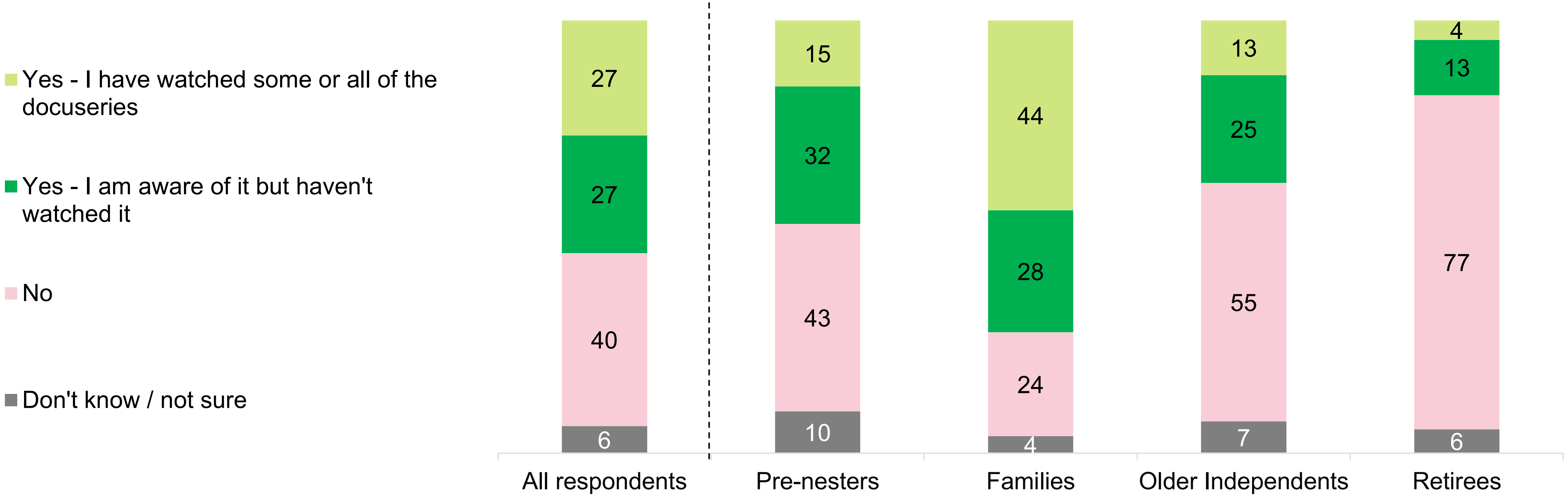
Wrexham promotional activity

How much heard or watched the “Welcome to Wrexham” docuseries

- Over half (54%) of the US vacation market report having heard of or watched the TV docuseries “Welcome to Wrexham”, mainly driven by families (72%).
- 2 in 5 of the US vacation market have not heard or watched the TV docuseries at all, driven mainly by older independents and retirees at 55% and 77% respectively.

Figure 82. Whether heard or watched the TV docuseries “Welcome to Wrexham”, Percentage, All respondents

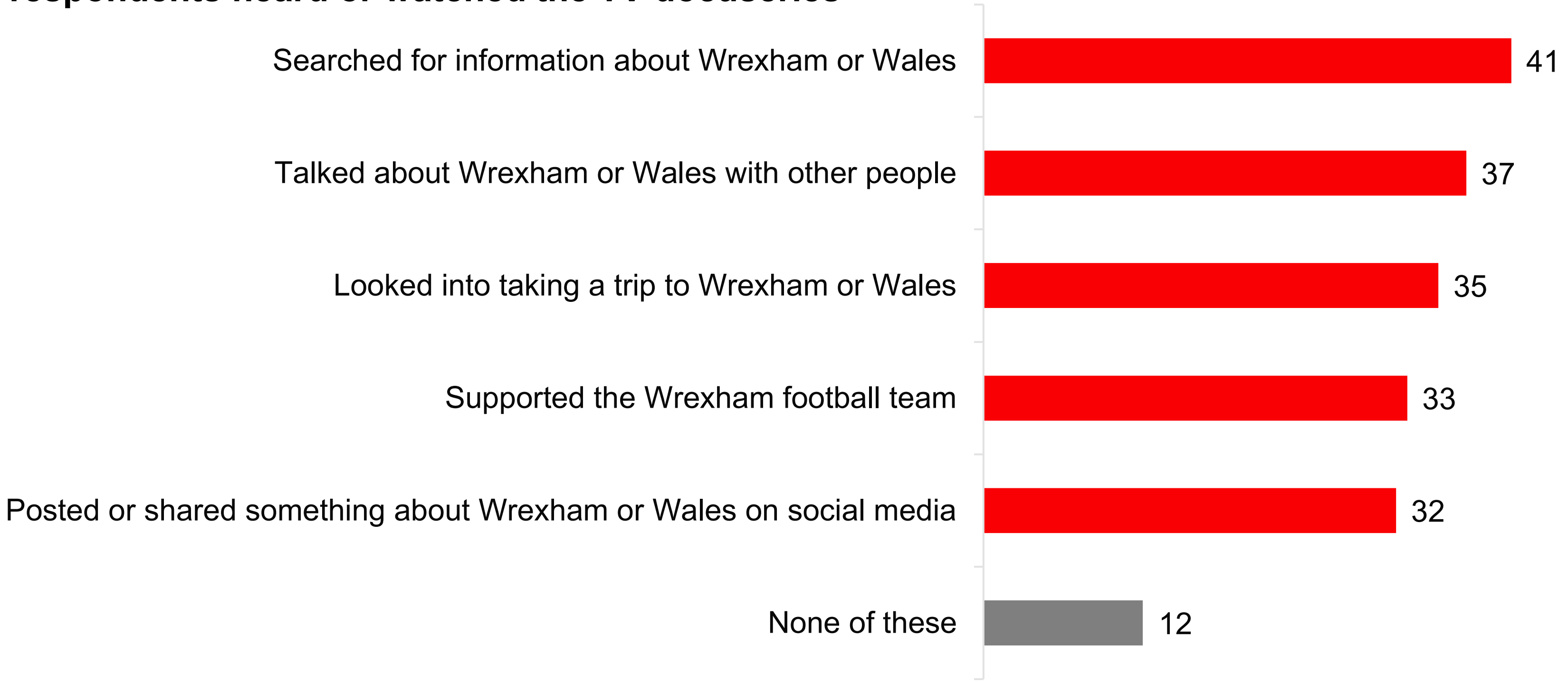


I3. Before filling out this questionnaire, had you heard or watched the TV docuseries “Welcome to Wrexham”?
Base: All respondents n=1,000. Pre-nesters n=216; Families n=431; Older independents n=260; Retirees n=88

Engagement with Wrexham promotional activity

- Of those that have heard or watched the TV docuseries "Welcome to Wrexham", nearly 9 in 10 (88%) had some kind of engagement after doing so.
- They were most likely to search for information about Wrexham or Wales, with just over 1 in 3 stating they are looking into taking a trip there.

Figure 83. Engagement with Visit Wales TV docuseries "Welcome to Wrexham", Percentage, All respondents heard or watched the TV docuseries



I4. Which, if any, of the following have you done as a result of hearing about or watching the TV docuseries "Welcome to Wrexham"? Base: All respondents that have heard or watched the TV docuseries "Welcome to Wrexham" n=520.

Perceptions of Wales before and after Wrexham promotional activity

- The majority who have heard or watched the TV docuseries state that it made them feel 'much more' or 'a little more' positive about Wales. Aligned with the increase in positive perceptions, over half of those who reported watching the docuseries state that the Wrexham promotional activity has increased their interest in visiting Wales a lot.

Figure 84. Perceptions of Wales after hearing or watching the TV docuseries, Percentage, All respondents heard or watched the TV docuseries

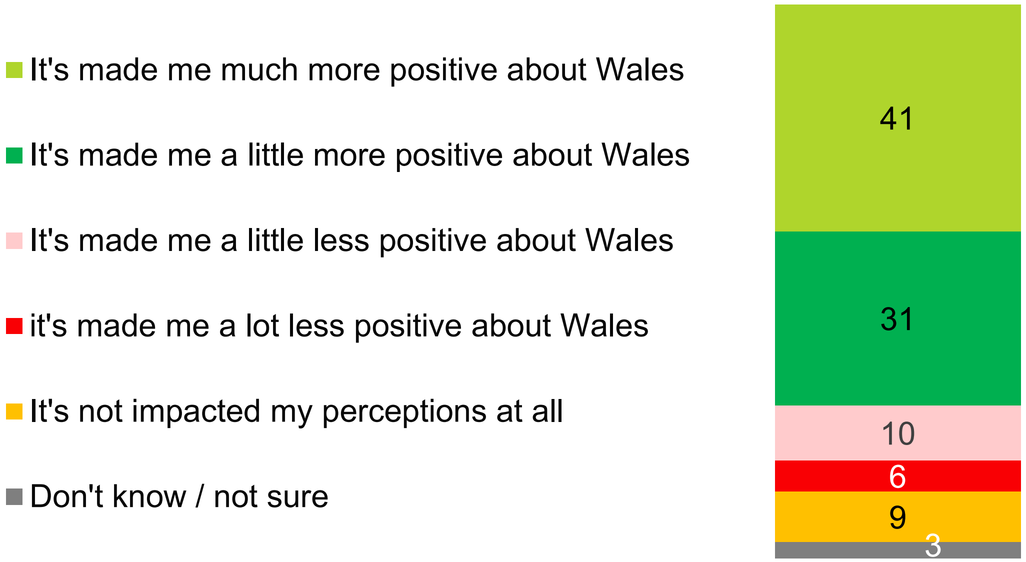
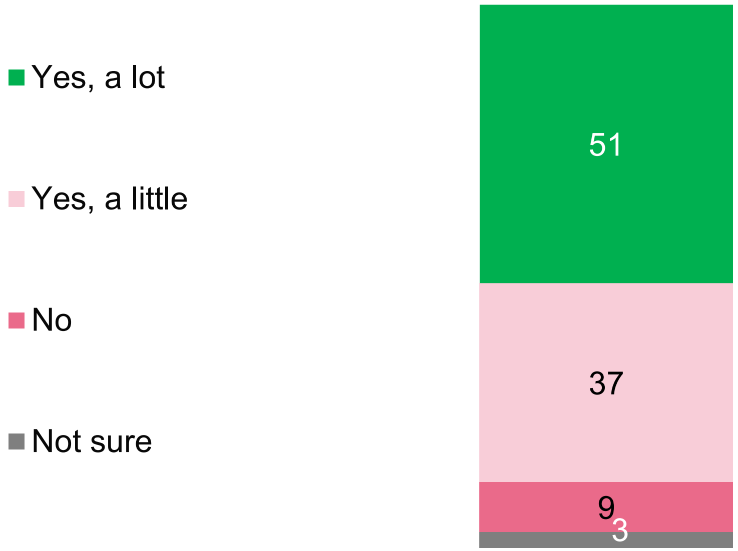


Figure 85. Extent to which docuseries increased interest in visiting Wales, Percentage, All respondents heard or watched the TV docuseries



I6. How if at all, has the docuseries "Welcome to Wrexham" impacted your perceptions of Wales? I7. Has the docuseries "Welcome to Wrexham" increased your interest in visiting Wales?
Base: All respondents heard or watched the TV docuseries "Welcome to Wrexham" n=520

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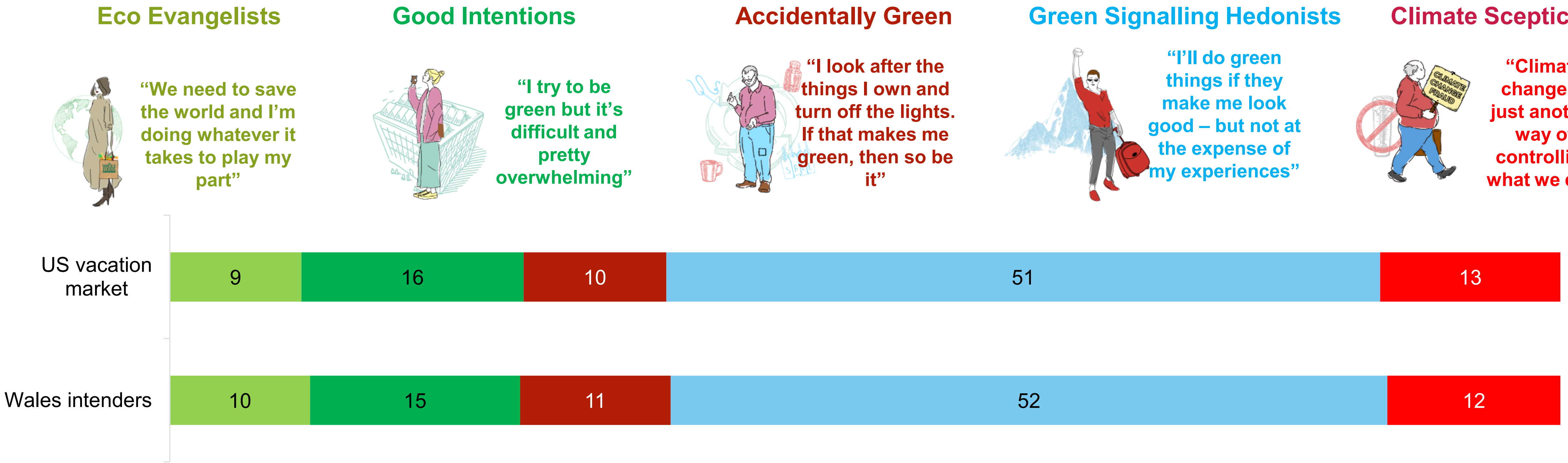
Understanding Attitudes to Sustainability

Breakdown of BVA BDRC sustainability segments

- The largest sustainability segment amongst the US vacation 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 1 in 4 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 86. Breakdown of Wales intenders by BVA BDRC sustainability segments



BVA BDRC sustainability segment questions
Base: All respondents n=1,000

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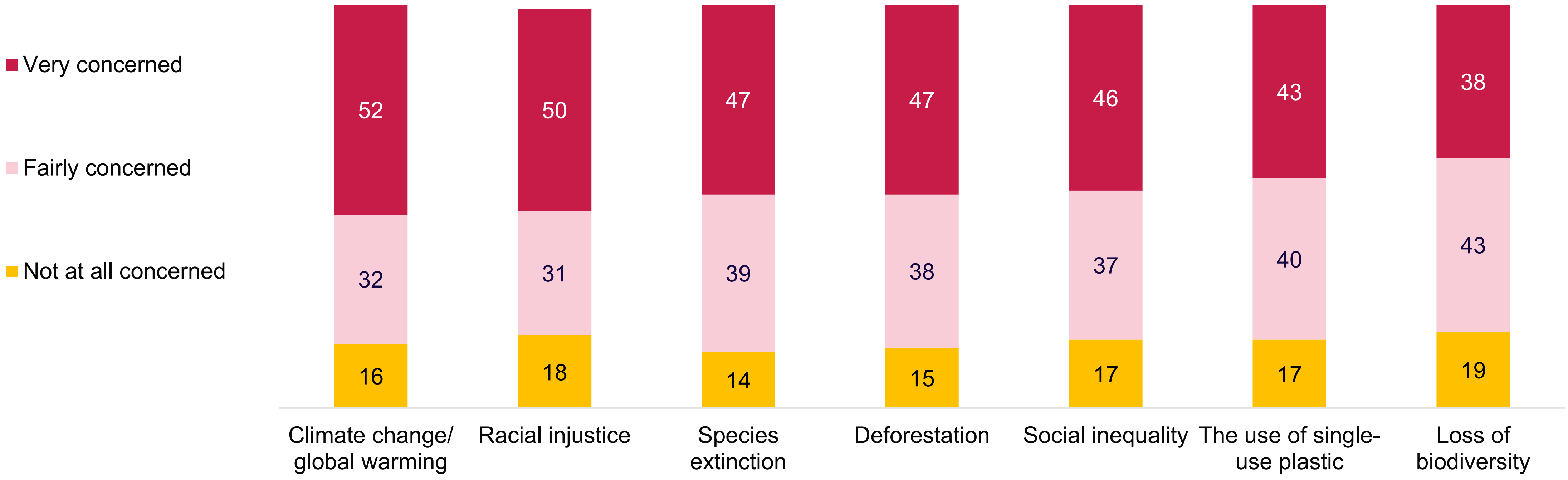
Top sustainability issues for the US vacation market

- Climate change, racial injustice, species extinction and deforestation are the biggest concerns of the US vacation market in relation to sustainability. 'Loss of biodiversity' is less of a concern. There is limited variation by life stage.

Figure 87. 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=1,000

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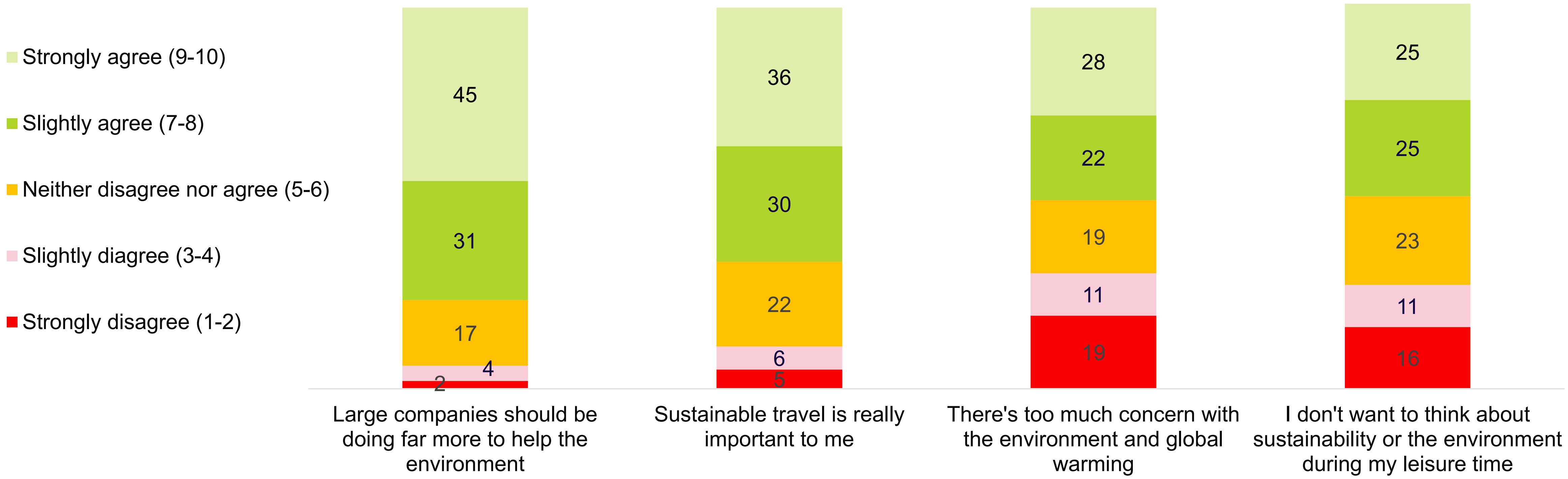
Attitudes to climate change and the environment

- ‘Large companies should be doing more to help the environment’ is the most agreed with sustainability statement from the US vacation market, with just over three quarters (76%) ‘strongly’ or ‘slightly’ agreeing with this. Around half 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’.
- Visit Wales trip intenders are slightly more likely to ‘strongly agree’ with the statement ‘sustainable travel is really important to me’.

Figure 88. Attitude to climate change and the environment, Percentage, All respondents

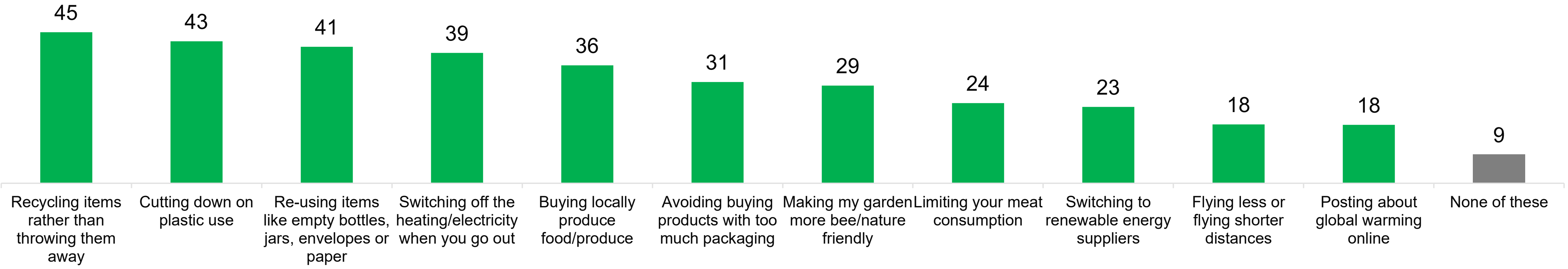


K1. Below are some statements other people have made about climate change and the environment. How much do you agree or disagree with each? (scale of 1-10) All data weighted.
Base: All respondents n=1,000

Individual sustainable actions

- The US vacation market is actively trying to help the environment in a range of different ways, particularly by recycling materials, cutting down on plastic use and re-using items. Notably, almost 1 in 5 (18%) are flying less or flying shorter distances, which may pose as a further barrier to trips to the UK.

Figure 89. 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=1,000

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 (1,000)	+/-1.4%	+/- 2.5%	+/- 3.1%
Pre-nesters (216)	+/- 2.9%	+/- 5.3%	+/- 6.7%
Families (431)	+/- 2.1%	+/- 3.8%	+/- 4.7%
Older Independents (260)	+/- 2.6%	+/- 4.9%	+/- 6.1%
Retirees (88)	+/- 4.6%	+/- 8.4%	+/- 10.4%
Wales trip intenders (858)	+/- 1.5%	+/- 2.7%	+/- 3.3%

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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 vacation	Vacation village/centre (e.g. Center Parcs or equivalent	Traditional seaside resorts	Large resort hotel	Mountain adventure	Wilderness and nature
62% London	52% London	52%	37% Rest of England	38% Rest of England	31% Rest of England	29% Rest of England	30% London	41%	33%
40%	50%	49% Rest of England	35%	36%	26%	24%	25% Rest of England	37%	31%
39%	49%	47%	35%	35%	26%	23%	23%	32%	30% Rest of England
37% Rest of England	49% Rest of England	44%	33%	31% London	26% London	22%	23%	31% Rest of England	24%
34%	44%	29% London	24% London	28%	24%	19% London	22%	18% London	15% London

D1. Which, if any, of these places do you most associate with these destination types? All data weighted.
Base: All respondents n=1,000

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Destination associations – trip influences

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

Famous landmarks and visitor attractions	A destination rich in history and heritage	Great value for money	Lots of activities and things to do	An authentic cultural experience	Incredible scenery and landscapes	High quality accommodation	Is easy to travel to and get around	People that are very welcoming
43% London	39%	25% Rest of England	36% London	34%	37%	34% London	30% London	29%
34%	37% London	24%	27%	34% London	35%	27%	24%	28%
33%	36%	22%	27%	33%	33% Rest of England	25%	23%	26% London
30% Rest of England	33% Rest of England	22% London	27% Rest of England	30% Rest of England	31%	23%	23% Rest of England	26% Rest of England
28%	33%	22%	23%	27%	25% London	21% Rest of England	20%	23%

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000

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Destination associations – trip influences

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

Places renowned for their food and drink	A thriving culture and entertainment scene	Great places to explore off the beaten track	Accommodation with charm and character	Opportunities to explore my hobbies and interests	Quiet places without crowds of people	Somewhere you can visit at all times of the year	Opportunities to meet and socialise with other people	An environmentally friendly destination
29% London	34% London	29%	30%	25% London	28%	31% London	29% London	22%
28%	25%	28% Rest of England	30%	22%	24% Rest of England	24% Rest of England	26%	22%
23%	25%	27%	29% London	21% Rest of England	24%	24%	25%	19%
21%	24% Rest of England	26%	27% Rest of England	21%	23%	23%	23% Rest of England	19% London
21% Rest of England	21%	21% London	26%	19%	15% London	20%	21%	19% Rest of England

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000

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Destination associations – trip experiences

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

Trying local food and drink	Visiting heritage sites or cultural attractions	Visiting outdoor visitor attractions	Learning about local history and culture	Speciality shopping	Exploring scenic areas by car	Walking, hiking or rambling	Nature and wildlife experiences	Experience the nightlife	Adventure activities	Attending live music, festival or arts performances	Visiting locations featured in TV, film or literature
36%	37% London	30%	32%	31% London	29% Rest of England	31%	29%	33% London	22%	28% London	29% London
35% London	33%	29% Rest of England	32% London	24%	28%	30%	27%	26%	22%	21%	25%
32% Rest of England	32%	29%	32%	24%	27%	29%	26% Rest of England	22%	21% Rest of England	21%	24%
31%	30%	28%	31% Rest of England	23% Rest of England	24%	27% Rest of England	24%	21% Rest of England	19%	19% Rest of England	21% Rest of England
29%	30% Rest of England	26% London	30%	20%	21% London	21% London	16% London	20%	19% London	18%	20%

D3. And which, if any, of these places do you think are best suited to these vacation experiences? All data weighted.
Base: All respondents n=1,000

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Destination associations – trip experiences

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

Visiting family attractions	Seasonal celebrations	Creative or artistic pursuits	Watching or taking part in a sports event	Health or wellbeing experiences	Visit friends or family	Water sports	Fishing - sea angling, coarse fishing, game fishing	Cycling or mountain biking	Golf	Conservation or volunteering activities
21% London	24% London	23% London	21% London	21% London	16% London	17%	19%	19%	17%	16%
18%	22%	23% Rest of England	17% Rest of England	17%	15% Rest of England	17% Rest of England	18%	18%	15%	15% Rest of England
17% Rest of England	20% Rest of England	21%	17%	17%	15%	16%	18%	18% Rest of England	12% Rest of England	15%
17%	20%	20%	16%	15% Rest of England	14%	15%	18% Rest of England	15%	12%	15% London
16%	17%	19%	15%	15%	13%	15% London	14% London	14% London	9% London	13%

D3. And which, if any, of these places do you think are best suited to these vacation experiences? All data weighted.
Base: All respondents n=1,000

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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***	249.8m	45.0m	69.9m	79.9m	55.0m
% of population very/ fairly likely to visit UK in next few years	42%	41%	73%	30%	19%
% of market very/fairly familiar with Wales	45%	40%	53%	26%	25%
% of market visited Wales in the past	40%	33%	58%	23%	23%
% of market 'very interested' in visiting Wales in next few years	52%	37%	69%	42%	26%
Top 3 preferred UK destination types (weaker Wales perceptions in red)	1.Scenic countryside 2.Historic/Heritage towns 3.Cities and large towns	1.Cities and large towns 2.Historic/Heritage towns 3.Scenic countryside	1.Cities and large towns 2.Historic/Heritage towns 3.vacation villages	1.Historic/Heritage towns 2.Scenic countryside 3.Cities and large towns	1.Historic/Heritage towns 2.Scenic countryside 3.Cities and large towns
Top 3 UK influences (weaker Wales perceptions in red)	1.Famous landmarks 2.Rich in history 3.Value for money	1.Lots of activities 2.Value for money 3.Famous landmarks	1.Quality accommodation 2.Value for money 3.Famous landmarks	1.Rich in history 2.Famous landmarks 3.Authentic culture	1.Rich in history 2.Famous landmarks 3.Authentic culture
Top 3 UK experiences (weaker Wales perceptions in red)	1.Local food and drink 2.Heritage sites 3.Outdoor attractions	1.Local food and drink 2.Heritage sites 3.Local history and culture	1.Heritage sites 2.Outdoor attractions 3.Local food and drink	1.Local food and drink 2.Heritage sites 3.Local history and culture	1.Heritage sites 2.Local food and drink 3.Local history and culture

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Segment summary

Table 7. Summary of key findings by segment

	Adventurers	Experience Seekers	Explorers	Sightseers	Cultural Buffs
Size of adult population	42.5m	52.5m	82.4m	37.5m	35.0m
% of population very/ fairly likely to visit UK in next few years	60%	69%	12%	29%	44%
% of market very/fairly familiar with Wales	34%	58%	32%	39%	44%
% of market visited Wales in the past	24%	52%	29%	36%	46%
% of market 'very interested' in visiting Wales in next few years	45%	61%	42%	49%	49%
Top 3 preferred UK destination types (weaker Wales perceptions in red)	1.Historic/Heritage towns 2.Scenic countryside 3.Cities and large towns	1.Cities and large towns 2.Historic/Heritage towns 3.Large resort hotel	1.Historic/Heritage towns 2.Scenic countryside 3.Cities and large towns	1.Cities and large towns 2.Historic/Heritage towns 3.Scenic countryside	1.Cities and large towns 2.Historic/Heritage towns 3.Scenic countryside
Top 3 UK influences (weaker Wales perceptions in red)	1.Rich in history 2.Famous landmarks 3.Value for money	1.Quality accommodation 2.Lots of activities 3.Famous landmarks	1.Welcoming people 2.Rich in history 3.Famous landmarks	1.Rich in history 2.Famous landmarks 3.Authentic culture	1.Value for money 2.Quality accommodation 3.Famous landmarks
Top 3 UK experiences (weaker Wales perceptions in red)	1.Local food and drink 2.Heritage sites 3.Local history and culture	1.Local food and drink 2.Heritage sites 3.Outdoor attractions	1.Heritage sites 2.Local food and drink 3.Local history and culture	1.Heritage sites 2.Local food and drink 3.Local history and culture	1.Local food and drink 2.Outdoor attractions 3.Heritage sites

Relationship with Wales

- This slide demonstrates the difference in the claimed relationship with Wales amongst a nationally representative audience, and the US vacation market (those very or fairly likely to take an overnight trip to the UK in the next few years). Unsurprisingly it demonstrates that those within the US vacation market are more likely to report having a connection to Wales, compared to nationally representative respondents.

Figure 90. Relationship with Wales, Percentage, Nationally representative respondents

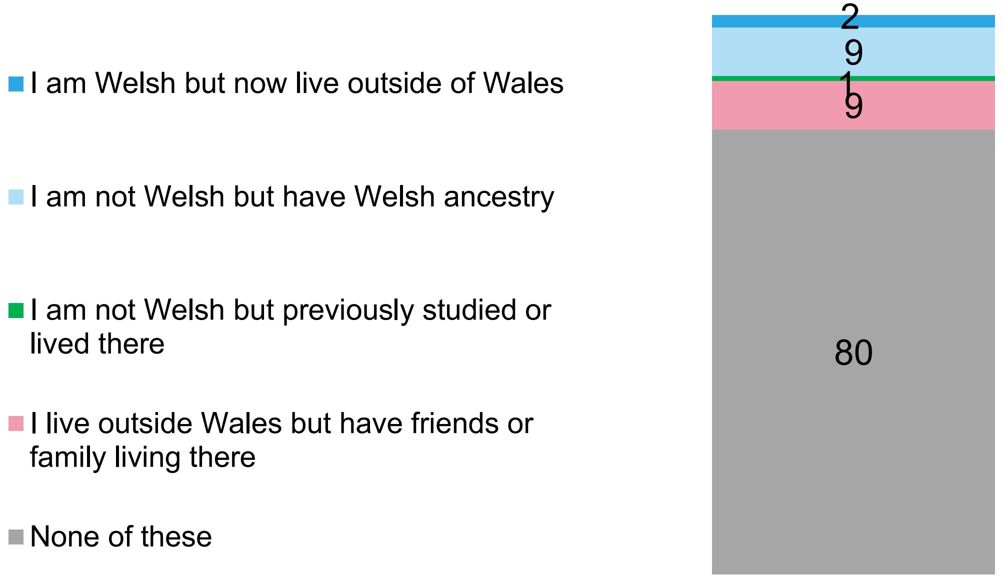
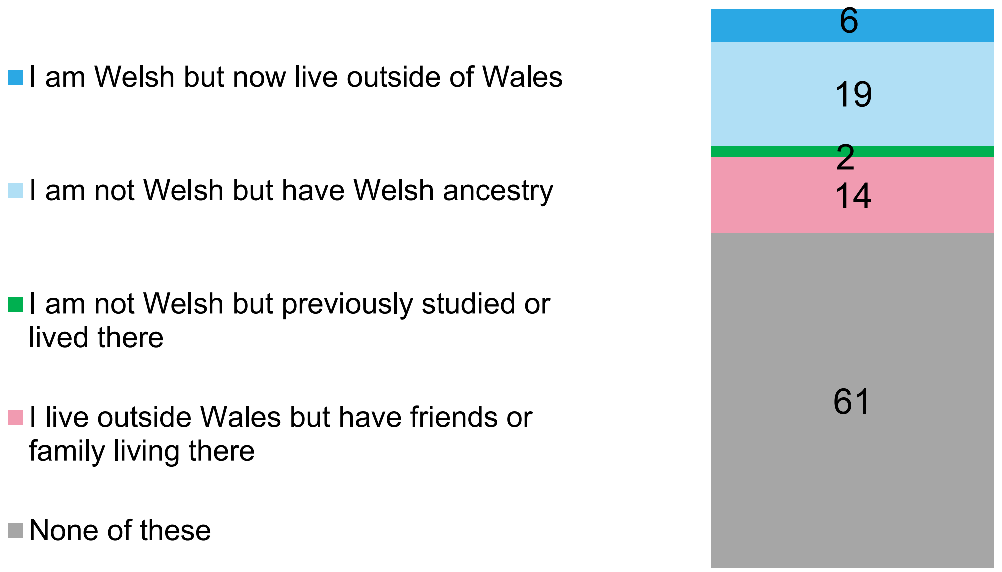


Figure 91. Relationship with Wales, Percentage, All respondents

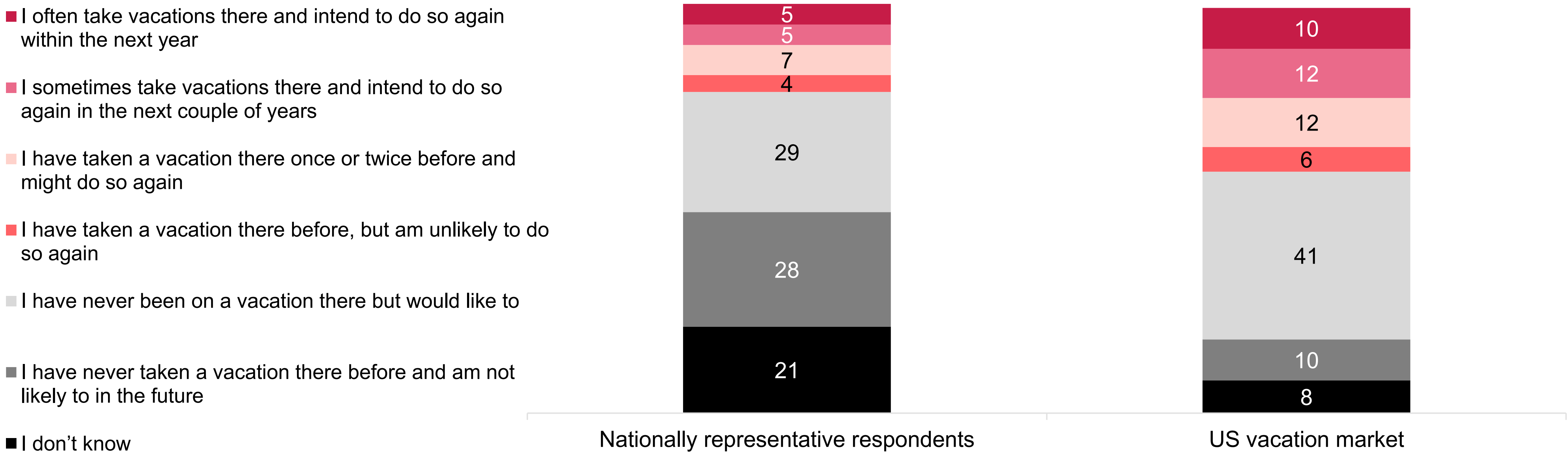


X9. Which, if any, of the following apply to you? For segment questions see introduction. All data weighted.
Base: Nationally representative respondents n=218; All respondents n=1,000

Loyalty with Wales

- This slide demonstrates the difference in loyalty with Wales amongst a nationally representative audience, and the US vacation market (those very or fairly likely to take an overnight trip to the UK in the next few years). Similar to relationship with Wales, those within the US vacation market are more likely to have visited Wales and to be interested in doing so in the future, compared to nationally representative respondents.

Figure 92. Relationship with Wales, Percentage, All respondents



C3. Which of the following statements best applies to you when it comes to visiting these destinations? All data weighted.
Base: Nationally representative respondents n=218; All respondents n=1,000

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