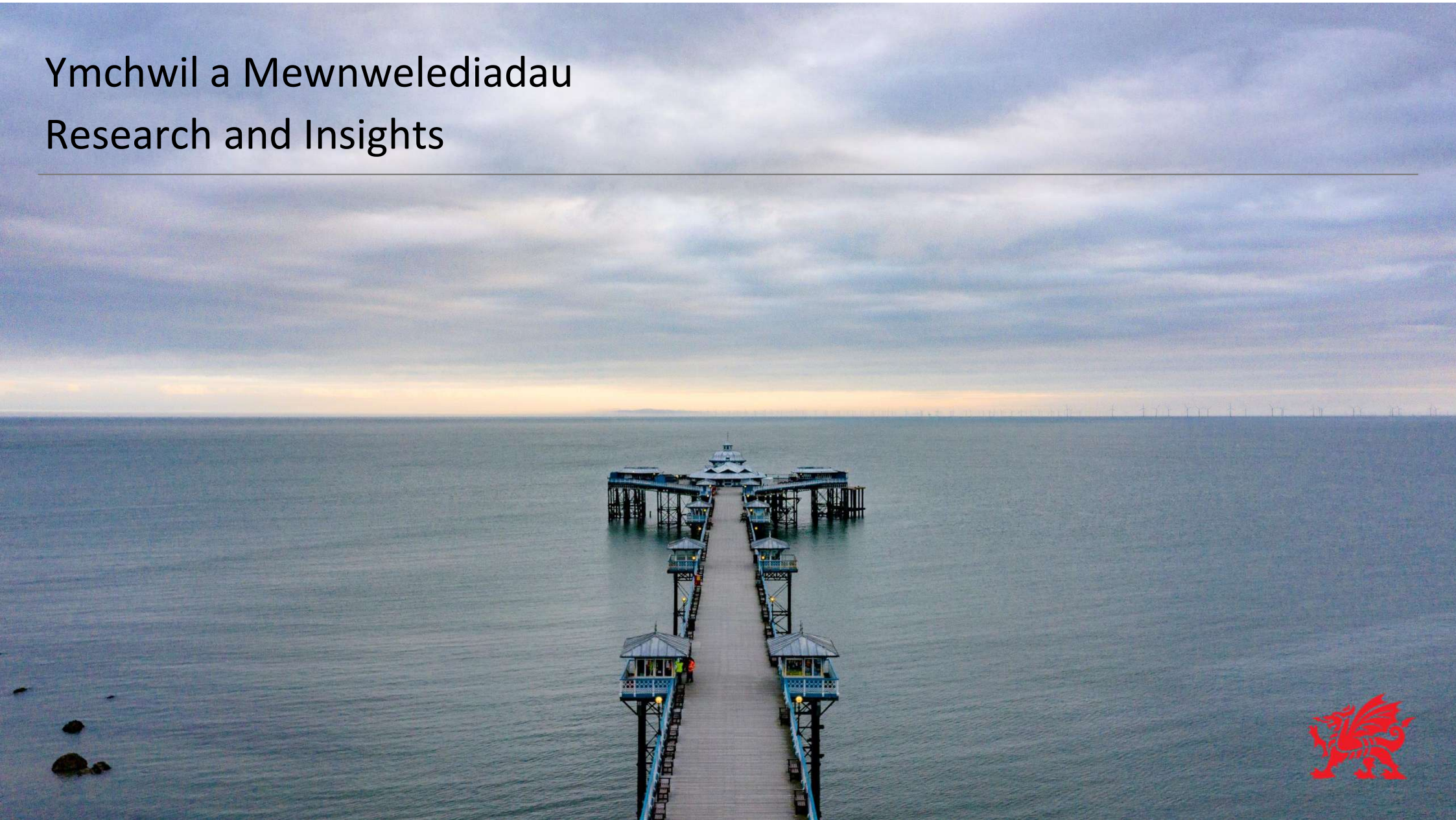


Ymchwil a Mewnwelediadau

Research and Insights



Beth fyddwn ni'n ei drafod heddiw

- Trosolwg o'r hyn rydym yn ei wneud
- Pa ffynonellau sydd gennym
- Prif berfformiadau
- Tueddiadau sy'n dod i'r amlwg
- Perfformiad ranbarthol
- Teimladau ynghylch Teithiau Domestig

What we'll cover today

- Overview of what we do
- What sources we have
- Headline performance
- Emerging trends
- Regional performance
- Domestic Trip Sentiment



Ystadegau Swyddogol

- Gwybodaeth i ddeall amodau sylfaenol y farchnad a'r galw
- Amcangyfrifon o nifer, gwerth, nodweddion teithiau a gymerwyd o wahanol farchnadoedd a chyfleoedd ar gyfer twf
- Arolwg Teithwyr Rhyngwladol
- Arolwg Twristiaeth Prydain Fawr
- Arolwg Ymweliadau Dydd Prydain Fawr
- Olrhain gyrwyr sylfaenol y galw drwy ystadegau economaidd wedi'u cyhoeddi

Official Statistics

- Estimates of the volume, value, characteristics of trips taken from different markets and opportunities for growth
- International Passenger Survey
- Great Britain Tourism Survey
- Great Britain Day Visits Survey
- Track underlying demand drivers via published economic stats



Galw yn y farchnad a gwerthuso

- Amodau'r Farchnad – diddordeb a chynlluniau ar gyfer ymweld
- Mathau o wyliau sy'n cael ei gynllunio
- Canfyddiadau o Gymru a chyrchfannau cystadleuwyr
- Perfformiad marchnata Croeso Cymru
- Gwybodaeth wedi'i rhannu gan segmentau targed, rhanbarth

Market demand and brand evaluation

- Market Conditions – interest and plans for visiting
- Type of holidays being planned
- Perceptions of Wales and competitor destinations
- How Visit Wales marketing is performing
- Information broken down by target segments, region



Ymchwil Ochr Gyflenwi

- Olrhain cystadleurwydd a pherfformiad y diwydiant a'r gallu i ddiwallu anghenion newidiol y farchnad
- Arolwg Defnydd Llety Cymru a data digidol arall
- Baromedr Busnes Twristiaeth Cymru
- Data stoc gwelyau

Supply Side Research

- Tracks the competitiveness and performance of the industry and capacity to meet changing market needs
- The Wales Accommodation Occupancy Survey & other digital data
- Wales Tourism Business Barometer
- Bedstock data



Monitro Profiad Ymwelwyr

Mae nodi proffil ac ymddygiad ymwelwyr a boddhad ymwelwyr yn helpu i nodi meysydd o fantais gystadleuol a blaenoriaethau ar gyfer buddsoddi

- Ysgogiadau i Ymweld
- Agweddau a graddfeydd
- Proffil taith
- Ffynonellau gwybodaeth ac archebu
- Disgwyliadau

Visitor Experience Monitoring

Identifies the profile and behaviour of visitors and visitor satisfaction helps identify areas of competitive advantage and priorities for investment

- Visit Motivations
- Attitudes and ratings
- Trip profile
- Information sources & booking
- Expectations



Cynllunio a Pherfformiad

Deall, rhagweld a mesur effeithiau twristiaeth

- Effeithiau economaidd, cymdeithasol ac amgylcheddol
- Peilot Arolwg Trigolion mewn 3 Awdurdod Lleol
- Gwerthuso buddsoddiadau

Planning and Performance

To understand, predict and measure the impacts of tourism

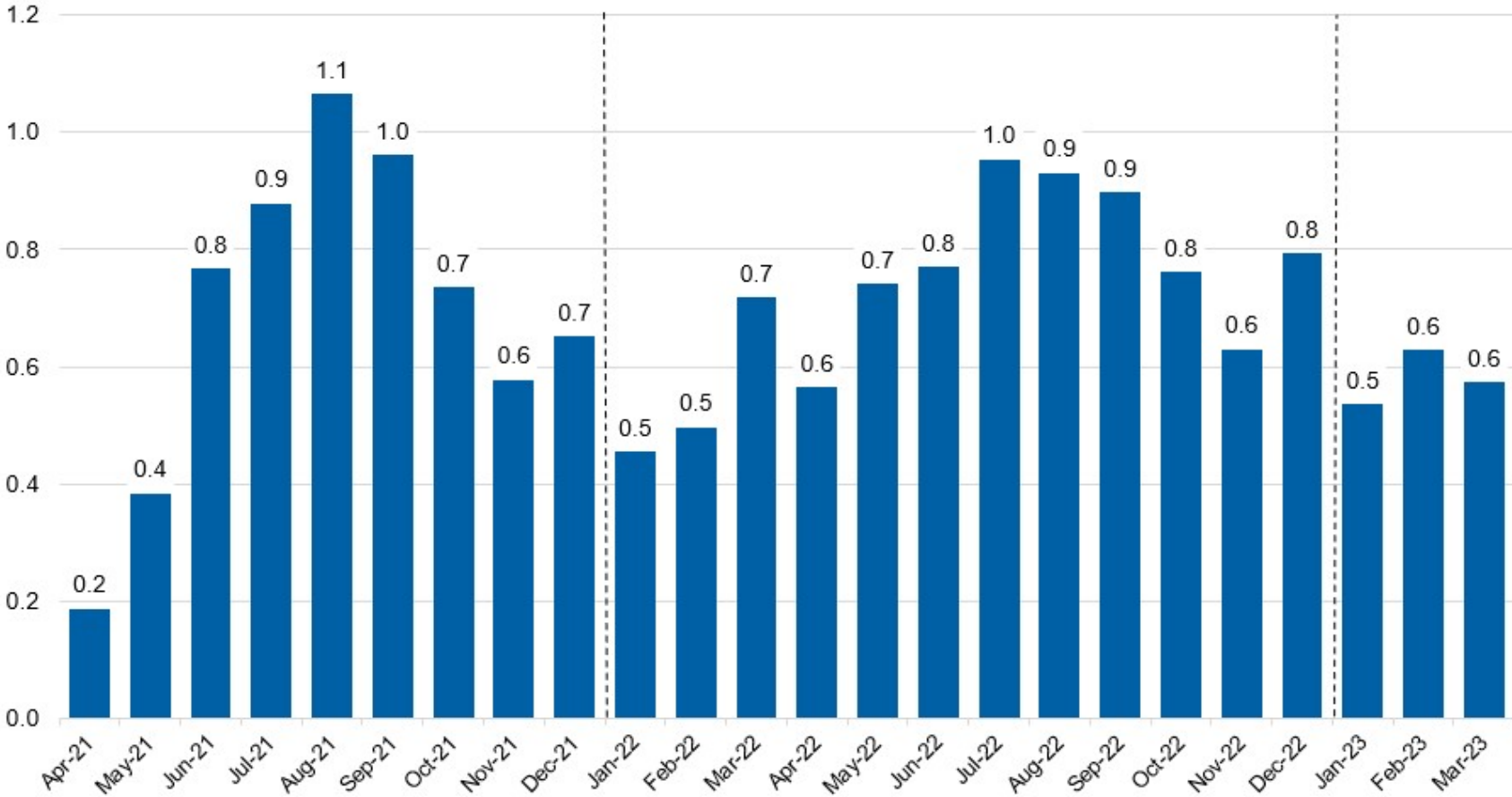
- Economic, social and environmental impacts
- Residents Survey Pilot in 3 Local Authorities
- Evaluation of investments



Teithiau dros nos domestig - nifer

Domestic overnight trips – volume

Nifer y teithiau dros nos domestig i Gymru mewn miliynau, Ebrill 2021 i Mawrth 2023
Volume of domestic overnight trips to Wales in millions, April 2021 to March 2023



Teithiau dros nos domestig: gwerth a hyd

Domestic overnight trips: value and duration

—DU, 2022: £32.88 biliwn

—Cymru 2022. £1.92 biliwn

—6% o'r gwariant

—3.0 noson fesul taith

—GB, 2022: £32.88 billion

—Wales 2022: £1.92 billion

—6% of expenditure

—3.0 nights per trip



Teithiau dros nos domestig: mathau o deithiau

Types of domestic overnight trips

Mathau o deithiau domestig dros nos

Math o daith	Teithiau i Gymru yn 2022 (miliynau)
Gwyliau	3.84
Ymweld â ffrindiau â theulu	2.66
Busnes	0.52
Amrywiol	1.69

Domestic overnight trips: trip types

Trip type	Trips to Wales in 2022 (millions)
Holiday	3.84
Visits to friends and relatives	2.66
Business	0.52
Miscellaneous	1.69

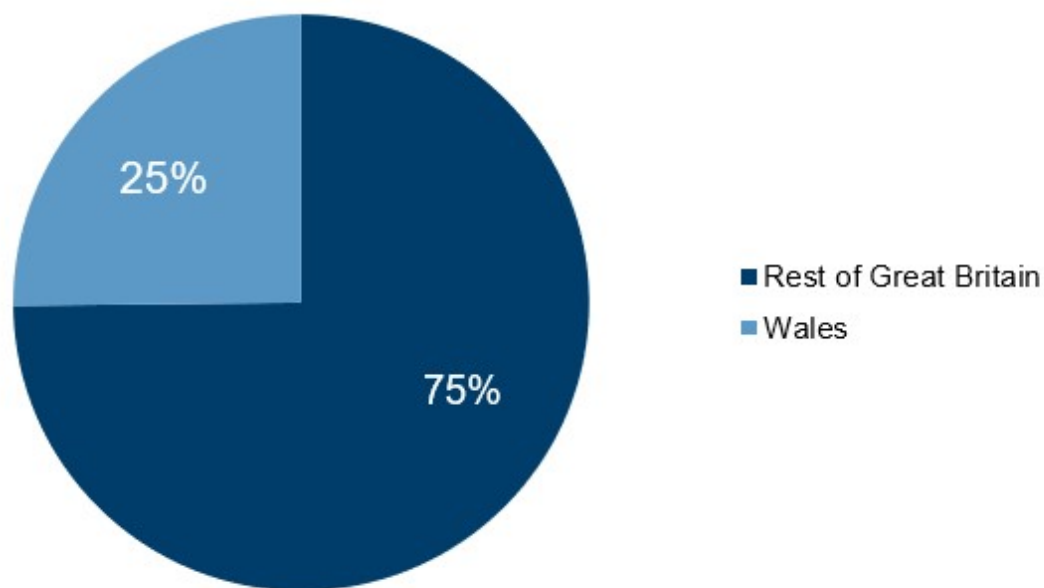


Teithiau dros nos domestig: proffil ymwelwyr ar gyfer 2022

Domestic overnight trips: visitor profile for 2022

Cyfran yr ymwelwyr dros nos domestig i Gymru fesul gwlad breswyllo
2022.

Proportion of domestic overnight visitors to Wales by nation of residence,
2022



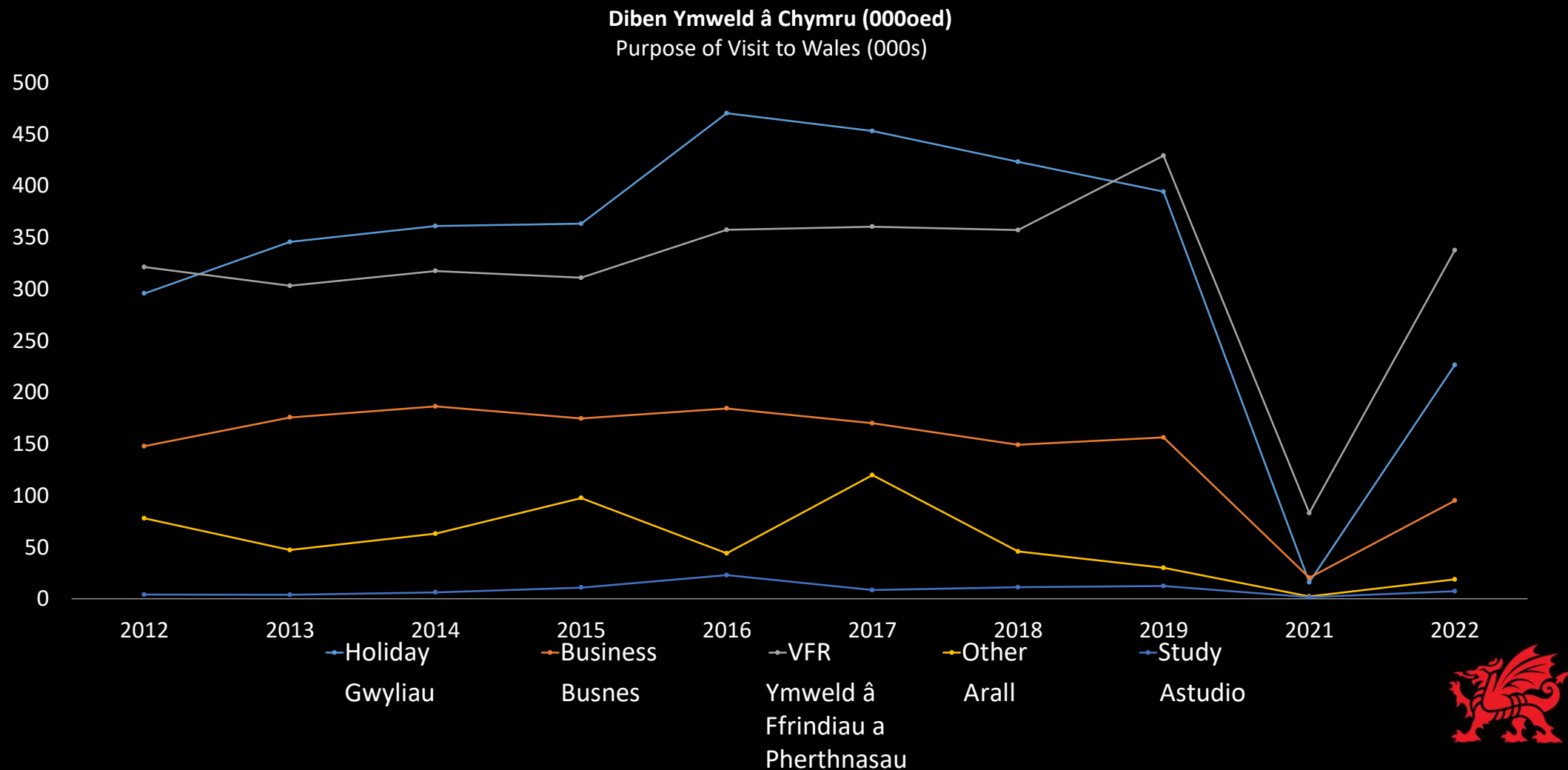
- Gwlad enedigol
- Oedran
- Maint y parti
- Plant

- Home region
- Age
- Party size
- Children accompanying



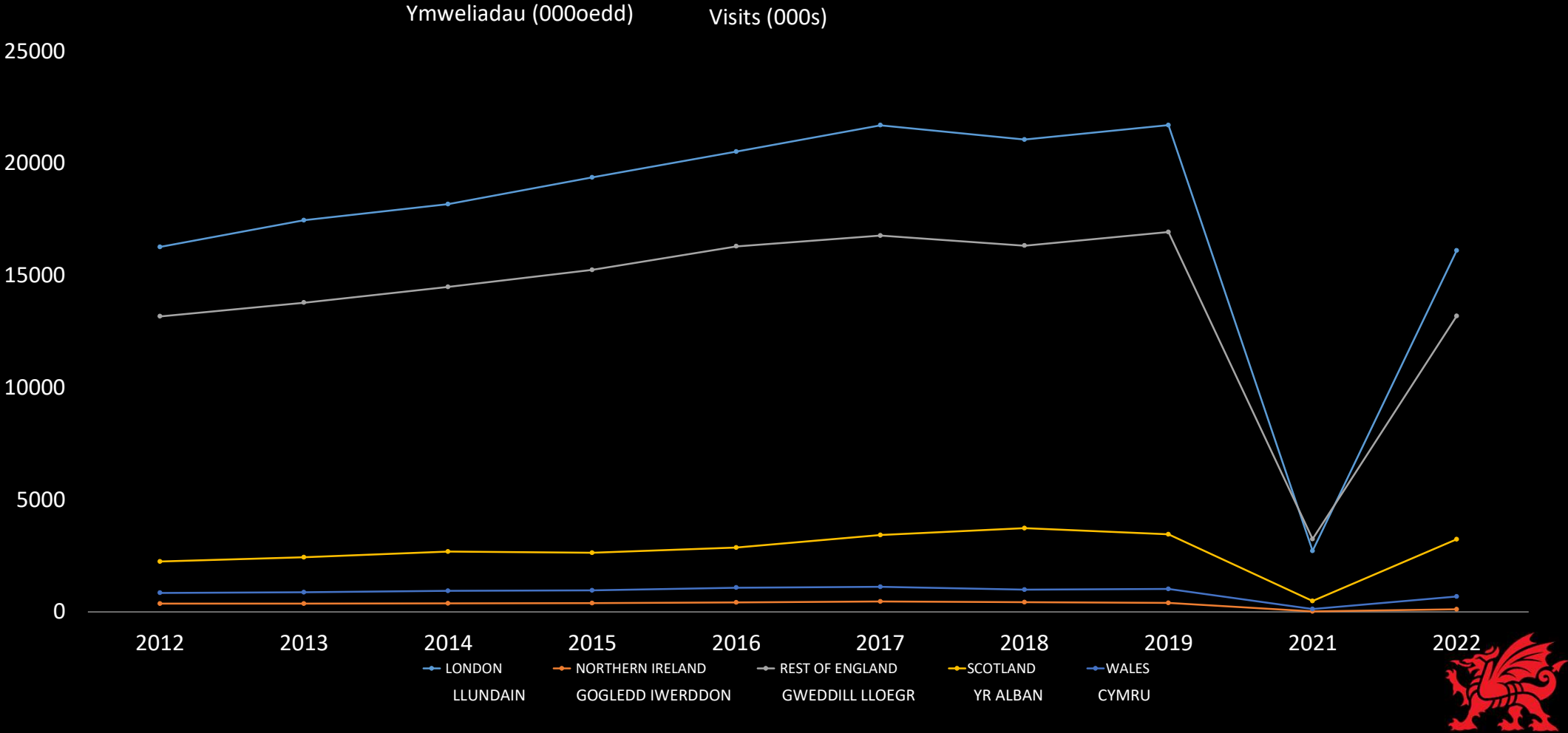
IPS – Pwrpas Ymweld â Chymru

IPS – Purpose of Visit to Wales



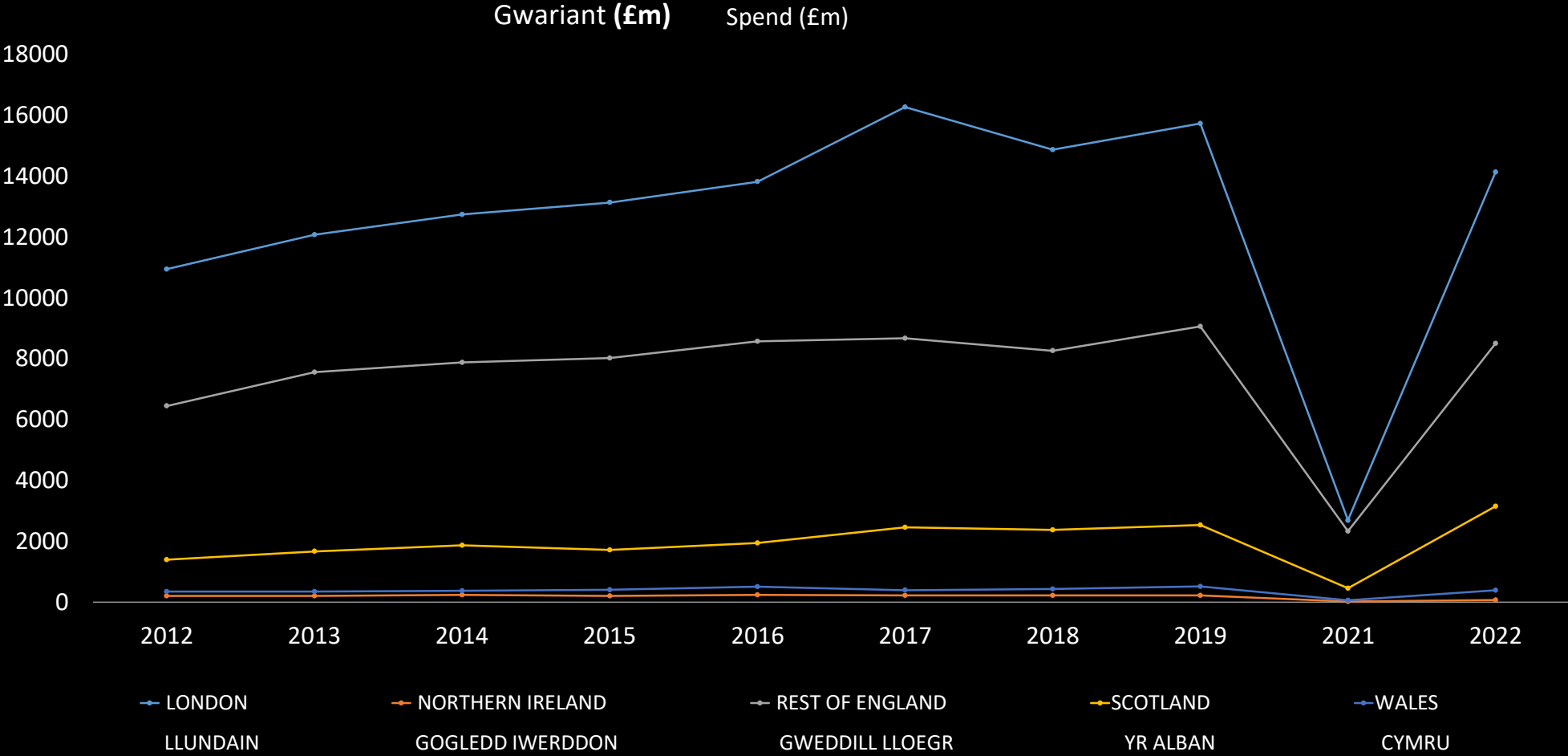
IPS - Cymharu Ymweliadau â Gwledydd y DU

IPS – Visits Comparison with UK Nations



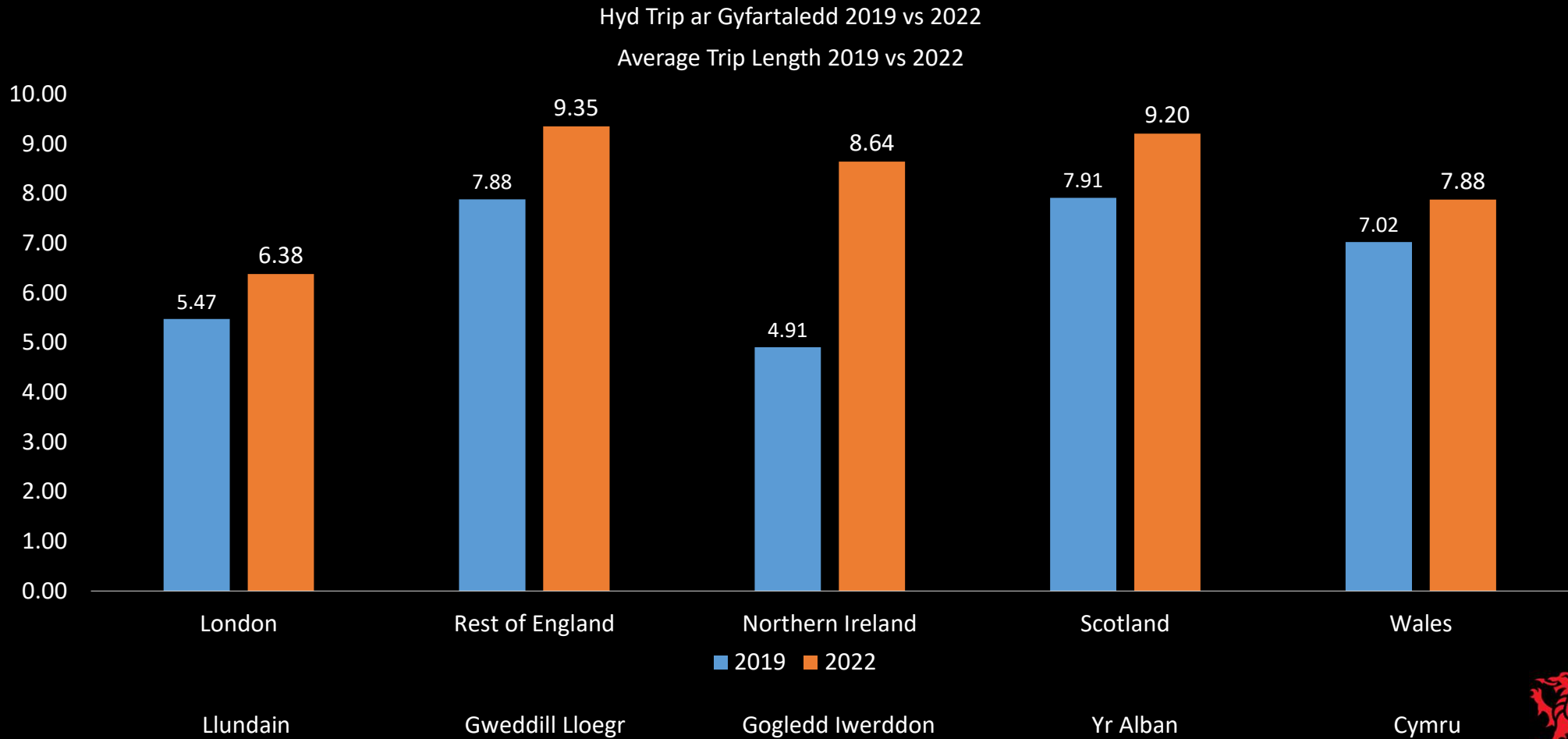
IPS – Gwariant

IPS – Spend



IPS - Hyd Taith ar Gyfartaledd

IPS – Average Trip Length



IPS 2023 - Hyd yma

IPS 2023 So Far

Visits	Q1 2023	% change vs Q1 2019	% change vs Q1 2022
Total England	7.0m	-7%	104%
London	4.2m	-8%	127%
Rest Of England	3.1m	-6%	84%
Scotland	572,000	29%	125%
Wales	151,000	-4%	107%
Total UK	7.7m	-8%	105%

Ymweliadau	Q1 2023	% newid vs Q1 2019	%newid vs Q1 2022
Cyfanswm Lloegr	7.0m	-7%	104%
Llundain	4.2m	-8%	127%
Gweddill Lloegr	3.1m	-6%	84%
Yr Alban	572,000	29%	125%
Cymru	151,000	-4%	107%
Cyfanswm	7.7m	-8%	105%



Gogledd Cymru - 2022

North Wales – 2022

2.29m o deithiau domestig

£517 miliwn o wariant domestig
(gwariant uchaf yng Nghymru)

187,000 o ymwelwyr rhyngwladol

£98miliwn o wariant rhyngwladol

2.29m domestic trips taken

£517m domestic spend (highest spend
in Wales)

187,000 international visitors

£98m international spend



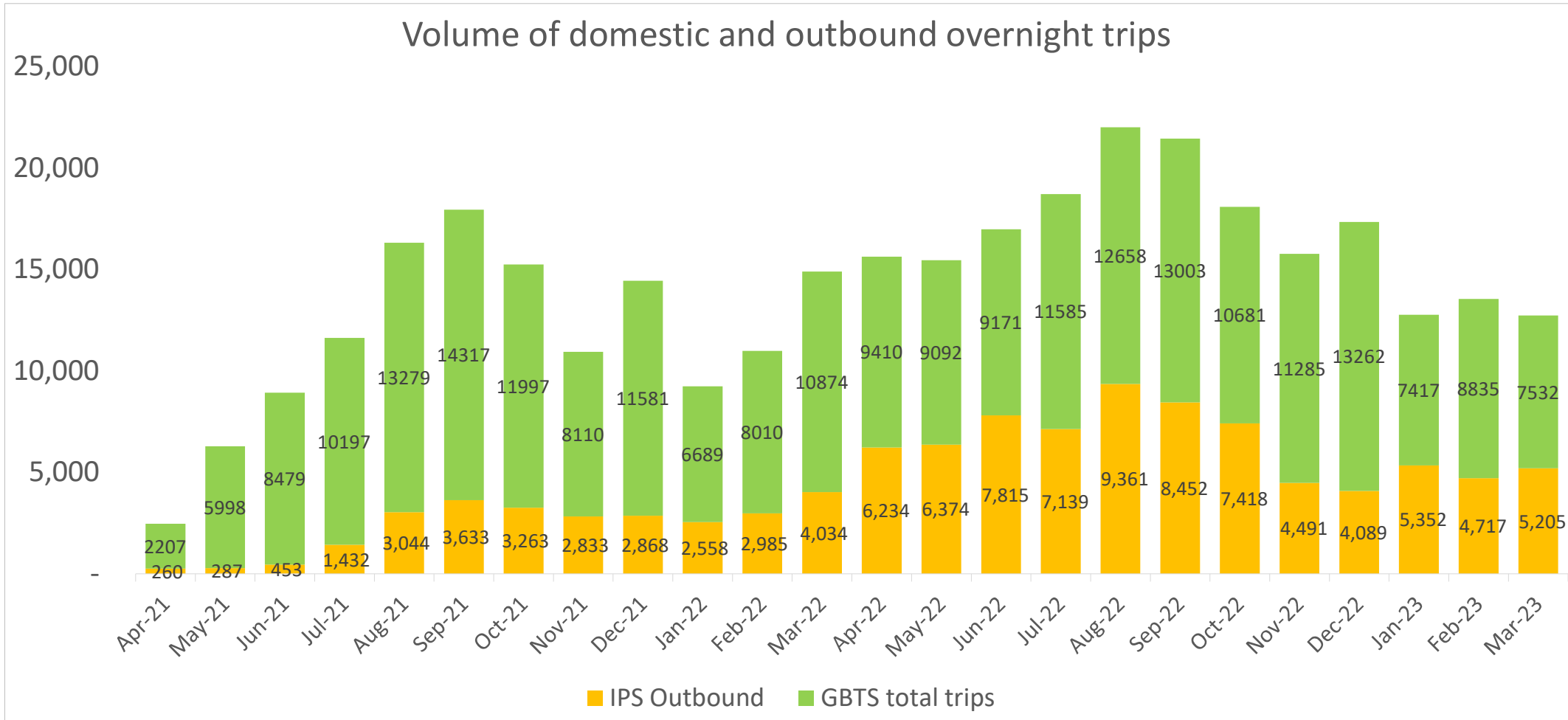
Prif Ymweliadau Dydd Twristiaeth a chipolwg o weithgareddau GBDVS – topline TDV and snapshot of activities

- **2022:** 62.0 miliwn o deithiau dydd twristiaeth i Gymru – 6% o deithiau dydd domestig ym Mhrydain Fawr
 - £2.37 biliwn wedi'i wario - 5% o'r gwariant ar deithiau dydd domestig ym Mhrydain
 - Y tri gweithgaredd uchaf:
 1. Ymweld â ffrindiau a pherthnasau
 2. Mynd i atyniad i ymwelwyr
 3. Bwyd a diod, noson allan neu siopa arbenigol
- **2022:** 62.0 million tourism day trips to Wales – 6% of domestic day trips taken in Great Britain
 - £2.37 billion spent – 5% of expenditure on domestic day trips taken in Great Britain
 - Top three activities undertaken:
 1. Visiting friends and relatives
 2. Went to a visitor attraction
 3. Food and drink, a night out or speciality shopping



Arwyddion bod adferiad teithiau allan wedi cyflymu yn 2023

Indications that recovery of outbound trips picked up pace in 2023



Traciwr Teimladau Domestig

Domestic Sentiment Tracker

Croeso Cymru, VisitEngland a VisitScotland

Ffocws cychwynnol ar COVID-19 – bellach yn canolbwyntio ar yr argyfwng costau byw

Misol

Mae 76% yn bwriadu mynd ar daith dros nos yn y DU yn ystod y 12 mis nesaf

Mae 67% yn bwriadu mynd ar daith dramor dros nos yn ystod y 12 mis nesaf

Visit Wales, VisitEngland and VisitScotland

Initial focus on COVID-19 – now focused upon the cost-of-living crisis

Monthly basis

76% intend to take an overnight UK trip in the next 12 months

67% intend to take an overnight overseas trip in the next 12 months



Edrych at y dyfodol

- Mae'r mewnwleidiadau a ranwyd heddiw yn giplun lefel uchel yn unig
- Mwy o ddata digidol i ddeall galw'r dyfodol
- Mae Croeso Cymru yn defnyddio ystod eang o ddata ar y galw gan defnyddwyr ac amodau'r farchnad allai eich helpu
- Mae rhagor o ymchwil ar gael ar gais – cysylltwch â ni
- ymchwiltwristiaeth@llyw.cymru
- Diolch

Forward look

- The insights shared today is just a high-level snapshot
- More digital data to understand future demand
- VW uses a wide range of data on consumer demand and market conditions that can help you
- Further research is available on request – please get in touch
- tourismresearch@gov.wales
- Thank you

