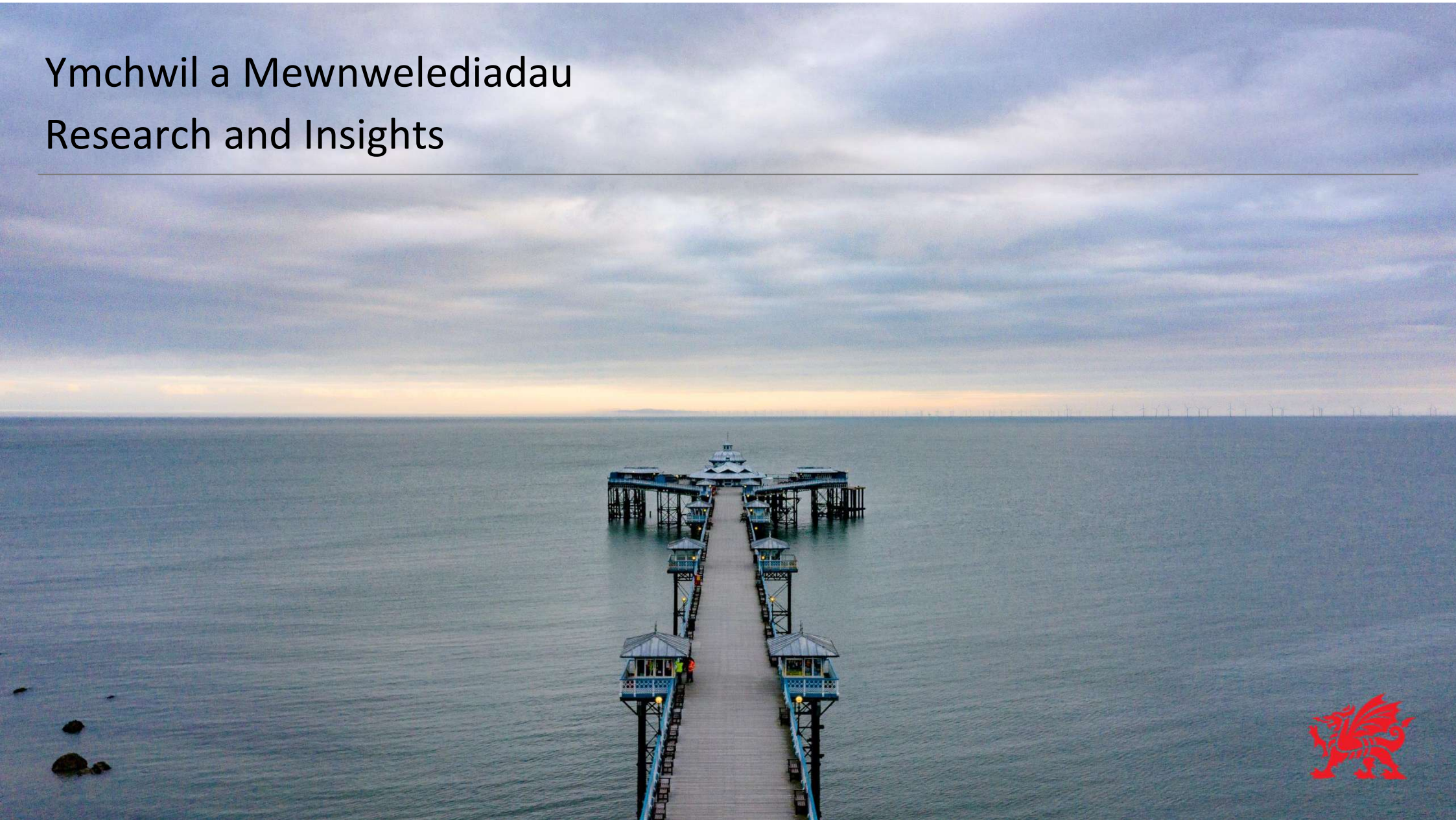


# Ymchwil a Mewnwelediadau

## Research and Insights

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## Beth fyddwn ni'n ei drafod heddiw

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- 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

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



## Galw ac Ymchwil i'r Farchnad

- 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

## Demand & Market Research

- Information to understand underlying market and demand conditions
- 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

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Deall, rhagweld a mesur effeithiau twristiaeth

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

## Planning and Performance

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To understand, predict and measure the impacts of tourism

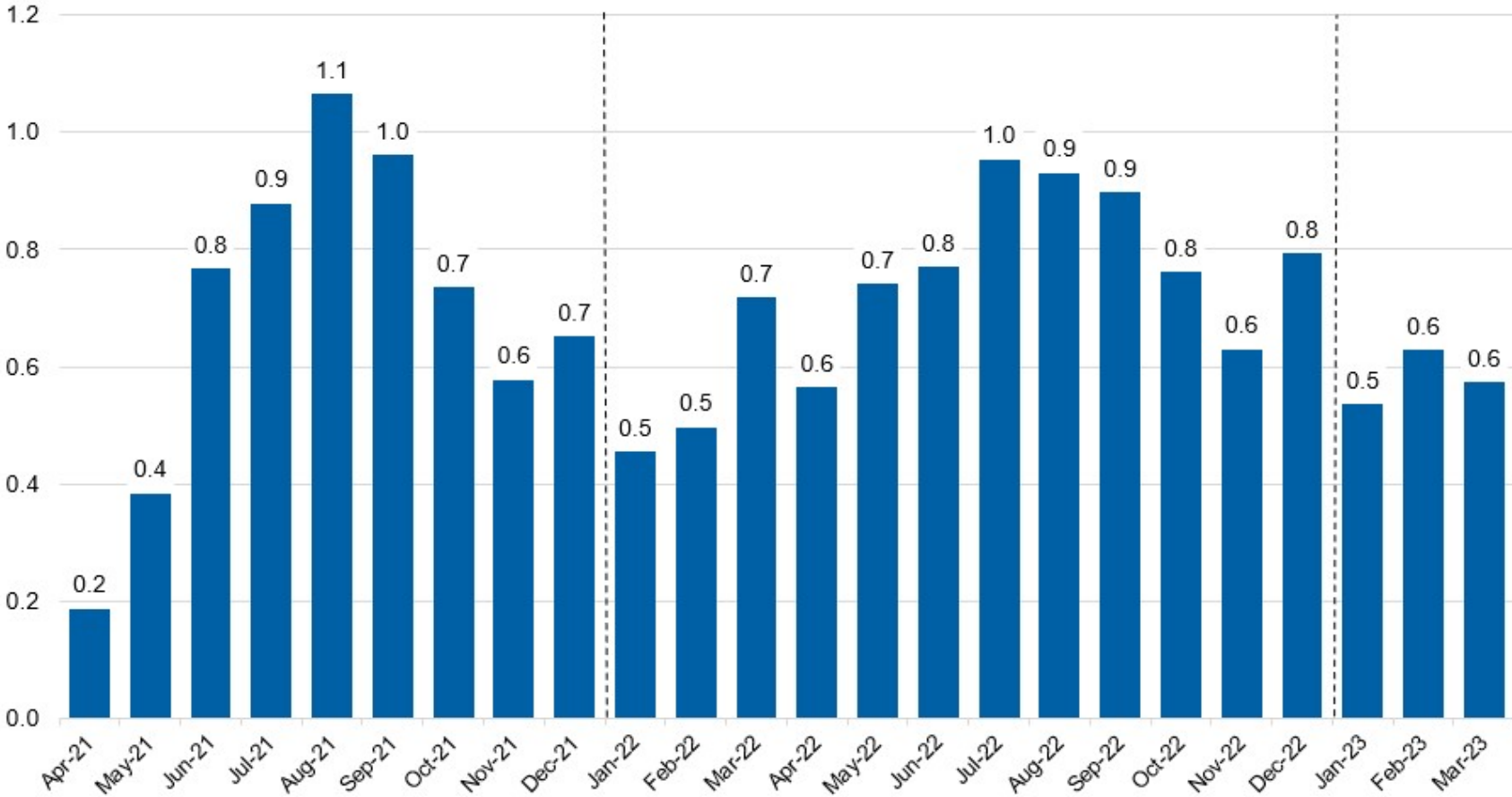
- Economic, social and environmental impacts
- Residents Survey Pilot in 3 Local Authorities
- Evaluation of investments



# 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

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—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

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

### Domestic overnight trips: trip types

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



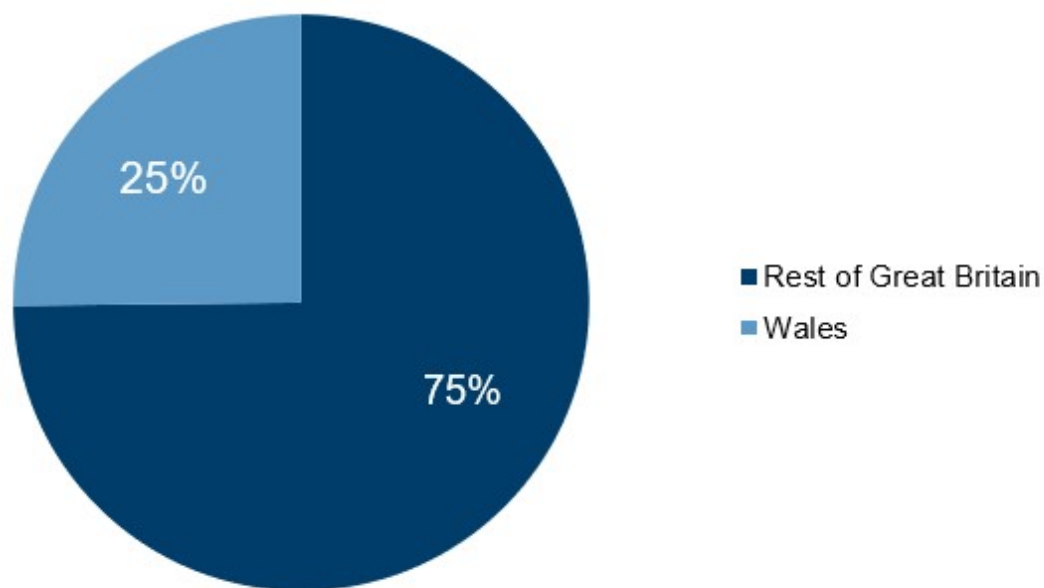
# Teithiau dros nos domestig: proffil ymwelwyr ar gyfer 2022

## Domestic overnight trips: visitor profile for 2022

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

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



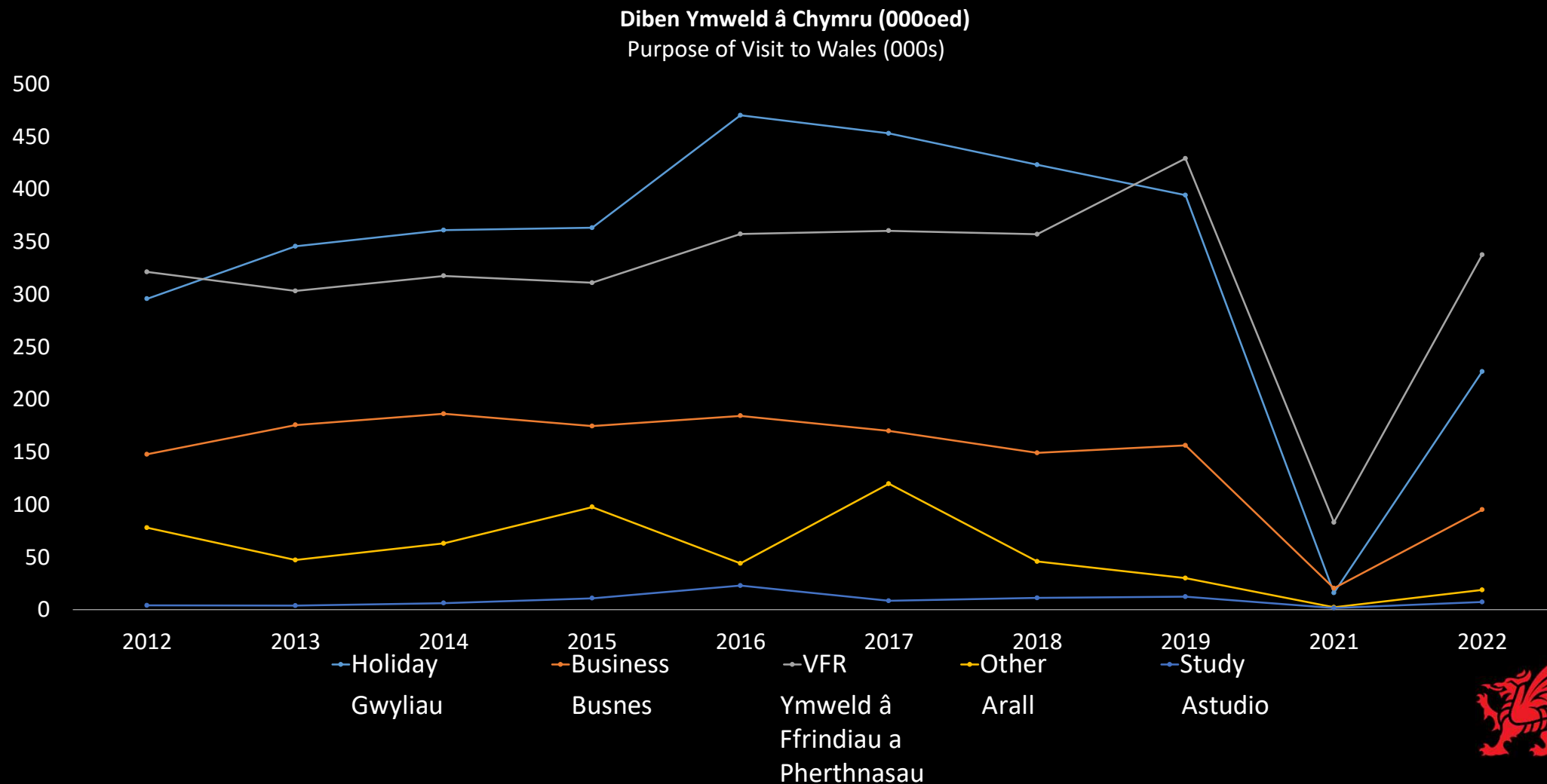
- Gwlad enedigol
- Oedran
- Maint y parti
- Plant

- Home region
- Age
- Party size
- Children accompanying



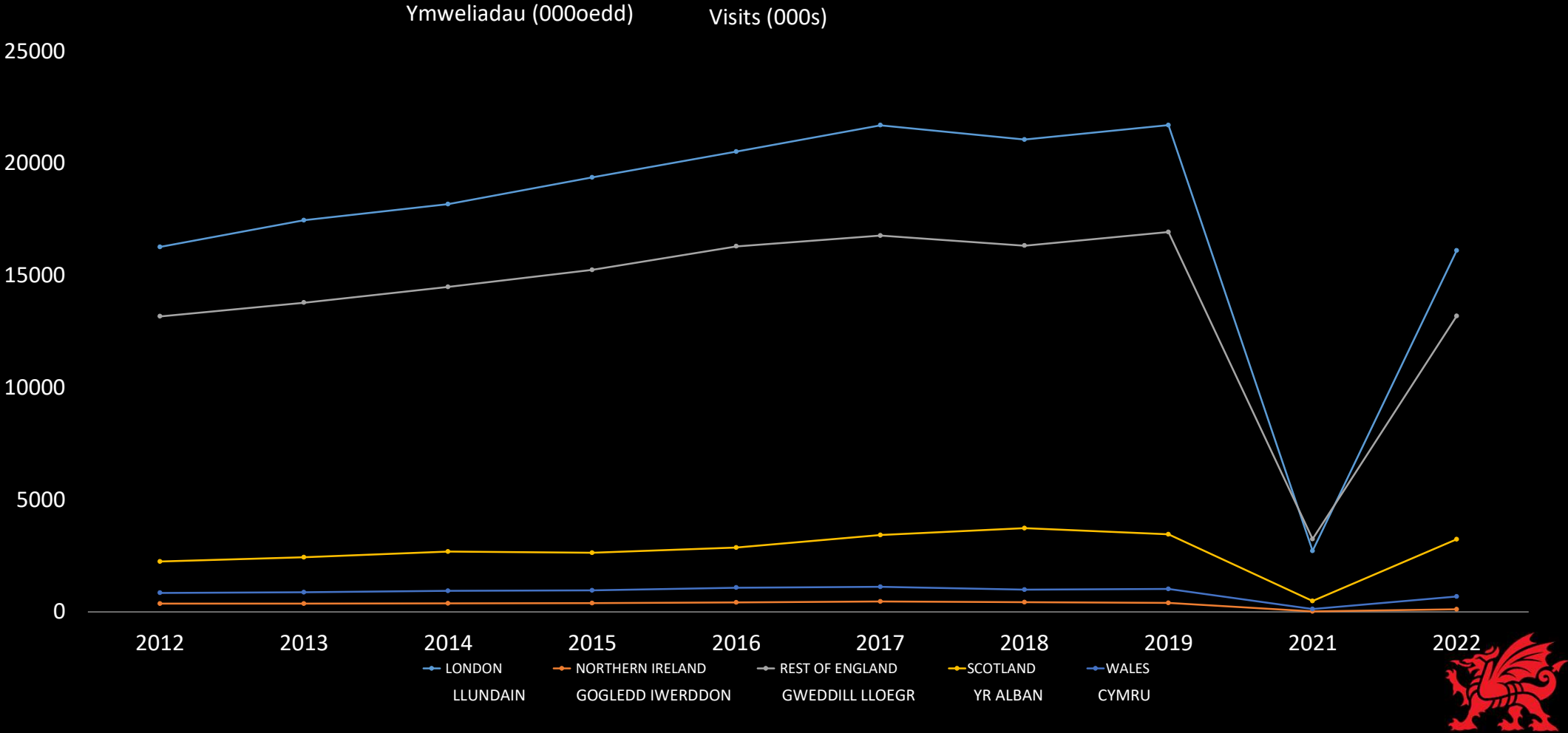
# IPS – Pwrpas Ymweld â Chymru

## IPS – Purpose of Visit to Wales



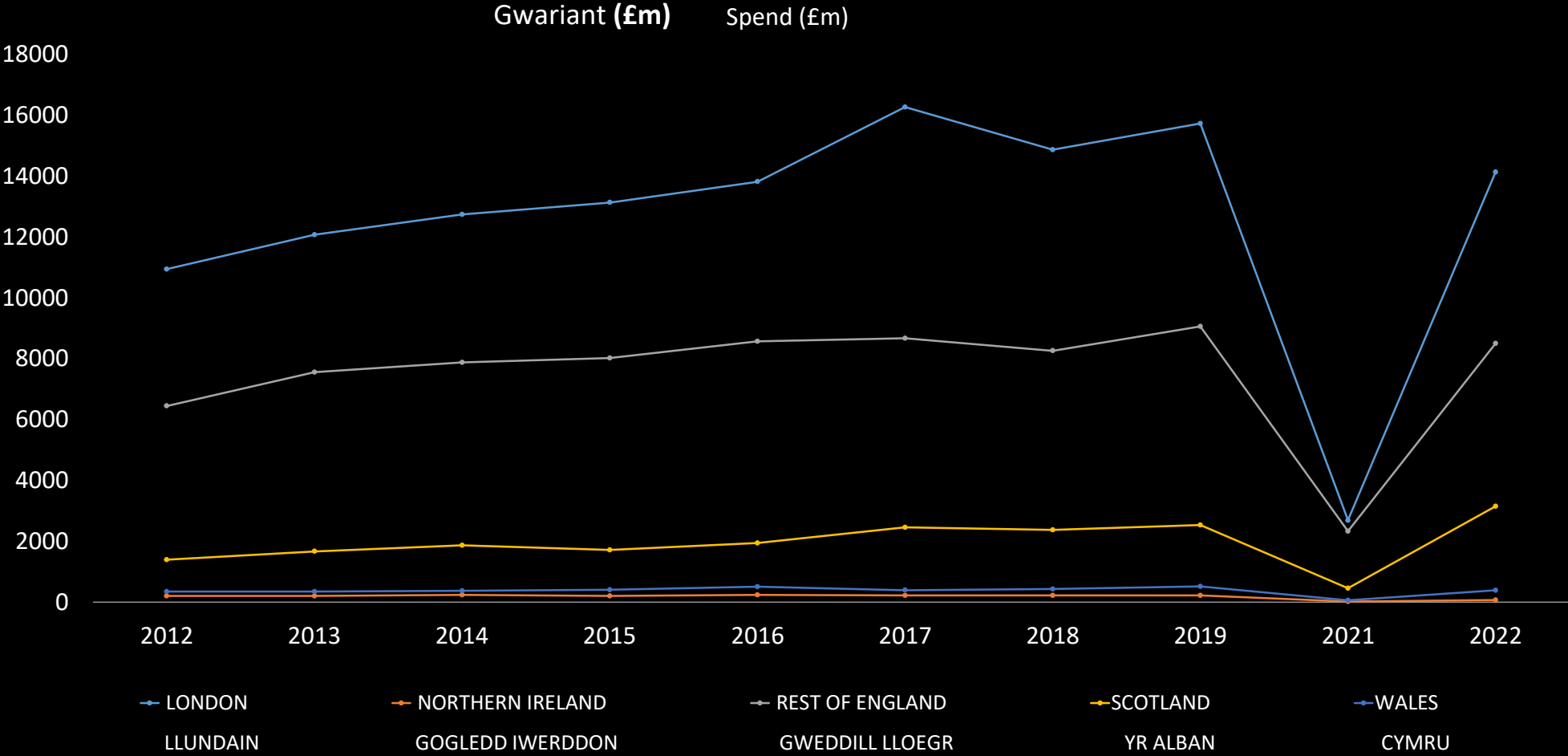
# IPS - Cymharu Ymweliadau â Gwledydd y DU

## IPS – Visits Comparison with UK Nations



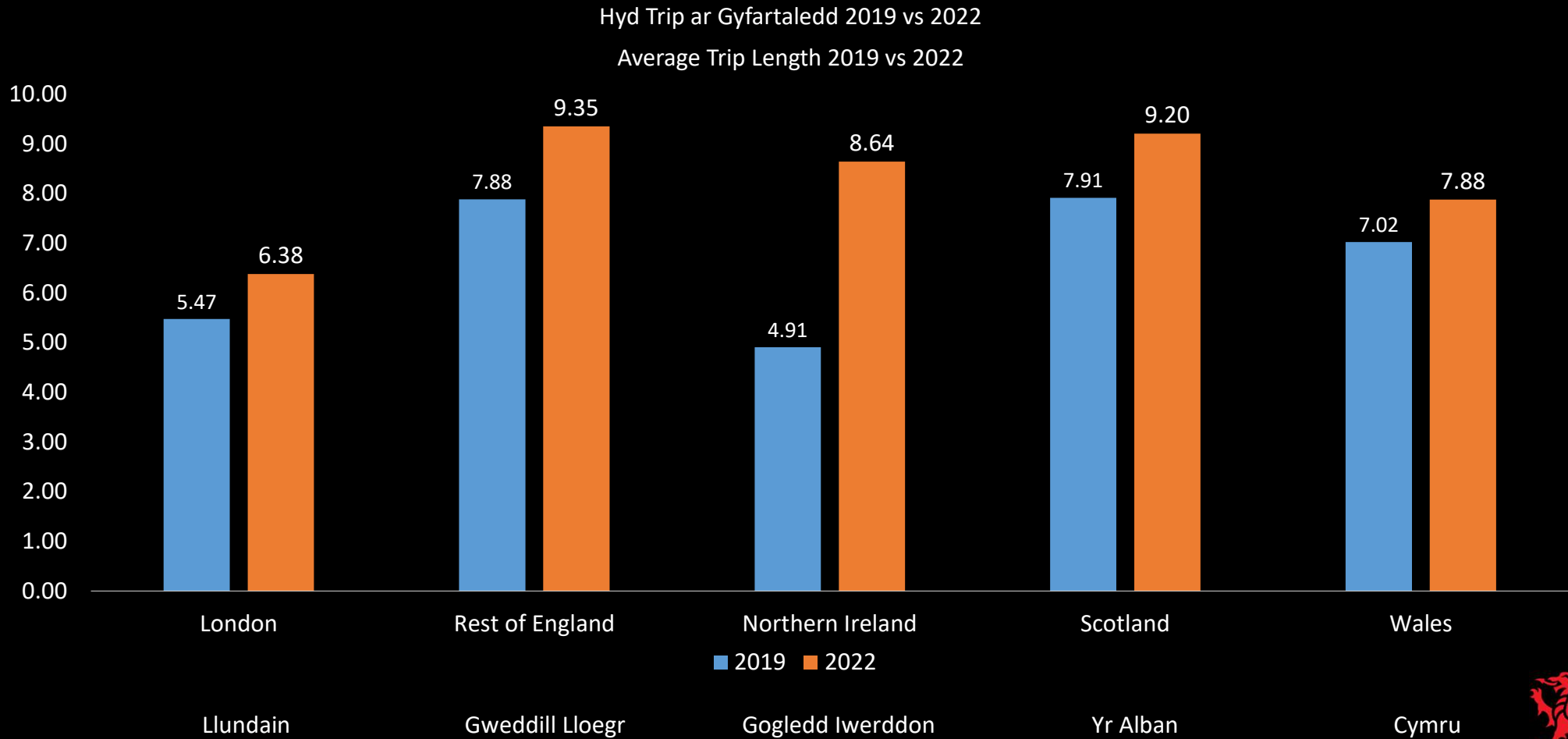
# IPS – Gwariant

# 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%
Rweddill Lloegr	3.1m	-6%	84%
Yr Alban	572,000	29%	125%
Cymru	151,000	-4%	107%
Cyfanswm	7.7m	-8%	105%





## Y De-ddwyrain - 2022

### South East – 2022

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- 2.65 o deithiau domestig
- £556m o wariant domestig
- 314,000 o ymwelwyr rhyngwladol
- £183m o wariant rhyngwladol

- 2.65 domestic trips (highest in Wales)
- £556m domestic spend
- 314,000 international visits
- £183m international spend



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

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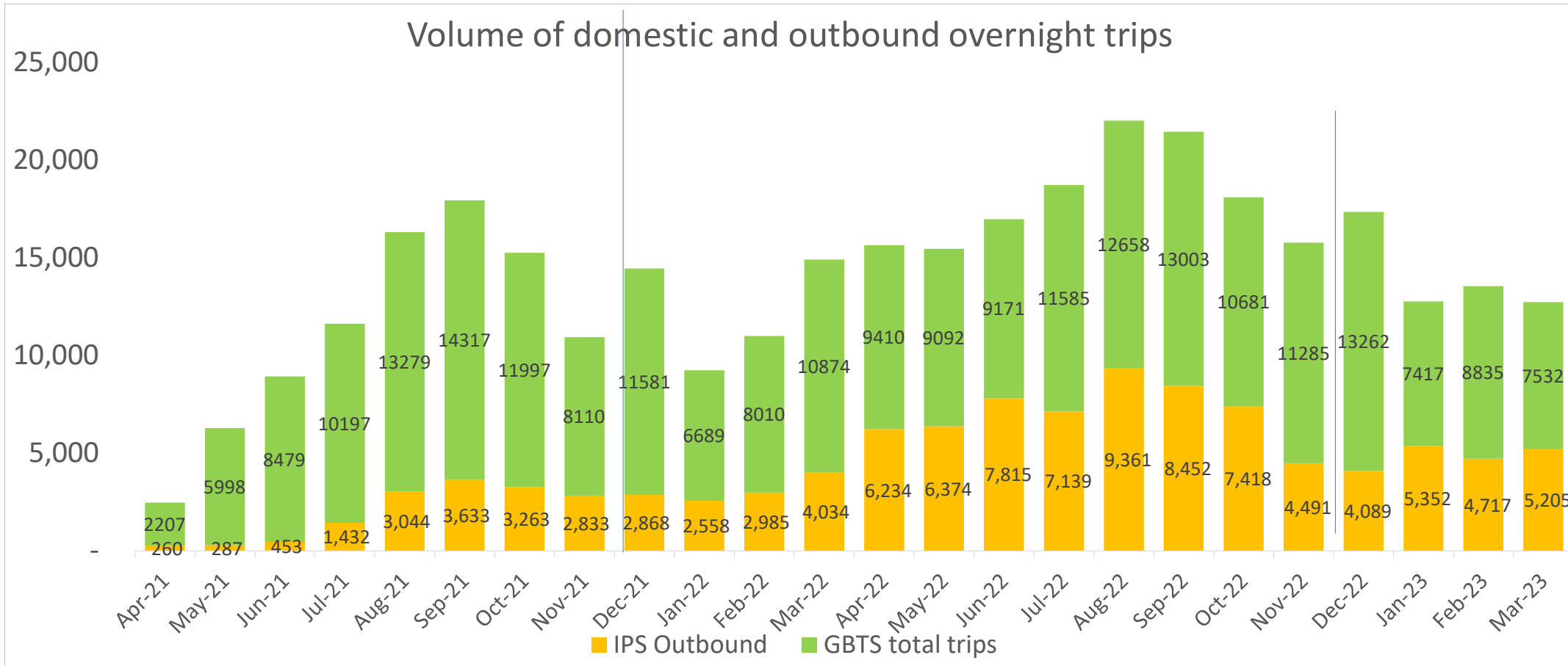
- 62.0 miliwn o deithiau dydd twristiaeth i Gymru – 6% o deithiau dydd domestig ym Mhrydain Fawr
- £2.37 biliwn wedi'i wario - 5% o'r gwariant ar deithiau dydd domestig ym Mhrydain
- Y tri gweithgaredd uchaf:
  1. Ymweld â ffrindiau a pherthnasau
  2. Mynd i atyniad i ymwelwyr
  3. Bwyd a diod, noson allan neu siopa arbenigol

- 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 Teimpladau Domestig

## Domestic Sentiment Tracker

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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 mewnwelediadau 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](mailto: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](mailto:tourismresearch@gov.wales)
- Thank you

