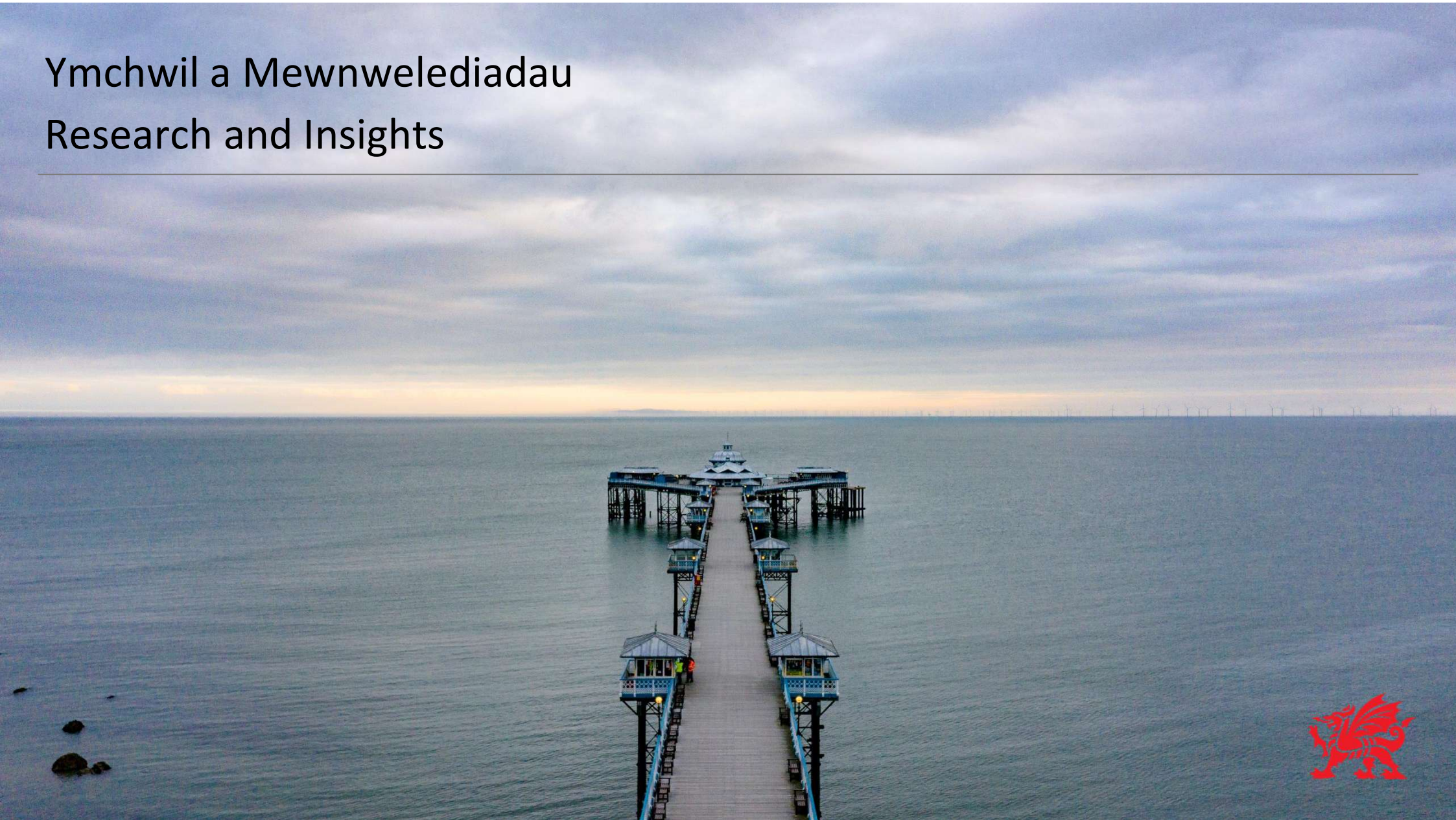


Ymchwil a Mewnwelediadau

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 Twristiaeth Prydain Fawr
- Arolwg Ymweliadau Dydd Prydain Fawr
- Arolwg Teithwyr Rhyngwladol
- 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
- Great Britain Tourism Survey
- Great Britain Day Visits Survey
- International Passenger 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 2022: gwerth a hyd

Domestic overnight trips 2022: value and duration

—DU, 2022: £32.88 biliwn

—Cymru 2022. £1.92 biliwn

—6% o'r gwariant

—Cymru 8.71 miliwn o deithiau

—3.0 noson fesul taith

—GB, 2022: £32.88 billion

—Wales 2022: £1.92 billion

—6% of expenditure

—Wales 8.71 million trips

—3.0 nights per trip

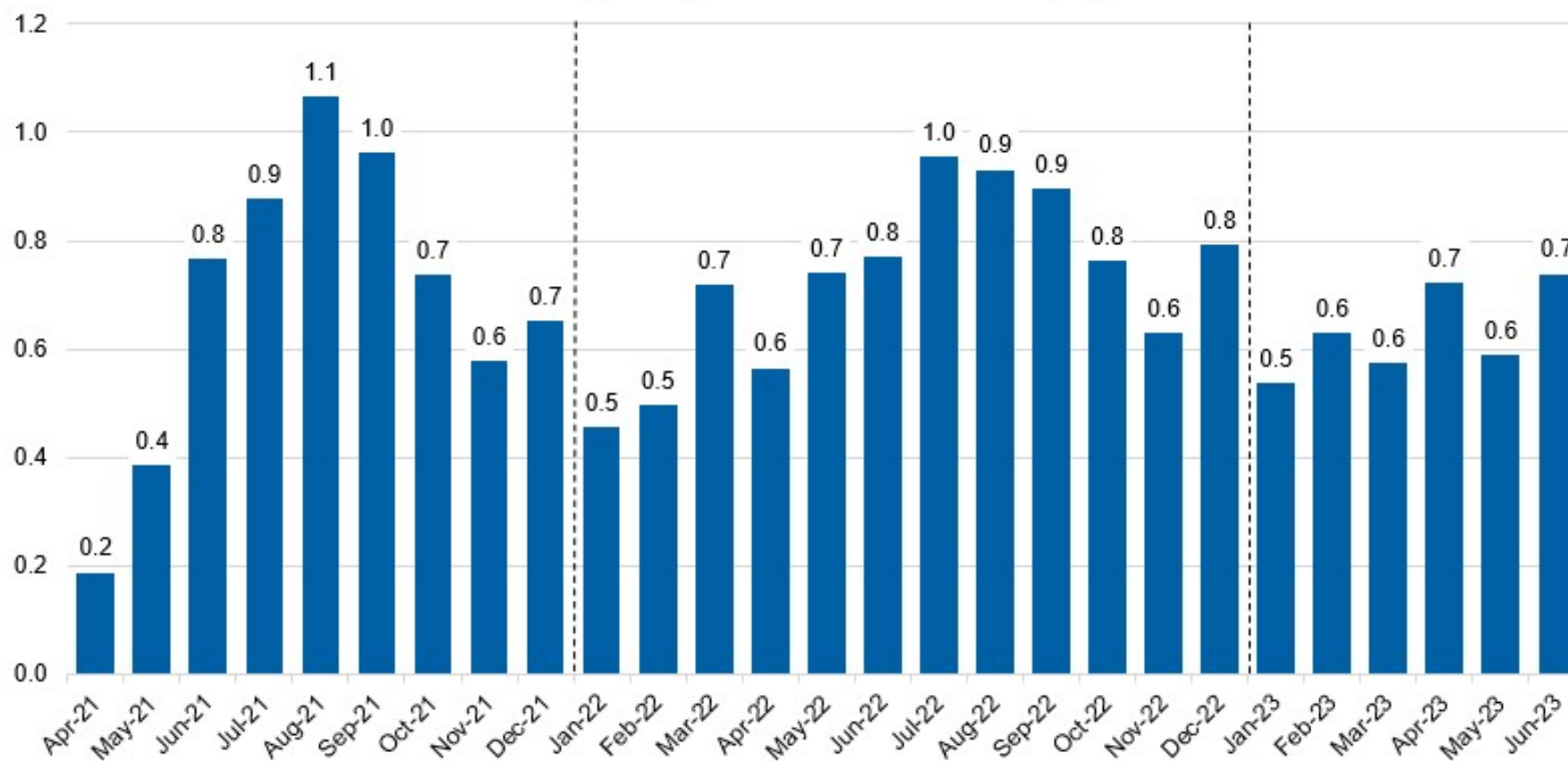


Teithiau dros nos domestig - nifer

Domestic overnight trips – volume

Cyfanswm y teithiau domestig dros nos i Gymru mewn miliynau, Ebrill 2021 i Fehefin 2023

Volume of domestic overnight trips to Wales in millions, April 2021 to June 2023



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

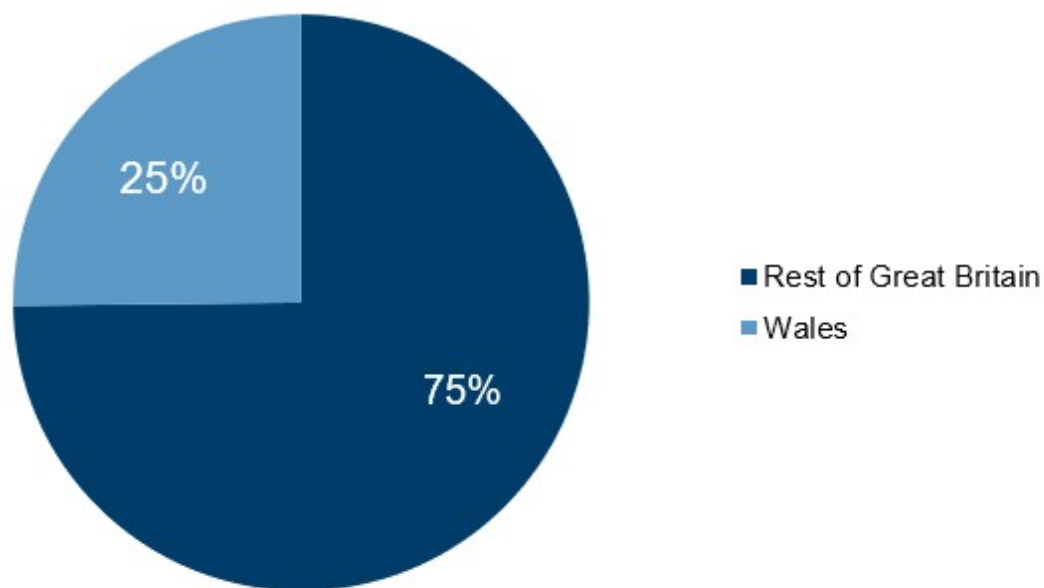


Teithiau dros nos domestig: proffil ymwelwyr ar gyfer 2022

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

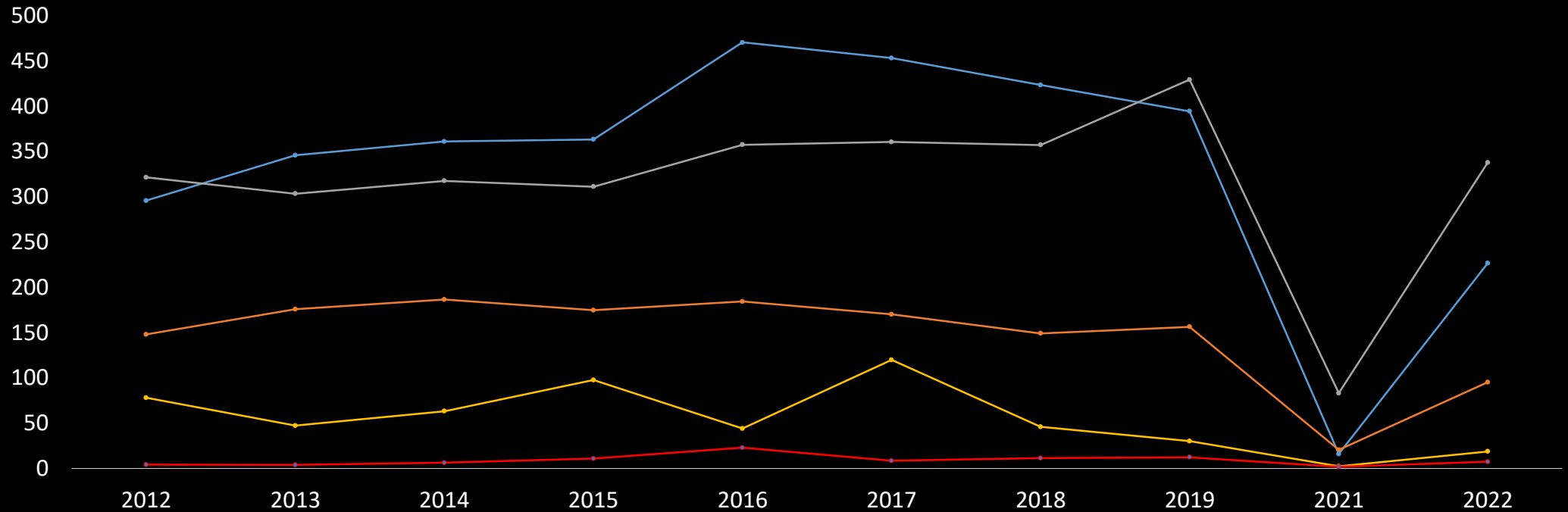


Ymwelwyr rhyngwladol – Pwrpas Ymweld â Chymru

International Visitors – Purpose of Visit to Wales

Diben Ymweld â Chymru (000oed)

Purpose of Visit to Wales (000s)



— Holiday
Gwyliau

— Business
Busnes

— VFR
Ymweld â
Ffrindiau a
Pherthnasau

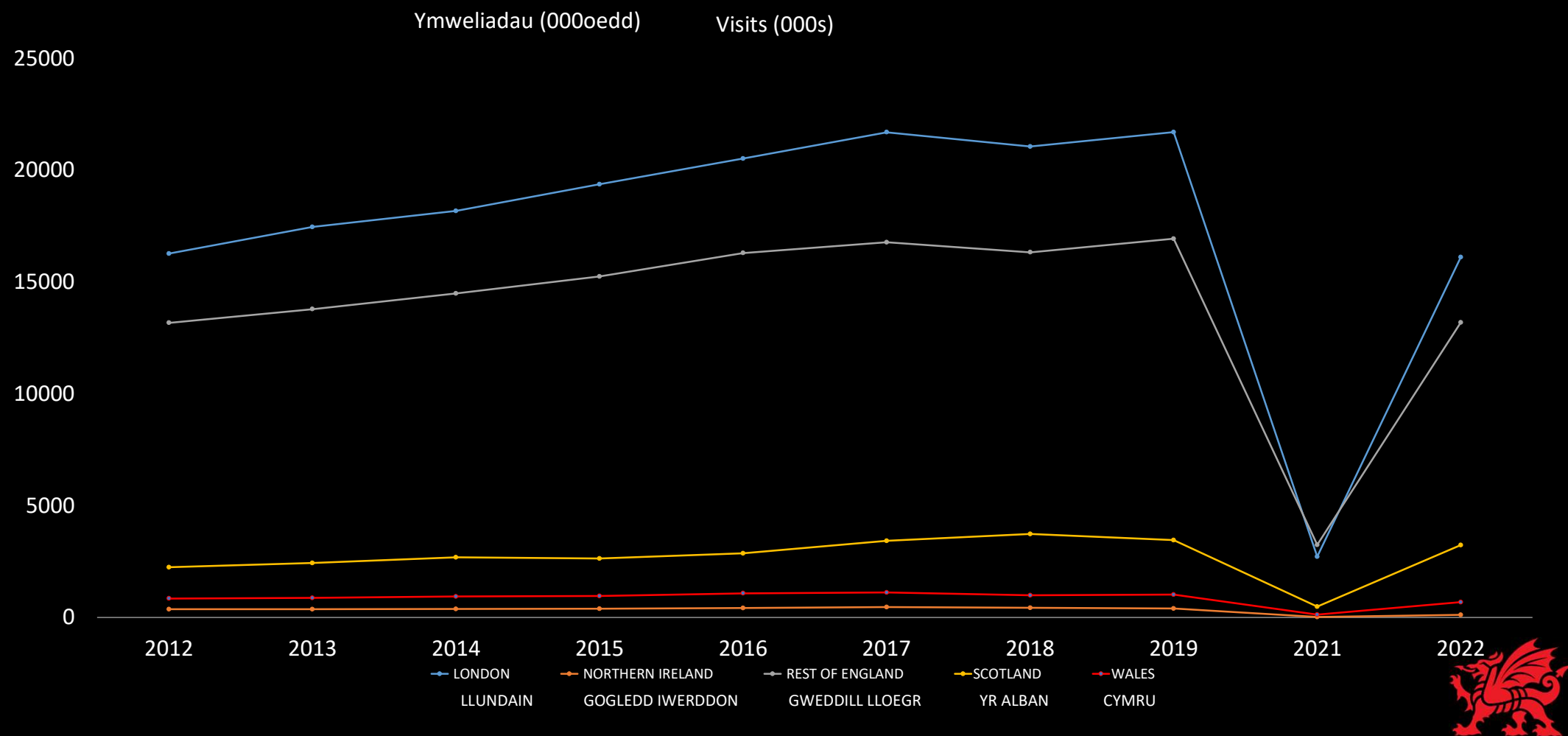
— Other
Arall

— Study
Astudio



Cymharu Ymweliadau â Gwledydd y DU

Visits Comparison with UK Nations



Ymwelwyr rhyngwladol 2023 - Hyd yma

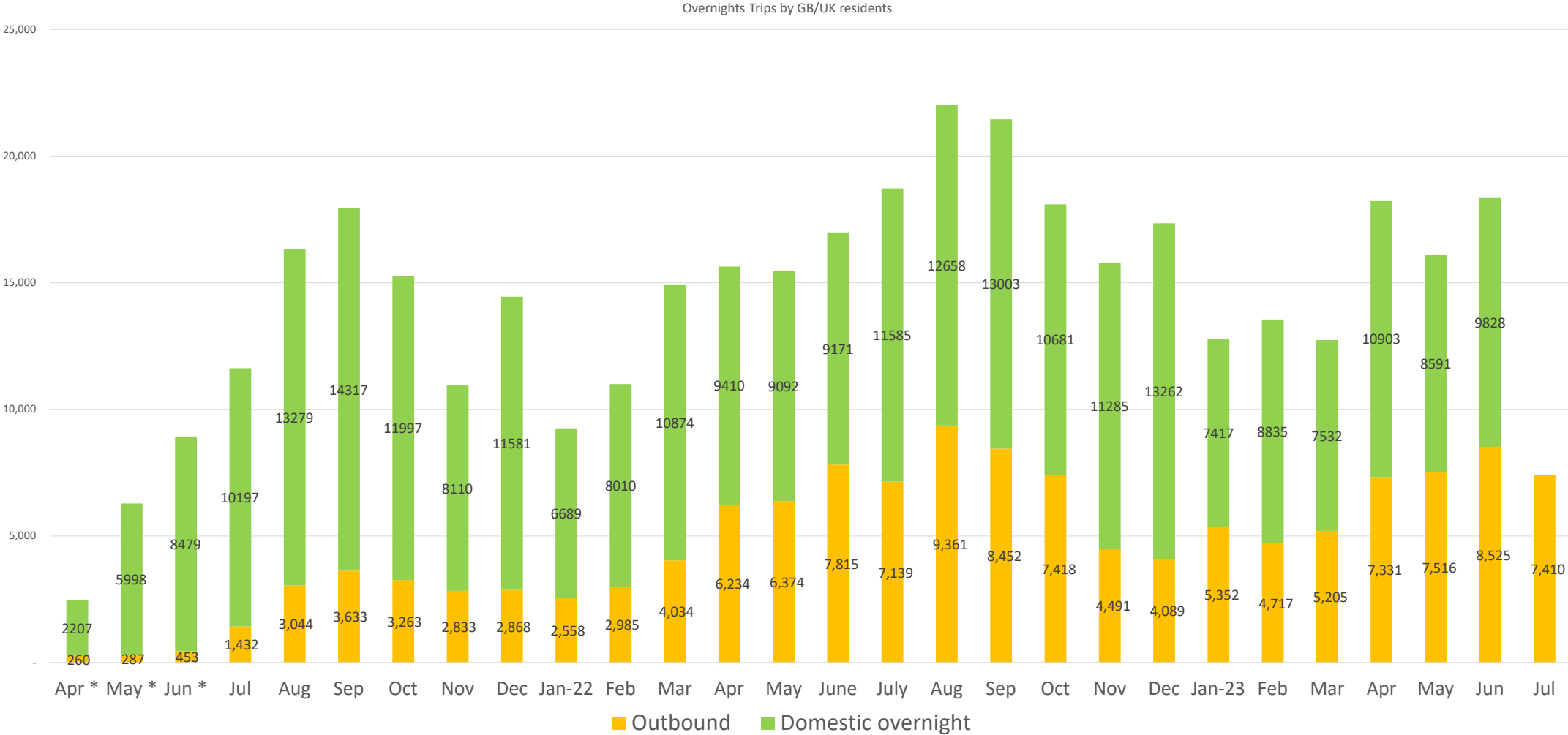
International Visitors: 2023 So Far

Visits	Q2 2023	% Change vs Q2 2019	%Change vs YTD 2019
Total England	8.6m	-5%	-6%
London	5.3m	-1%	-4%
Rest of England	3.8m	-11%	-9%
Scotland	1.1m	27%	28%
Wales	252,000	-17%	-12%
Total UK	9.8m	-5%	-6%

Ymweliadau	Q2 2023	% newid vs Q2 2019	%newid vs Y flwyddyn hyd yma 2019
Cyfanswm Lloegr	8.6m	-5%	-6%
Llundain	5.3m	-1%	-4%
Gweddill Lloegr	3.8m	-11%	-9%
Yr Alban	1.1m	27%	28%
Cymru	252,000	-17%	-12%
Cyfanswm	9.8m	-5%	-6%

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 78% yn bwriadu mynd ar daith dros nos yn y DU yn ystod y 12 mis nesaf

Mae 62% 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

78% intend to take an overnight UK trip in the next 12 months

60% intend to take an overnight overseas trip in the next 12 months



De-orllewin Cymru – 2022

- 1.77m o deithiau domestig
- £440m o wariant domestig
- 151,000 o ymwelwyr rhyngwladol
- £75m o wariant rhyngwladol

South West Wales – 2022

- 1.77m domestic trips taken
- £440m domestic spend
- 151,000 international visitors
- £75m international spend



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
- 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

