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# UKinbound

## Visit Wales Update

### 27<sup>th</sup> April 2023

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#### Visit Wales

- Clare Dwight - Senior Tourism B2B Marketing Manager
- Judith Newton – Marketing Manager – Multi Market
- Stephen Nase – Director of Marketing, North America
- Hannah Thomas – Marketing Executive, North America

#### The Royal Mint

- Paul Brandwood – Business Development Manager

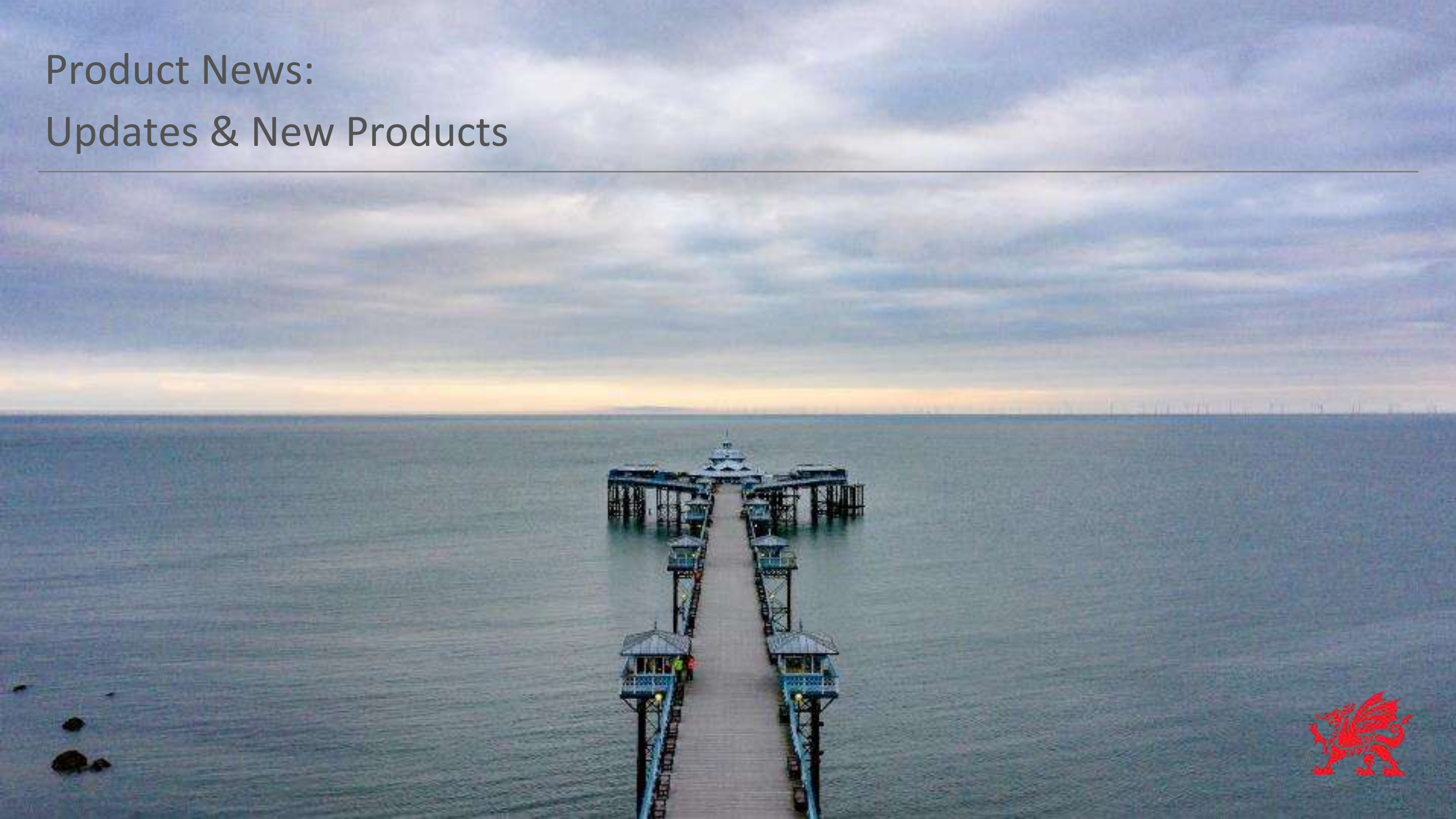


This is Wales.



# Product News: Updates & New Products

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# Bannau Brycheiniog National Park



# Daily flights between Paris-Orly and Cardiff



- From 21<sup>st</sup> April 2023, daily flights are reinstated between Paris-Orly and Cardiff.
- Offered by Air France they will be operated Eastern Airways.
- Arrival time into Cardiff is 14.20 apart from Saturday (14:30).
- One-way fares, including taxes and charges are from £69.99.

Plus

- 22/9/23 Lyon to Cardiff and return 25/9/23.
- 6/10/23 Nantes to Cardiff and return 8/10/23.
- Flights will be operated by [Volotea](#).

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# GWR to extend rail services to west Wales

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- From 1<sup>st</sup> May 2023 services to Carmarthen will increase from 1 to 6 direct trains a day (3 on Sunday).
- Direct service from London to Llanelli, Pembrey & Burry Port and Carmarthen (and vice versa).
- GWR's Summer Saturday London - Pembroke Dock service & also calling at Tenby. This service will only run from 27 May until 9 September '23.
- Prices start from £32.



# From Rail to Trail



Robert Mann MA Photography

- As part of Llwybrau. Wales, by Trails. Transport for Wales is developing a series of trails.
- They are encouraging passengers to arrive by train and explore by foot.
- Many itineraries also link to The Wales Coast Path and UNESCO World Heritage Sites.
- A range of regional passes are available.



# Penderyn Distillery, Swansea

- Penderyn Distillery is planning to open their third distillery in 2023.
- Their unique distillery and bottling plant are due to open at the The Hafod-Morfa Copperworks in Swansea as part of a landmark £1 billion transformation program.
- All distilleries offer a visitor centre, shop, behind the scenes tours and masterclasses.
- Penderyn continues to enjoy huge success. As well as the company's expansion, Penderyn and its sister brand, Siddiqui Rums, have continued to gather international spirits awards.



Artist's impression, subject to change

GWP Architecture 



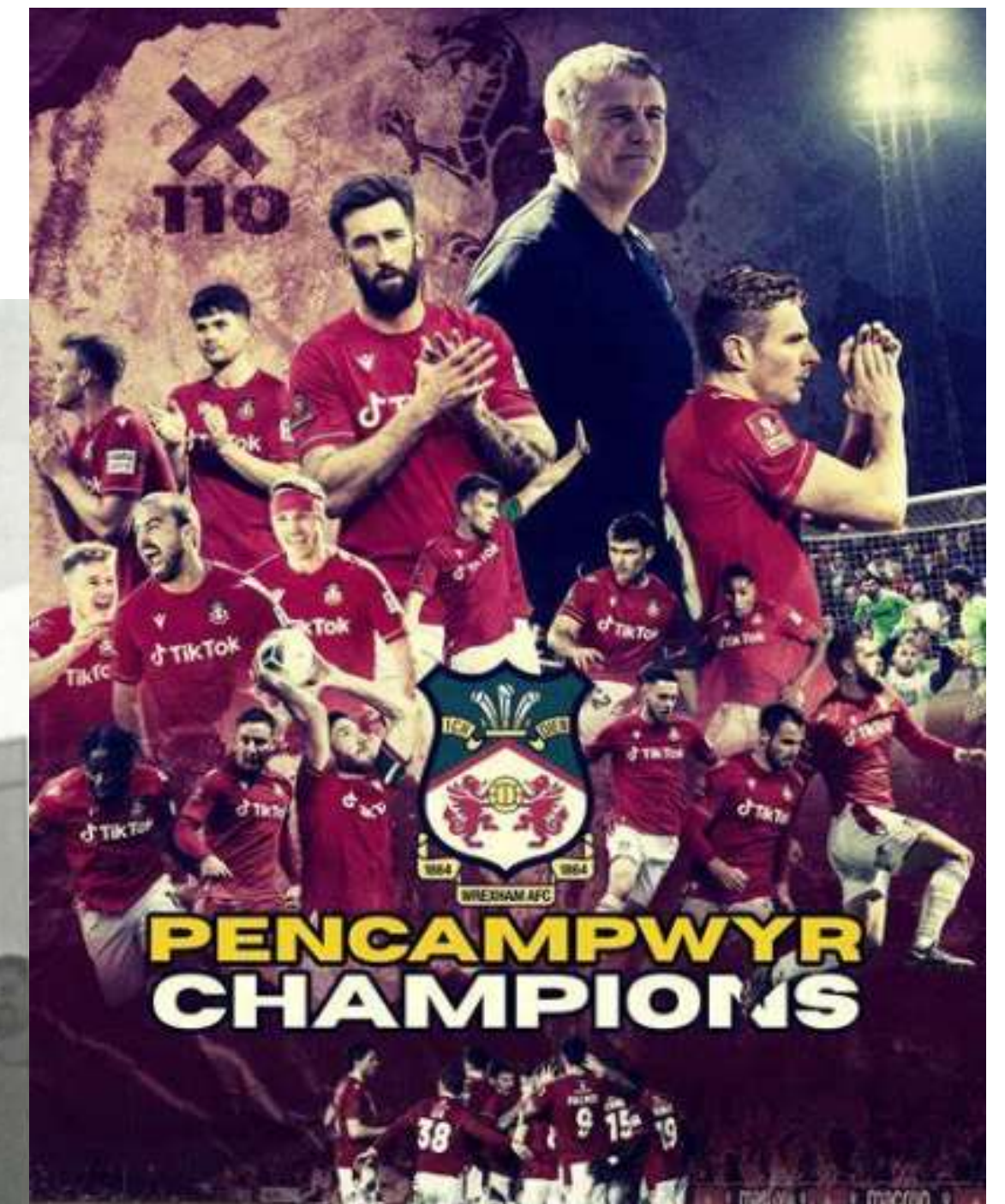
# Seaweed Bathing – Halen Môn, Anglesey

- Halen Môn are offering traditional seaweed baths.
- Your clients can soak in fresh (cleaned!) seaweed and warm water, in their own upcycled whiskey barrel whilst enjoying wonderful views across the Menai Straits.
- They use the pure water generated as a by-product of their sea salt harvesting process.
- Travel Trade rates are available to include a seaweed bath and tour of the salt cote.



# Wrexham & Football Museum for Wales

- Wrexham AFC promoted to Football League.
- The development will house the Football Museum and Wrexham Museum.
- It is already home to the official Welsh Football Collection.
- It will be a major new national attraction for the city centre.



# Wales in North America



# Strategic Context



# Strategic context.

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## **Welcome to Wales: priorities for the visitor economy 2020-2025.**

Still provides strong foundations for the sector and a clear sense of direction for mid to longer-term recovery.

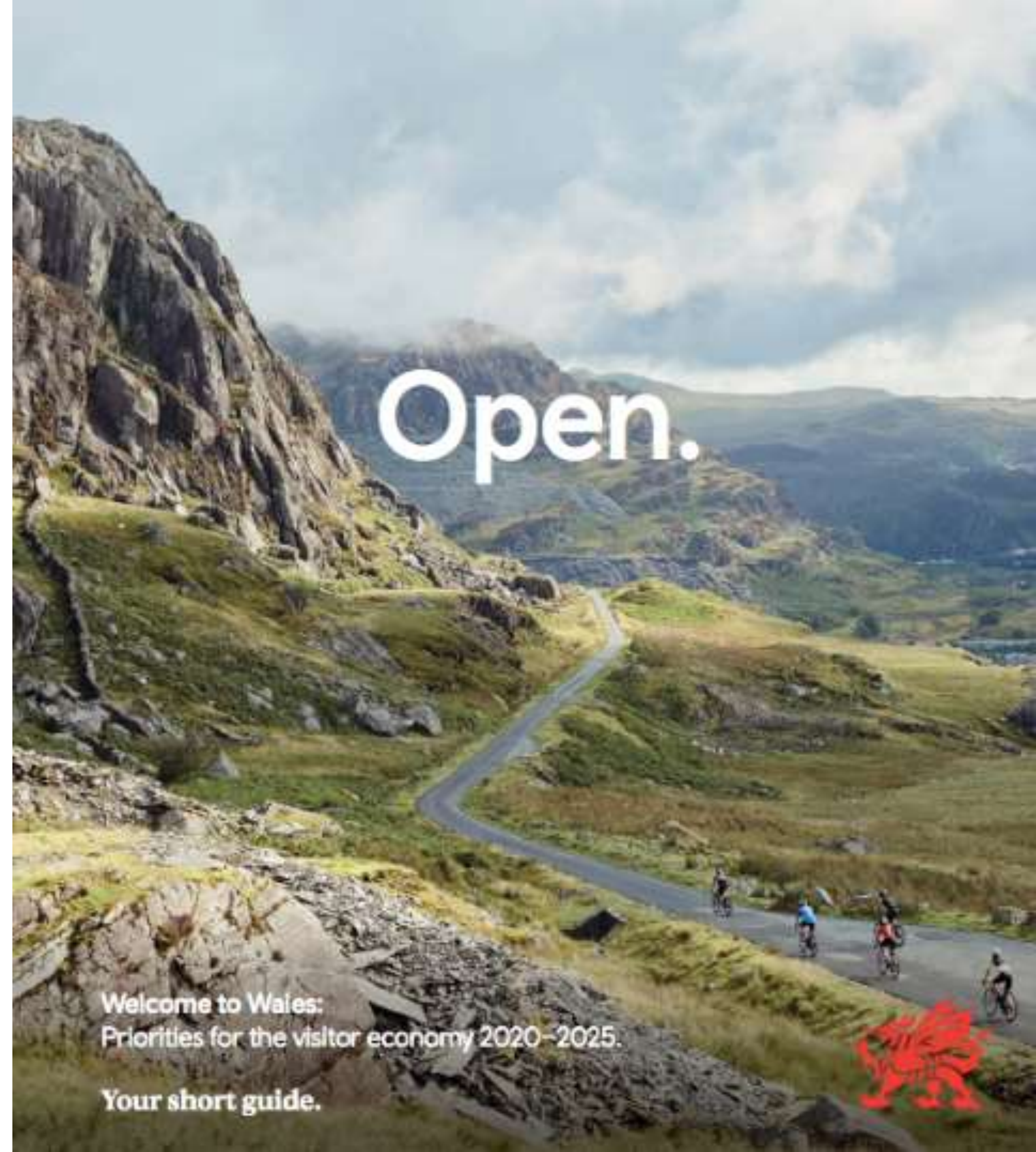
### **Tourism that does good.**

Tourism that supports our communities and cares for our land.

That's mutually beneficial to visitors and citizens.

And that provides year-round sustainable jobs in all parts of our country.

[Welcome to Wales: priorities for the visitor economy 2020 to 2025 | GOV.WALES](#)



# Focus.

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Seasonality.

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Extending the  
traditional  
season.

Spend.

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Value over  
volume.

Spread.

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Spreading the  
benefit.



# Nation Brand.

- The overarching *Cymru Wales* nation brand aims to inspire audiences around the world to choose Wales as a place to visit, work, invest, live and study
- International campaigns showcase Wales as a globally responsible nation
- A strong focus on elevating people, with product and place as supporting cast



Research.





# Top 10 countries of origin of International Visitors by volume of trips (thousands) to Wales – Three Year Average 2017-2019

Wales				
<b>All Visits</b>	<b>1,041</b>		<b>All Visits</b>	<b>100%</b>
Ireland	164		Ireland	16%
USA	108		USA	10%
Germany	80		Germany	8%
France	73		Australia	7%
Netherlands	58		Netherlands	6%
Australia	53		Poland	5%
Spain	47		France	4%
Italy	41		Spain	4%
Poland	36		Switzerland	3%
Canada	31		Canada	3%

*\*Source: IPS 2017-2019*



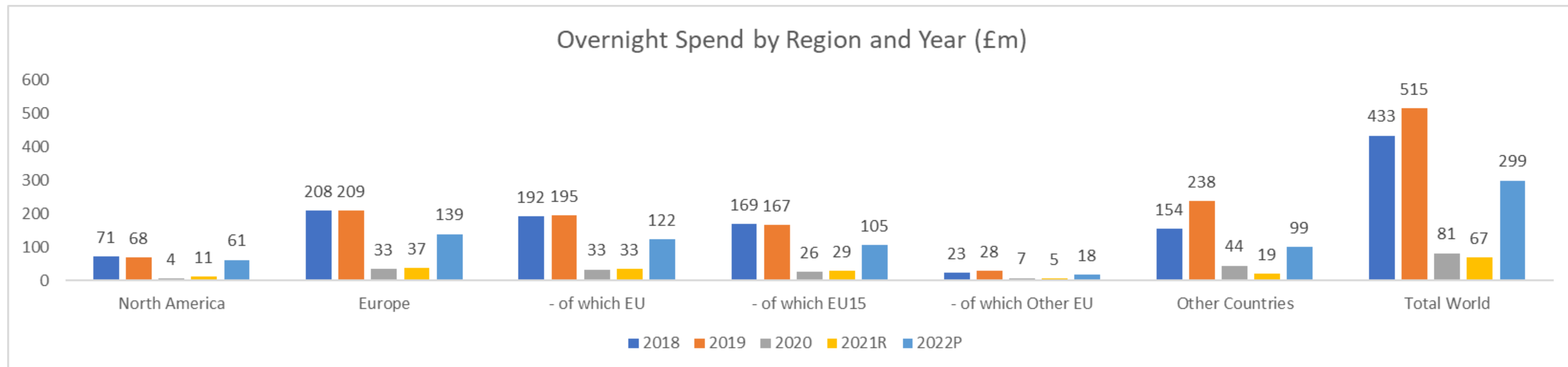
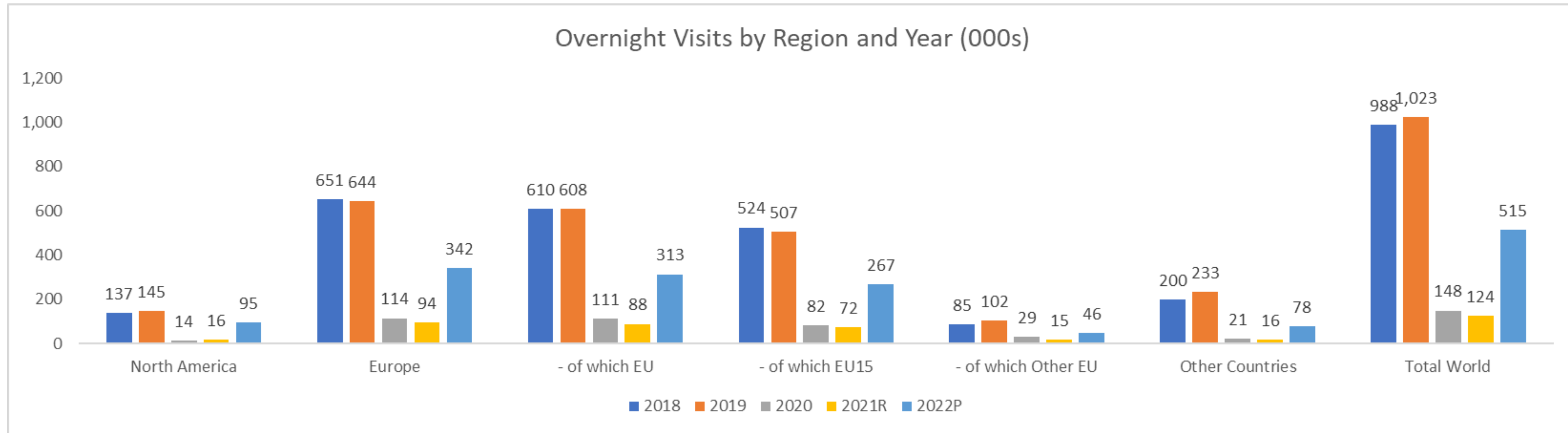
## Top countries of origin of International Visitors by spend (£ millions) to Wales – Three Year Average 2017-2019

Wales				
All markets	448.4			
USA	51.9		USA	12%
Irish Republic	37.2		Irish Republic	8%
Germany	32.9		Germany	7%
Australia	30.3		Australia	7%
France	21.7		France	5%
Netherlands	17.5		Netherlands	4%
Spain	15.4		Spain	3%

*\*Source: IPS 2017-2019*



# Wales Market Data 2018-2022 (\*2022 excludes Q4)



# Wales International Visitors and Spend 2018-2022\* (\*2022 excl. Q4)

## Visitors (000s)

	2018	2019	2020	2021	2022P	% of 2022 vs 2019
<b>North America</b>	137	145	14	16	95	-35%
<b>Europe</b>	651	644	114	94	342	-47%
- of which EU	610	608	111	88	313	-49%
- of which EU15	524	507	82	72	267	-47%
- of which Other EU	85	102	29	15	46	-55%
<b>Other Countries</b>	200	233	21	16	78	-67%
<b>Total World</b>	988	1,023	148	124	515	-50%

## Spend (£m)

	2018	2019	2020	2021	2022P	% of 2022 vs 2019
<b>North America</b>	71	68	4	11	61	-11%
<b>Europe</b>	208	209	33	37	139	-34%
- of which EU	192	195	33	33	122	-37%
- of which EU15	169	167	26	29	105	-37%
- of which Other EU	23	28	7	5	18	-37%
<b>Other Countries</b>	154	238	44	19	99	-58%
<b>Total World</b>	433	515	81	67	299	-42%





Market	Sample size
North America	89
UK inbound & domestic	58
UK domestic-only	49
UK inbound-only	43
Dutch-speaking	35

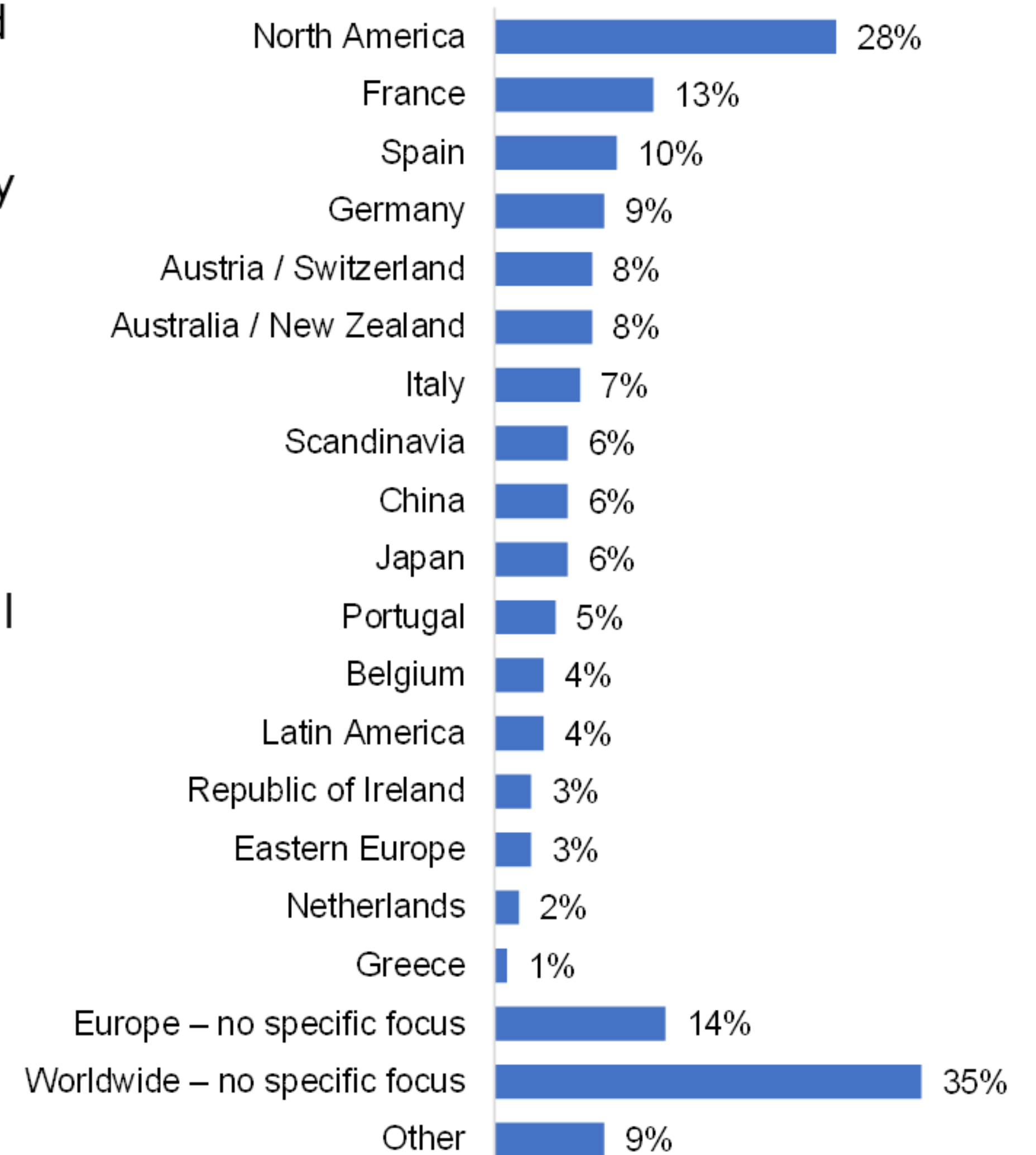
Market	Sample size
German-speaking	33
Republic of Ireland	20
France	12
Japan	6
Others	8

Since pandemic onset, many UK operators now target both inbound and domestic market

## Inbound-only operators have more specific focus

- Inbound-only operators have answered more definitively compared to operators which also target domestic market
- 43% of operators which target both inbound and domestic say they are targeting 'worldwide – no specific focus' and 24% say they are targeting 'Europe – no specific focus'
- This compares to 23% of inbound-only operators targeting 'worldwide – no specific focus' and none answering 'Europe – no specific focus'
- North America stands out as a key market – targeted by 28% of all respondents and 44% of inbound-only operators

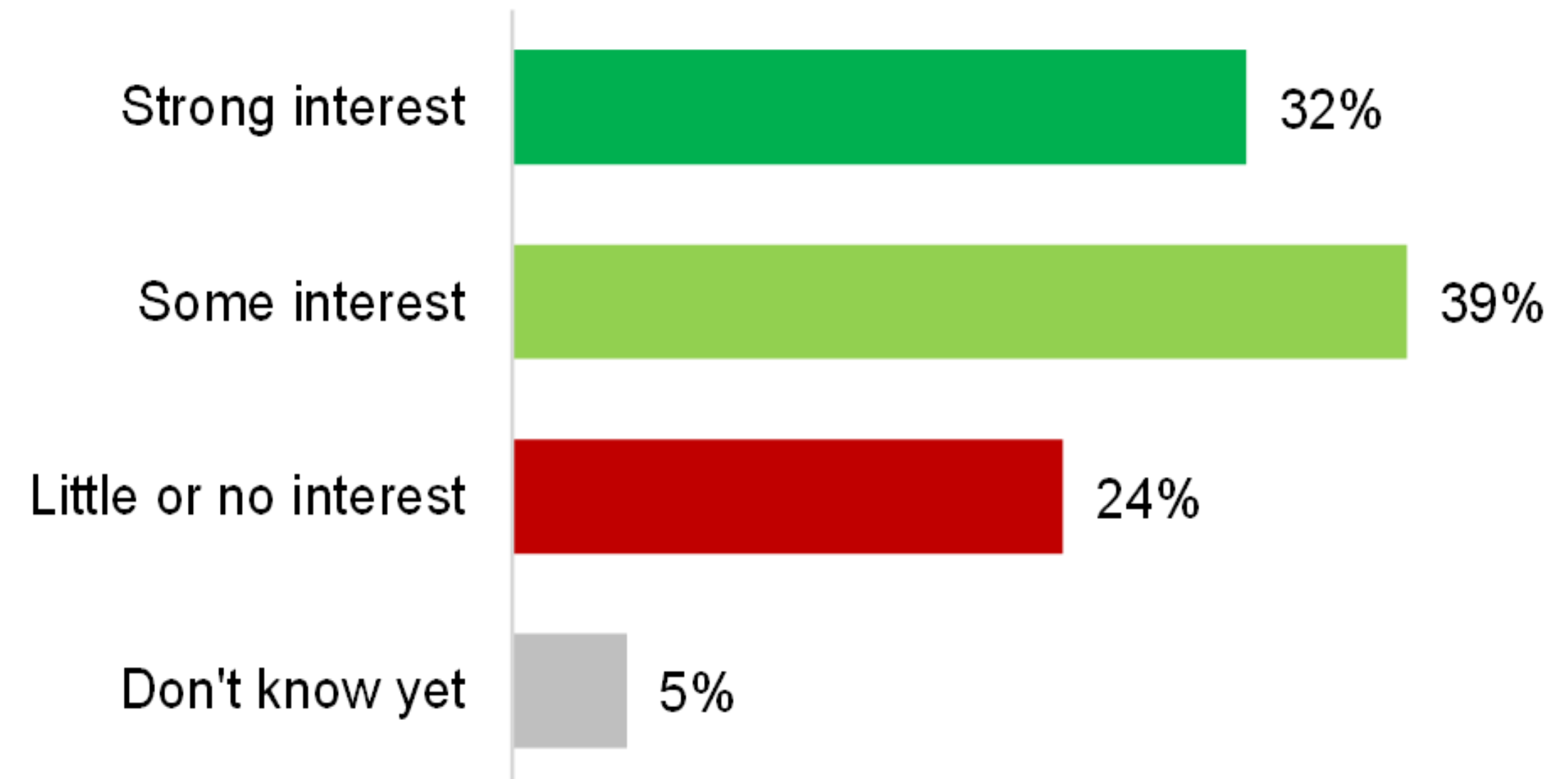
Q2 (UK INBOUND) "Which overseas markets are you particularly active in targeting?" (Unprompted)



## More definite interest compared to previous research

- 71% of operators are interested in developing or selling more Wales products
- More positive than in spring 2022 research, which showed that 57% of overseas operators were interested in Wales 'from 2023 onwards' (now 70% of overseas operators are interested)
- Difference between this year and last year lies in proportion answering 'don't know yet'
- In 2022, industry was still very much in recovery mode
- Proportion expressing interest is higher in following markets:
  - German-speaking (91%)
  - UK domestic-only (84%)
  - North America (79%)

## Q12 "How much interest do you have in developing or selling more Wales products?"

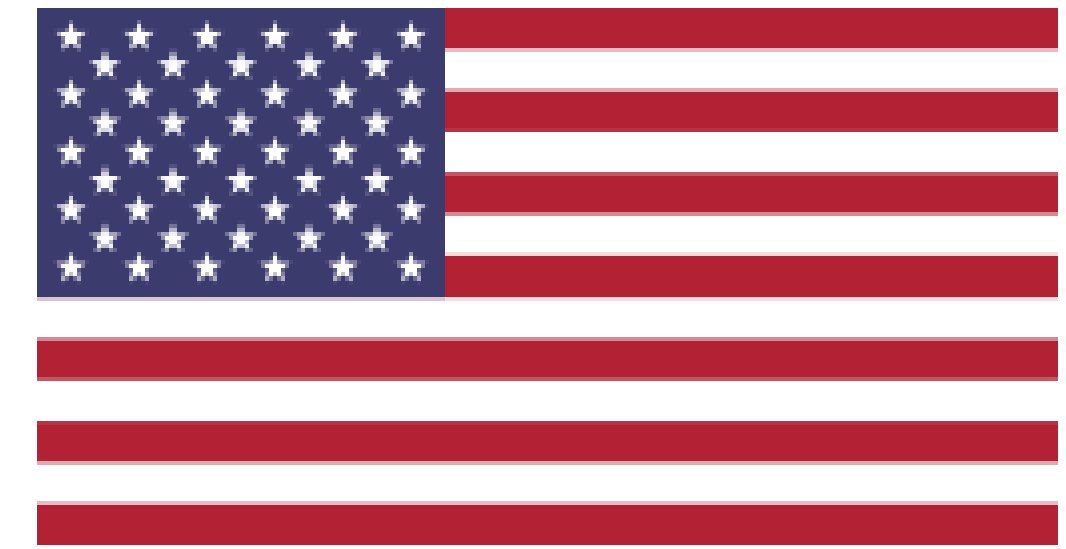




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## Key market focus: North America

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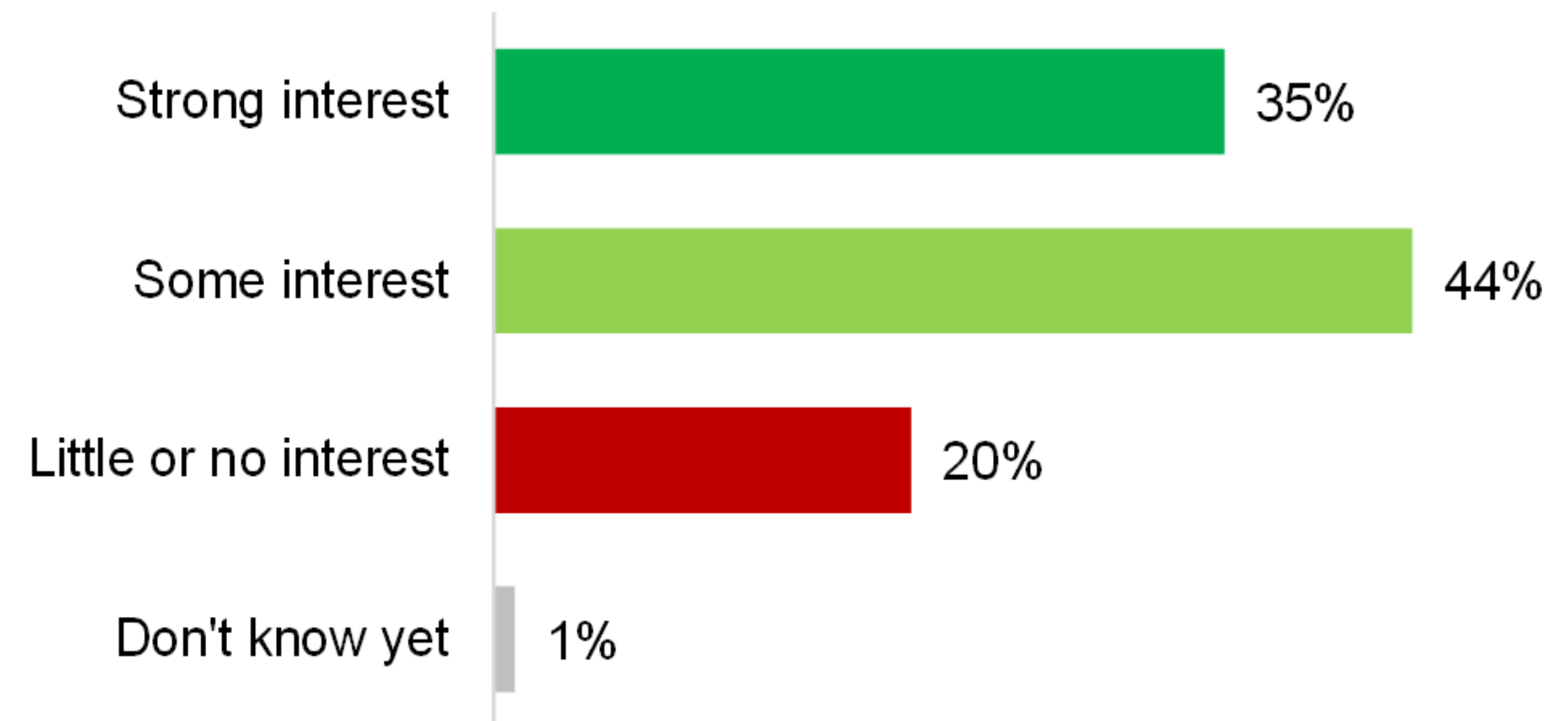
## At least £3.3m estimated value in 2023

- Second most valuable market to Wales
- About half (54%) of operators say they will feature Wales in 2023

## Lots of interest in Wales

- About four in five (79%) North American operators are interested in developing or selling more Wales products

## Q12 "How much interest do you have in developing or selling more Wales products?"



From sample of 89 North America operators

## **Buoyant year for many**

- § A lot of positivity about international travel right now – more so in USA than Canada
- § Many believe Wales can target its fair share of buoyant demand for travel

## **Not all operators have bounced back yet though**

- § More so in Canada than USA
- § Some are still focusing on their domestic market

## **Wales, the hidden gem**

- § Some clients are looking for destinations 'off the beaten track'
- § Wales can meet their criteria

## **Opportunities with history and ancestry**

- § Wales has rich history which can appeal to many North Americans
- § Some also wish to trace their ancestral roots

## **Comments on golf**

- § USA is a key target market for Wales' golf offering
- § Perception among US golf operators that product is good but marketing doesn't compete very well with neighbouring Scotland and Ireland, which have very substantial budgets for marketing golf

# Wales Campaigns & Activities

## - North America

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# Consumer Activity

Expedia More travel English List your property Support Trips

Cymru Wales Book now

## Where legends are made

Enter for your chance to win a stay in Wales.

Discover the land of legends.

Win a chance to stay in Wales, the land of legends.

Discover Wales, the land of legends.

Discover Wales, the land of legends.

Discover Wales, the land of legends.

Ad

Cymru Wales **Come be legendary**  
Follow your call for adventure to castle walls and storied lands.

Passport Ads

Discover the land of legends.

Book now

Expedia Cymru Wales



National Parks & Trails



Heritage & Culture



Adventure

## Find your epic adventure

Get ready for moonstruck castles, majes mountains, and a magical coast, where i tournament is just the start of history in making.



# Consumer Activity led by VisitBritain

Matador Network with Love GREAT Britain.  
Paid Partnership · March 22 at 12:00 PM · 🌐

From Scouse slang in Liverpool to Geordie words in Newcastle, Britain's accents are as diverse as its food, landscapes, and culture. #LoveGreatBritain



**WALES**

MATADORNETWORK.COM  
Britain's Diverse Accents, Food, and Culture with Alexa Moore

118 likes · 5 comments · 8 shares

## THE STOPS



## 9. Coasteering in Wales



Coasteering — an action-packed blend of rock-hopping, shore-scrambling, swell-riding, cave-exploring, and cliff-jumping — is the ultimate way to explore Britain's stunning coastline. (With all those hyphens, it's easy to see why a new term was needed.)

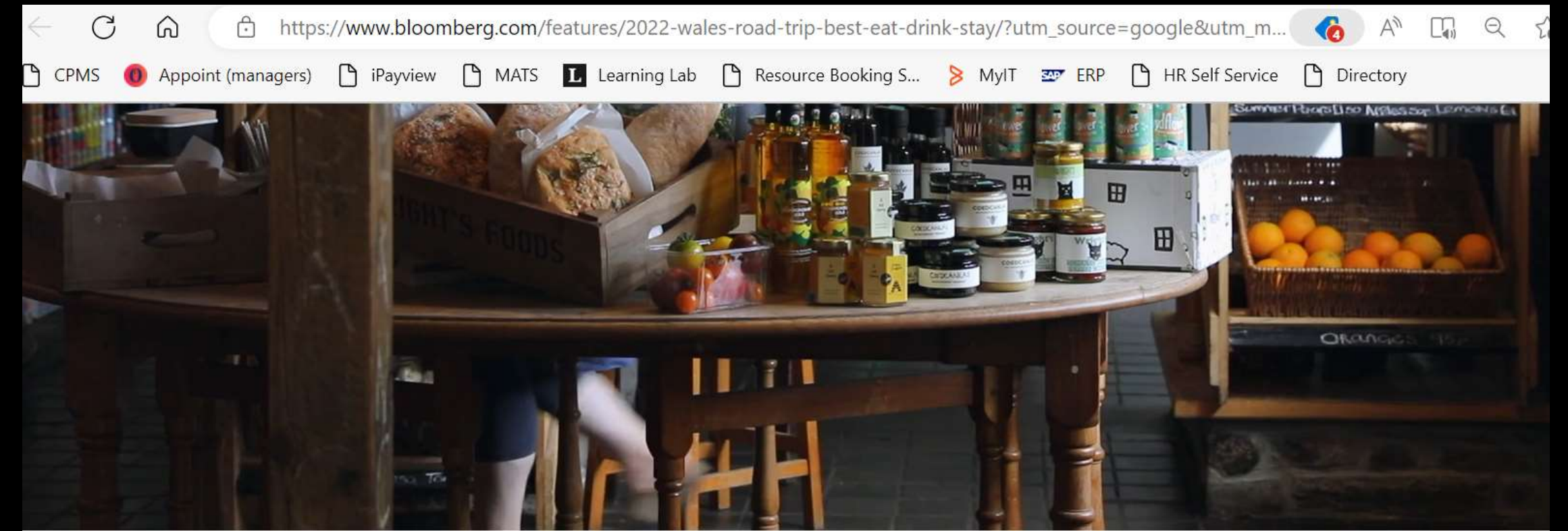
Recognized as the pioneer of this unique sport, Wales has tons of coasteering tour operators — [Celtic Quest Coasteering](#), [Anglesey Adventures](#), and [Bach Ventures](#) among them — who can arrange everything from relaxed half-day trips for little explorers to high-powered, full-day adventures for folks who really want a taste of the action. Turns out seeing Britain from a seat at the pub isn't the only way to do it! 🍷



# Consumer Activity Co-op Campaign with VisitBritain



# PR & Media Engagement



Wright's Food Emporium in Llanarthne, Wales. Photographer: Emili Bendixen for Bloomberg Businessweek

## Pursuits

# With Food and Drinks in the Spotlight, Now's the Perfect Time to Visit Wales

Here's where to eat, drink, and spend a night or two in





# Marketing Manchester Partnership



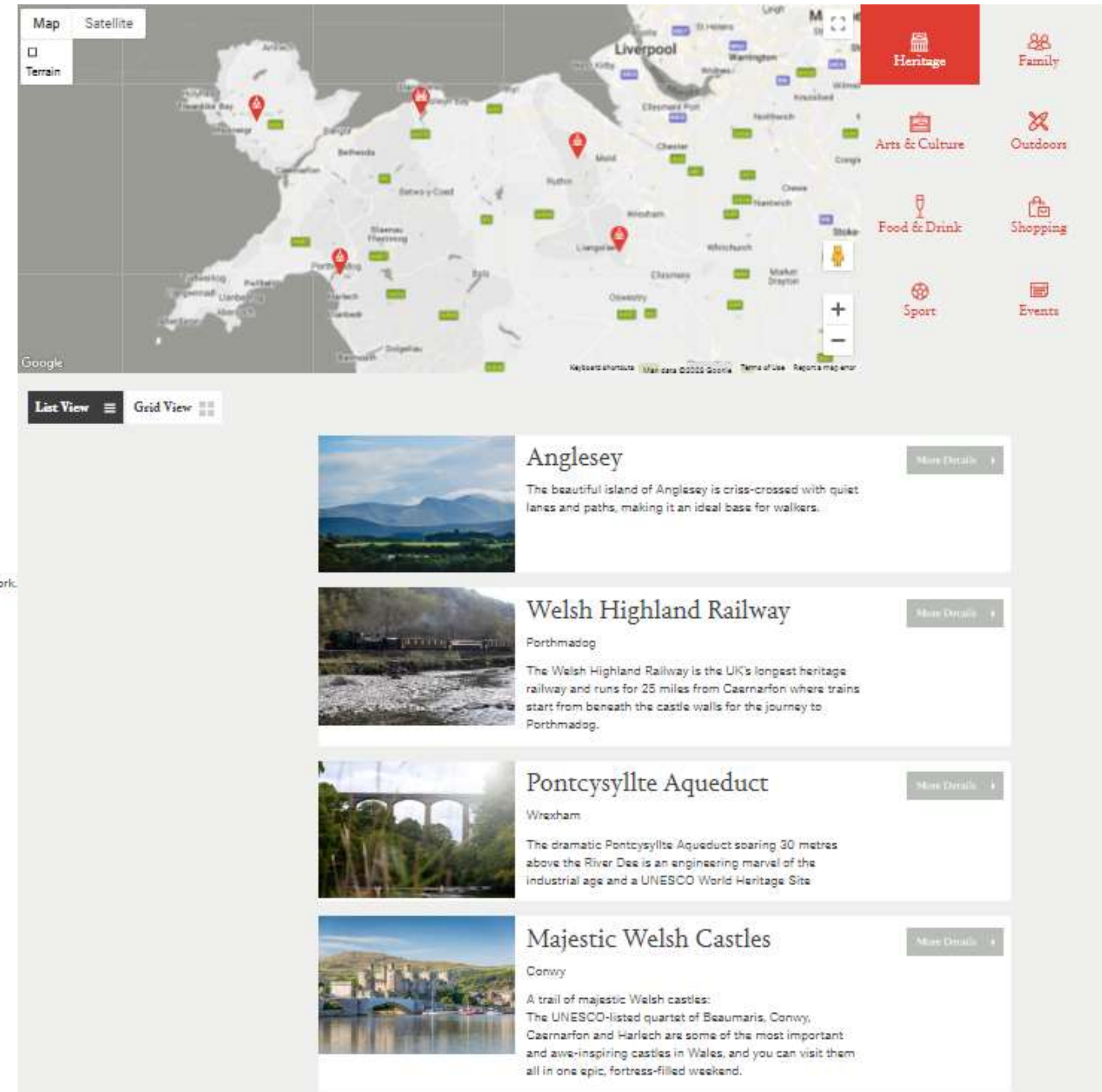
your Manchester visit even further with a [day trip or excursion](#). We're surrounded by beautiful [countryside](#), including the Lake District, the Peak District and Wales, and cosmopolitan cities such as Chester, Durham, Leeds, Liverpool, Newcastle and York. [Try](#) or check out the [box office](#) to purchase tickets for attractions and events.

is valid for 8 days and within that time you will be allowed 4 days of unlimited travel so you can travel to each city to explore its cultural offer. Sit back, relax and enjoy the beautiful countryside as you travel through the north of England.



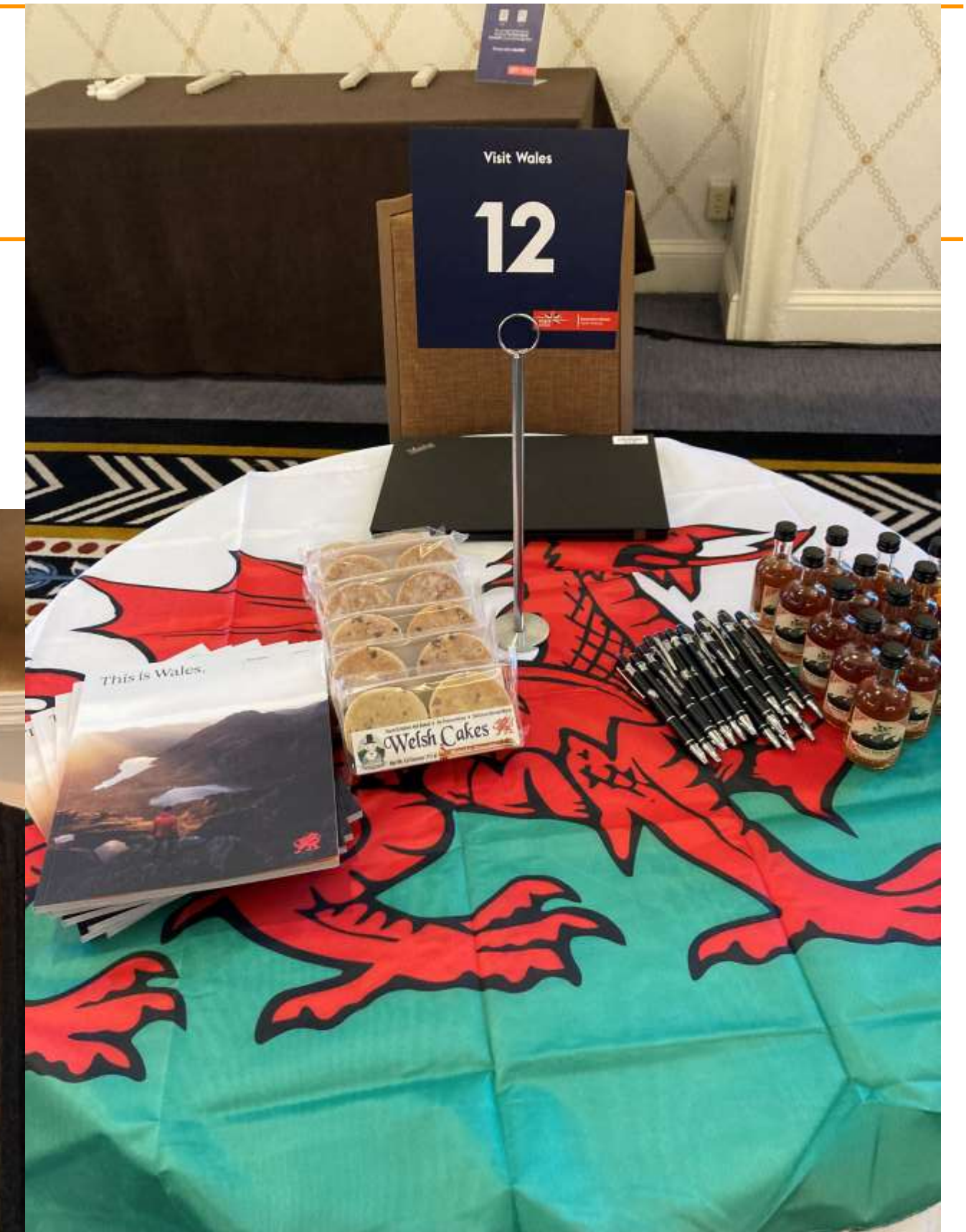
## Activity includes:

- Press trips to North Wales via Manchester
- Social media content and E-CRM activity going live in May
- Influencer campaign
- Activity maximising Wrexham opportunity



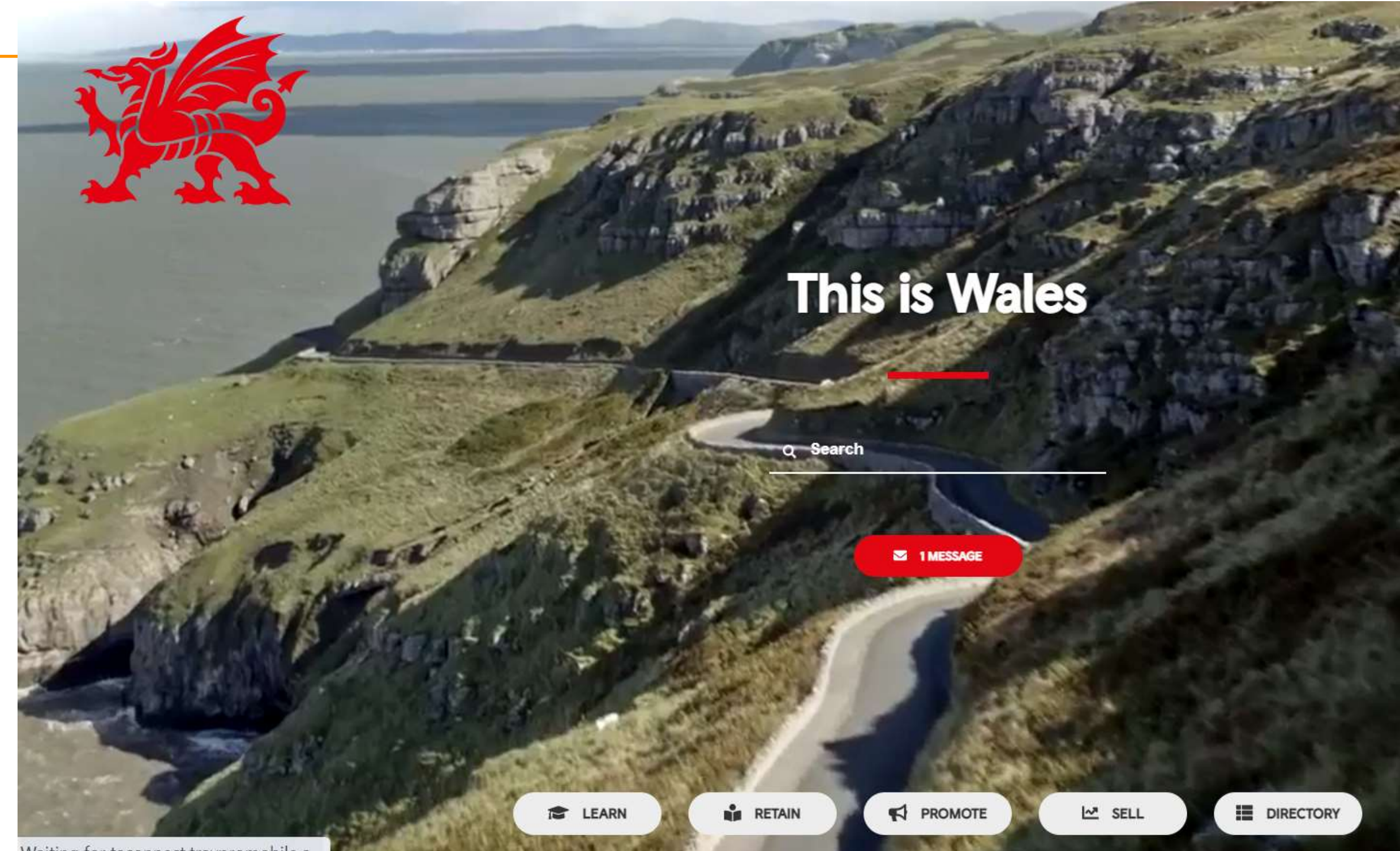
# 2023 Events

- **St. David's Day event** New York City, NY March 2
  - Special guest Matthew Rhys
- **AdventureELEVATE** Portland, ME May 9-11
- **Destination Britain North America** San Francisco CA September 7-9
- **IMEX America** Las Vegas, NV October 17-19
- **United States Tour Operators Association Annual Conference** Los Angeles, CA December 2-6
- Planning activity around Wrexham's US summer tour



# Travel Agent Activity

- We have a free, online training program for travel agents, [WalesTravelPro](#)
- The program consists of 3 chapters that cover the basics of getting to and getting around Wales as well as more detailed sections on the different regions of Wales
- There are also "promote" and "sell" features that include brochures, maps, itineraries, videos and images available to download
- Agents receive a certificate upon completion of the program
- To date, we've had 2,427 agents register for the program
- We are currently looking into various travel agent focused events to attend in North America throughout the year



# E-Newsletters

- We distribute a quarterly [digital newsletter](#) updating the industry on new accommodations, tours, and other product
- Our tour operator contact list consists of 456 contacts
- Our travel agent contact list consists of 1,904 contacts
- If your business or product has any new and relevant updates, [please reach out](#) and we can include in the newsletter

[Itineraries](#) | [Factsheets](#) | [Useful Information](#) | [News and Updates](#)



Skomer Island, Pembrokeshire

Claire,

A new year means a year full of new adventures! As we settle into 2023, we want to share Wales' latest product updates and upcoming events. With new accommodations and an increased spotlight on Wales, there has never been a better time to visit.

See more product updates and news on the [Travel Trade website](#).

## Connect with us

### Become a Wales' Travel PRO

Our free sales companion and certified training programme, Wales' TravelPRO, has all of the information, tools and resources you'll need to sell Wales to your clients.

[More about the program](#)

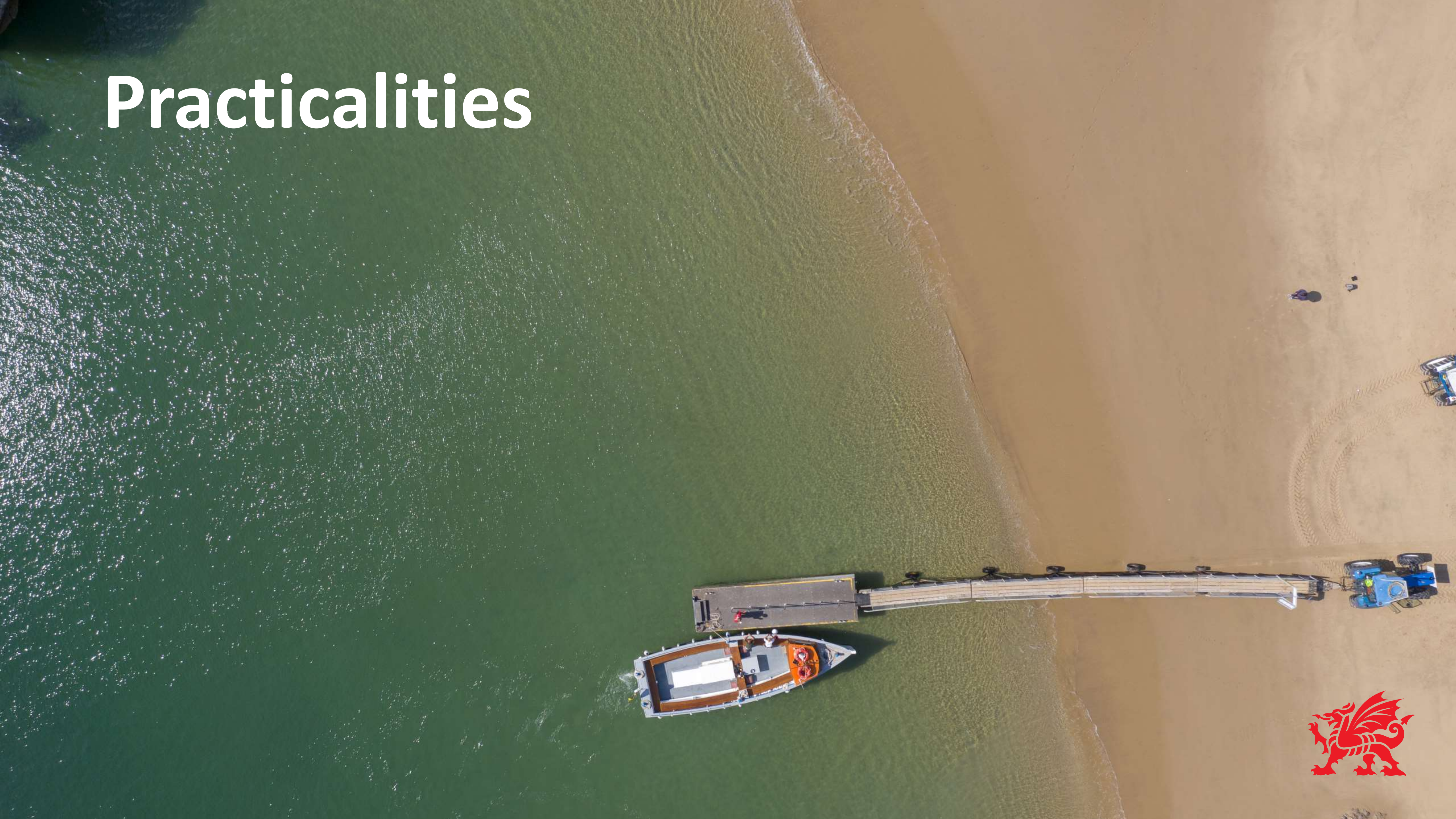


### Travel Trade Wales website

Find product updates, itinerary inspiration, and more helpful information about Wales specific for trade use on our Travel Trade website!

[Visit the website](#)

# Practicalities



# Getting There

- 2 hours from Heathrow Airport
- 1 hour by road from Liverpool, Manchester, Bristol & Birmingham
- Connecting flights are available to Cardiff Airport from Toronto, Vancouver and most US cities via Ireland (Aer Lingus) and the Netherlands (Delta-KLM)
- Direct ferries from Ireland
- 1 hour 40 minutes by train from London Paddington
- 3 hours by motorway from central London
- The Lake District is a 2 hour drive from North Wales
- Cardiff is 1 hour 10 minutes from Bath and the Cotswolds



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# UKinbound Members - Wales

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- Visit Wales
- Cadw
- Cambria@ASA
- Lovetovisit.com
- Rarebits Collection
- Southern Wales Tourism
- The Royal Mint
- Visit Cardiff



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# Keeping in touch.

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Diolch.  
Thank you.

