



## Destination UK – focus on Wales

Driving growth in the UK hospitality and leisure sector

# A word from Martin French

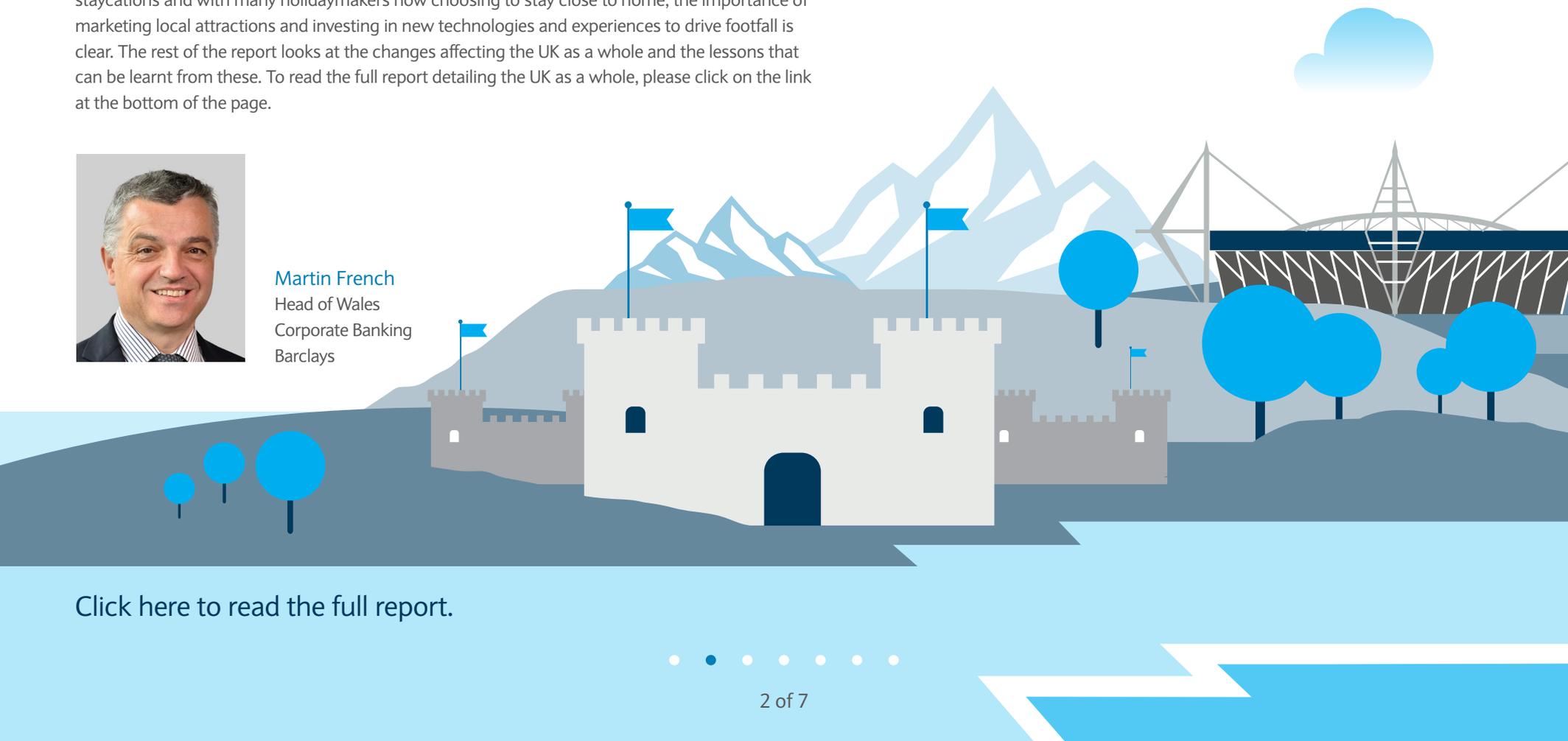
Connecting with British holidaymakers is more important than ever for hospitality and leisure providers as these are the customers who are more likely to visit again in the future.

These findings represent a fantastic opportunity for the businesses within Wales's already thriving hospitality and leisure industry to really target their offerings to the changing desires of both our international and domestic visitors. Wales is well placed to benefit from a booming year for British staycations and with many holidaymakers now choosing to stay close to home, the importance of marketing local attractions and investing in new technologies and experiences to drive footfall is clear. The rest of the report looks at the changes affecting the UK as a whole and the lessons that can be learnt from these. To read the full report detailing the UK as a whole, please click on the link at the bottom of the page.



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[Click here to read the full report.](#)



# Focus on Wales

The future for the Welsh hospitality industry is very bright, according to our recent study of holiday trends.

## Wales is set for a bumper year

We surveyed more than 2,000 UK holidaymakers and the results showed that 35% of those taking holidays could easily go overseas but choose to remain in the UK. This is hugely positive for Britain's economy and providers, demonstrating that holidaying in the UK is chosen on the basis of quality, value and convenience. 50% of Welsh people surveyed described holidaying in the UK as 'hassle free' due to the familiarity of the food, language and travel options.

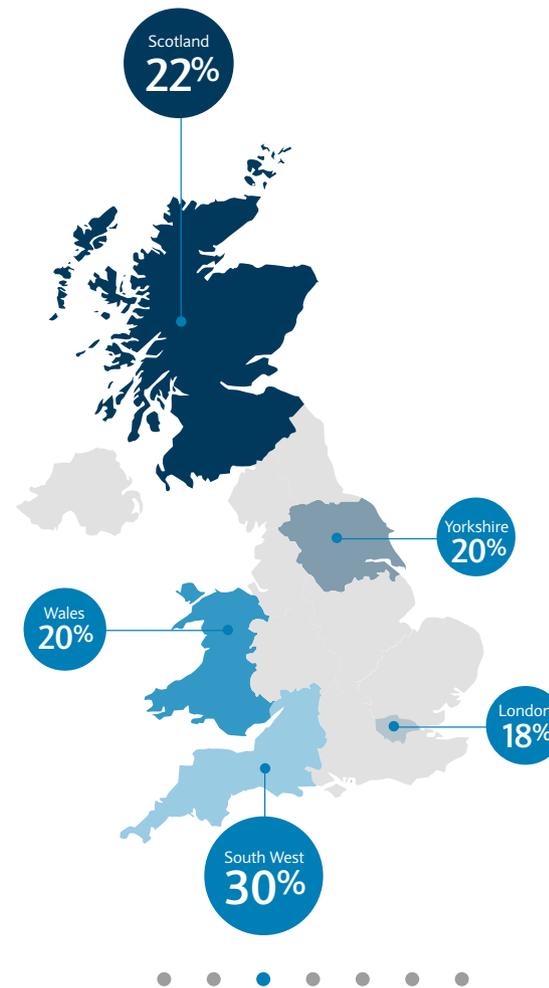
## 29% of international visitors we spoke to said they wanted to visit Wales's attractions

Of all UK holiday locations, Wales was the third most popular destination for domestic visitors, with 20% of those surveyed stating they'd like to visit. Similarly, 29% of over 7,000 international visitors we surveyed said they wanted to visit our attractions.

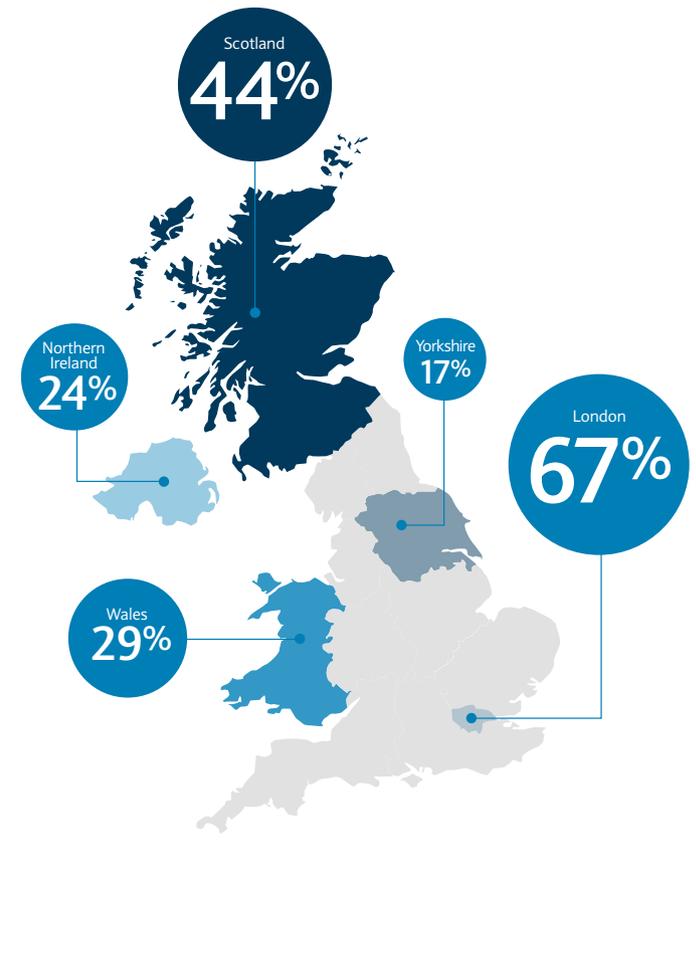
50% of Welsh holidaymakers would like to visit our cities of culture and engaging history that we have to offer and 23% would go and admire the appealing lakes and mountains the UK has long been renowned for. The extensive amount of rugged countryside that Wales has to offer draws in 6% more males to this type of holiday, 28% of them being aged between 18 and 24.

## Which regions in the UK are you planning on visiting? (Top 5)

UK visitors



International visitors



## A very Welsh staycation

The increase in British holidaymakers' budgets for domestic trips has given rise to 30% of people spending more on leisure activities than in previous years and taking short breaks within the UK in addition to a main overseas holiday. Out of the 49% from Wales taking these second short-break holidays, 20% felt that holidays in the UK are now more affordable and better value for money.

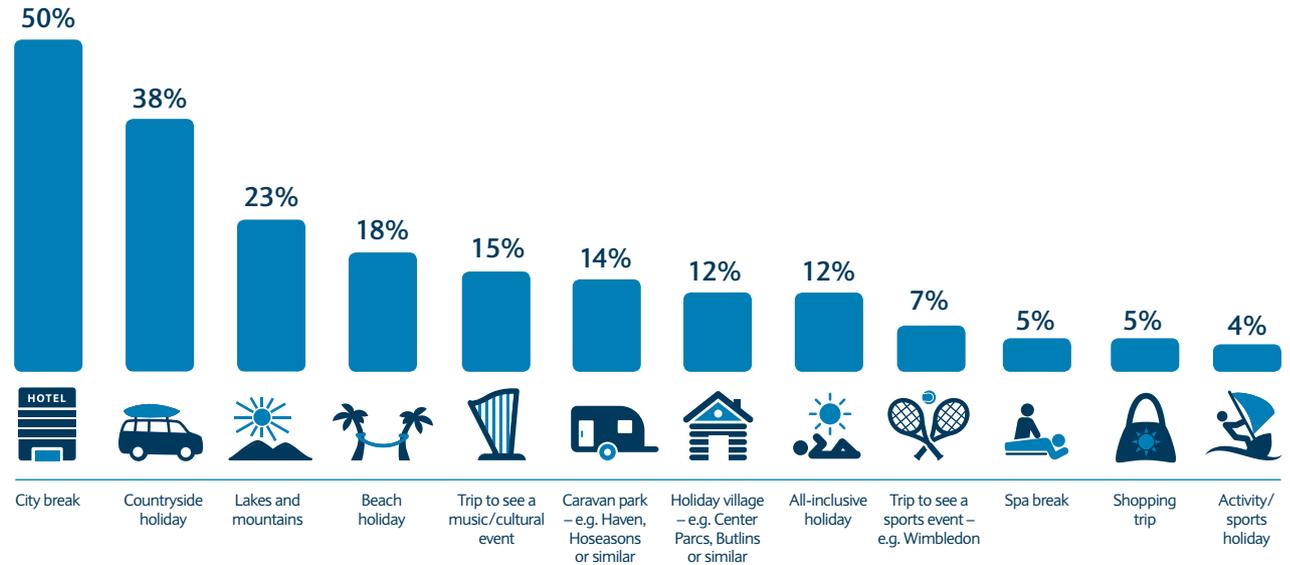
In addition to the popularity of the staycation growing over the past years, Wales also remains the prime holiday spot for the Welsh themselves, with 46% holidaying closer to home. The South West and London followed as the next most popular destinations for Welsh holidaymakers. 37% of those in Cardiff choose to stay in Wales for their holiday, with neighbouring Bristol coming a strong second at 25%.

## Personalise and emphasise

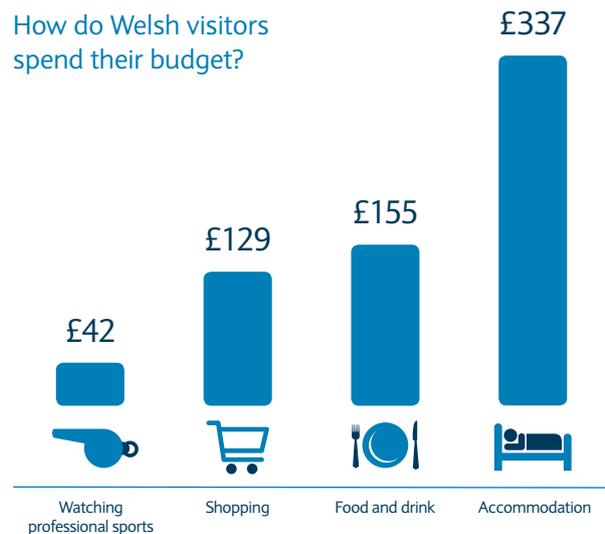
While self-catered apartments are becoming more popular with the rise of providers such as Airbnb, 46% of visitors from Wales still prefer to book a mid-market hotel. Only 5% of holidaymakers would book luxury 5 star hotels with 45% booking their accommodation directly through the website of the accommodation provider. Welsh holidaymakers spend an average of £337 on hotels and accommodation, higher than the domestic visitor's average of £309 per holiday.

The results of the survey show that eating out and shopping are the areas the Welsh are most likely to spend their remaining budget on. Overall we see a 23% spending increase in comparison to 2016, with 5% of Welsh holidaymakers having significantly more to spend

## What type of holiday are you planning in the UK this year?



## How do Welsh visitors spend their budget?



on experiences than in previous years. Hotels which emphasise their food offering are more of an appealing booking to 44% of Welsh holidaymakers.

When asked about the most important motivations for taking a break in the UK, 50% of Welsh holidaymakers said spending time with the family was very important, while 79% saw escapism/distraction as an important driver. Taking an education/learning break was seen as quite important by 39% of visitors; however, 21% thought a holiday where new skills could be experienced was not very important. With personalised visits and experiences increasing in popularity, the demand from Welsh holidaymakers for leisure providers to offer such holidays is 28%, compared to 33% at a national level.

# Strategies for success

To take advantage of increasing domestic and inbound tourism, businesses might consider the following:



## Be proud of Wales

The country retains its strong attraction as a holiday destination with renowned history and culture, to both domestic and international travellers. The political turmoil has had little impact on travel to Wales. The industry should be proud of, and leverage, the country's cultural assets to attract and retain visitors.



## One size doesn't fit all

Different demographic groups have diverse requirements and preferences when it comes to holidays and leisure experiences. For example, some offerings, such as mobile check-in, may only appeal to certain groups of people. Hospitality and leisure providers need to develop a range of products and services to match different expectations.



## Connect locally

Our survey shows that one third (30%) of holidaymakers expect to spend more on leisure activities this year than in prior years. Shopping accounts for the third-largest proportion of spending after hotel, food and drink spend.

Leisure operators should connect with local providers and retailers to develop packages of offerings that offer wider and richer choices.



## Adaptable customer experience

The rise of online and mobile booking continues apace, with over three-quarters (76%) of consumers willing to book online. However, 15% of visitors still prefer to book in person or by telephone – rising to 24% of consumers over 65.

While it is obviously vital to develop user-friendly and streamlined online booking for consumers, it is important not to overlook traditional booking methods, such as face-to-face and telephone booking.



## Cater for international tastes

Overseas holidaymakers can have different social and religious requirements from domestic travellers. Having services recognising these needs, such as free shuttle buses to airports, could help operators stand out from the competition. Start with simple offerings, such as free WiFi.



## Act decisively on feedback

Feedback takes many forms, from face to face to online, and it has become increasingly important for businesses to understand and react to it, and promptly.

A robust strategy for tracking and responding to feedback will ultimately enhance the guest experience and help improve the possibility of repeat visits, as well as referrals and recommendations of your business to other consumers. The skill is to identify what the most appropriate type of feedback is and to then have an effective process to manage and respond to it.



# Key takeaways

- The increased convenience and value for money of holidaying in the UK are driving a rise in the number of staycations for Britons, with more than one in three expecting to spend more time on holiday in the UK this year
- Short breaks are the main types of holiday for domestic visitors, with 20% planning to have a holiday in Wales. Wales remains a firm favourite destination for 46% of Welsh holidaymakers
- Wales has strong appeal for international travellers, with 29% choosing here as their main destination
- While there is a trend for booking through providers such as Airbnb, mid-market hotels remain the most popular hotel type that 46% of Welsh holidaymakers book
- 50% of Welsh holidaymakers said spending time with family was a very important motivation for taking a break in the UK
- Holidaymakers from Wales spend more than the average domestic visitor on such leisure activities as shopping, food and drink
- Welsh tourism providers need to consider visitor preferences from all over the UK to encourage Wales's appeal across the border.

Click [here](#) to read the full report or, alternatively, to find out more about how Barclays can support your business, please call 0800 015 4242\* or visit [barclayscorporate.com](https://www.barclayscorporate.com)

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**About this research**

The research is based on a bespoke survey of British and international holidaymakers from Opinium. The total sample size for the domestic market was 2,010 UK adults (aged 18+) who holiday in the UK. The fieldwork was undertaken between 20 February and 2 March 2017. The international survey was based on online interviews with 1,004 US adults, 1,003 German adults, 1,001 French adults, 1,003 Russian adults, 502 Saudi Arabian adults, 1,004 Australian adults, 1,004 Republic of Ireland adults and 1,002 Chinese adults (aged 18+) who have travelled internationally in the last five years. The fieldwork was undertaken from 22 February to 9 March 2017.

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