



Executive Summary

Growing travel trade business to Wales.

01—

24% increase in value from top 100 operators*

The value of the top 100 operators, regardless of Visit Wales' influence, is £18.1m in 2017. When counting only business which operators deem Visit Wales to have influenced, the value is £11.2m – an increase of 24% from the £9.0m value recorded for 2016.

02—

Sample value of 24.6m

The overall value of business from 488 operators in the research sample providing bed night data is approximately £24.6m.

03—

Visit Wales' interactions continue to be effective

About three in ten (27%) operators recalling interaction with Visit Wales say it has 'significantly' increased their interest or ability to feature or sell Wales programmes. The same proportion (27%) say it has 'slightly' increased their interest or ability. These results are very similar to 2016.

04—

154 new tours

Operators introducing new tours or programmes as a result of Visit Wales' interaction say that approximately 154 new tours/programmes have been generated in 2017.

05—

Featuring new regions

One in six (17%) operators featuring more than one region of Wales have introduced a new region into their portfolio in 2017.

North Wales in particular has benefited from expanded portfolios. 61% of those featuring a new region are now including North Wales for the first time.

06—

Main issues for Wales

Aside from consumer demand, the main issues facing Wales in terms of growing travel trade business appear to be:

- (Perceived) awkward access into Wales
- Quality/size/choice of hotels suitable for group travel in some areas
- Uncertainty of Brexit (only mentioned by German operators, but Germany is the second largest travel trade market)

07—

Continued interest in Wales

In spite of the above barriers, many operators are keen to do more in Wales.

Over half (57%) of operators who already feature Wales say they are planning to develop/sell more Wales programmes, or have a 'strong interest' to do so. This is similar to the 2016 result (54%).

About three in ten (31%) operators who currently do not include Wales say they are planning to include it, or have a 'strong interest' to do so. This is very similar to the 2016 result (30%).

* In 2010, Visit Wales identified its 'top 100 operators' in terms of future priorities for business development. Following the 2015 evaluation, this list was redefined to reflect priorities for Visit Wales in the period 2015-2020.





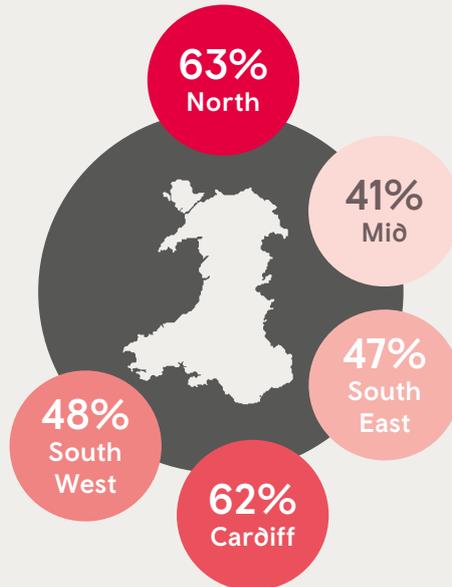
2017 Figures

Growing travel trade business to Wales.

Value of business from top 100 operators* influenced by Visit Wales in 2016.



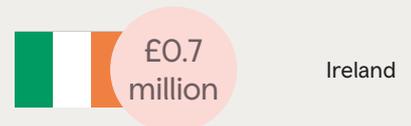
Areas of Wales featured in tours and programmes



Growth in value of top 100 operators*



Research sample values†



* In 2010, Visit Wales identified its 'top 100 operators' in terms of future priorities for business development. Following the 2015 evaluation, this list was redefined to reflect priorities for Visit Wales in the period 2015-2020.
 † Research sample of 488 tour operators.

