

## ACTIVE HOLIDAYS IN WALES

### UK Residents' Active Holidays in Wales

Wales is well known to have some of the most beautiful scenery and landscape in the world. What is becoming more evident is how this landscape is being harnessed as a centre for people interested in a more active holiday. The Welsh activity market<sup>1</sup> is becoming an increasingly important growth sector. This document outlines information relating to activity holidays in Wales.

The domestic figures are taken from the United Kingdom Tourism Survey (UKTS), an annual survey undertaken on behalf of the four UK tourist boards. The overseas figures are taken from the 2003 Overseas Visitors to Wales Survey undertaken by TNS Travel & Tourism.<sup>2</sup>

#### Main Points

- UK residents take on average 1.2 million trips in Wales per year where a specific activity is the purpose for the trip
- This equates to 18% of holidays to Wales by UK residents being undertaken with one or more activities being the main purpose of the trip.
- Over 83% of UK residents undertake one or more specific activities when on holiday in Wales (8% more than domestic holidays to the whole UK).

	Activity holiday as MAIN PURPOSE of Holiday Trip	Activity pursued as main purpose or not	ALL Holiday Trips
<i>N.B. These figures are the annual average over a three-year period.</i>			
Trips (m)	1.2	7.3	8.9
Bed nights (m)	4.1	30.5	34.9
Expenditure (£m)	180	1034	1212

14 % of UK holidaymakers to Wales came to undertake an activity as the main purpose of their trip. They accounted for 15% of expenditure, but only 12% of bed nights. Activity holidaymakers take short breaks and are high spenders. The vast majority of holidaymakers take part in some form of activity while in Wales.



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Due to sampling sizes it is more reliable to base figures on a three year average of UKTS figures. Unless stated otherwise all figures follow that specification. Figures given in brackets are UK equivalent figures.

### Popular activities in Wales

Activity	Activity as MAIN PURPOSE of holiday trip	Activity pursued as main purpose or not	Activity as MAIN PURPOSE of holiday trip	Activity pursued as main purpose or not
<i>N.B. These figures are the annual average over a three-year period.</i>				
	Trips (m)		Spend (m)	
Golf	0.10	0.38	24.5	63.2
Swimming	0.09	2.44	19.4	386.4
Cycling	0.09	0.79	10.3	126.4
Walking	0.48	6.55	71.2	907.8
Fishing	0.10	0.79	13.4	99.2
Petrocentric Activities *	0.14	0.51	13.0	70.7

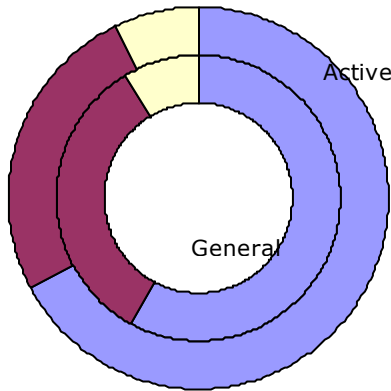
\* mountaineering/ rock climbing/ abseiling/ caving/ potholing

### 1. Duration of trip (UK equivalent figures)

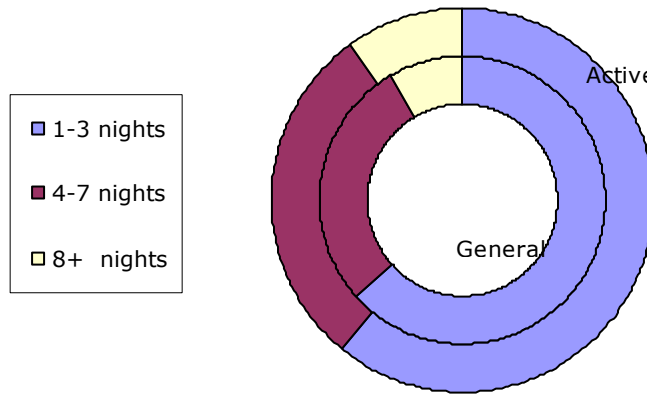
	Activity as MAIN PURPOSE of holiday trip (%)	Activity pursued as main purpose or not (%)	ALL holiday trips (%)
1-3 nights	67 (61)	54 (58)	58 (63)
4-7 nights	26 (29)	37 (32)	34 (28)
8+ nights	7 (10)	10 (10)	9 (8)
Average length of stay (nights)	3.4 (3.8)	4.2 (4.0)	4.0 (3.7)

Visitors to Wales where an activity was the main purpose of their holiday trip stayed on average 0.6 nights less than general holidaymakers<sup>3</sup>.

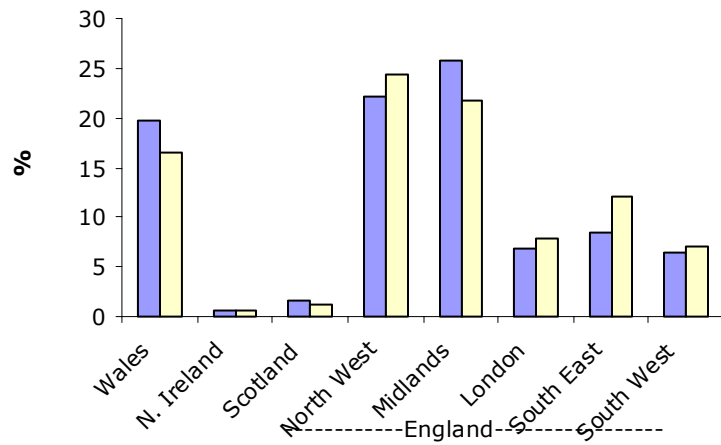
Duration of trip of Active / General Holidaymakers to Wales



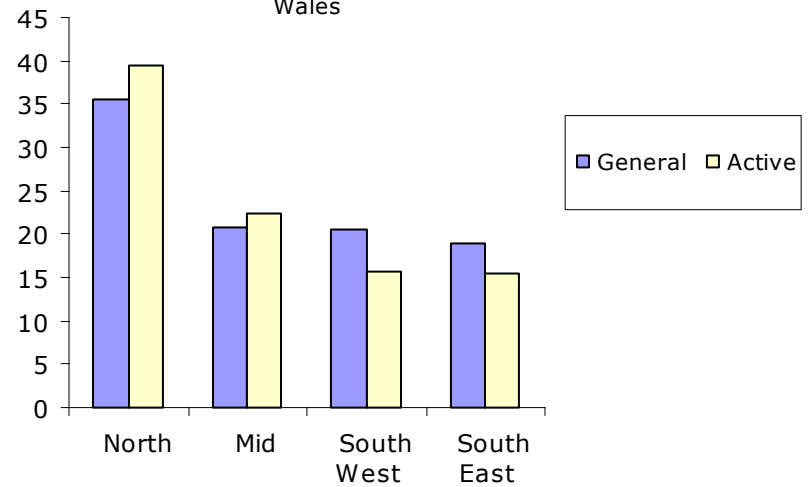
Duration of trip of Active / General Holidaymakers to the UK



Regional origin of Active / General Holidaymakers to Wales



Destination within Wales of Active / General Holidaymakers to Wales



## 2. Region of Origin

	Activity as MAIN PURPOSE of holiday trip (%)	Activity pursued as main purpose or not (%)	ALL holiday trips (%)
England	82	79	78
South East	12*	8	8.4
South West	7*	7	6.5
Midlands	22*	26	25.8
North West	24*	22	22.2
London	8*	7	6.8
Wales	17	19	20
Scotland	1.3	1.5	1.5
N. Ireland	0.7	0.7	0.6

\* Not all regions of England shown.

There are slight differences in the region of origins of those coming to pursue an activity in Wales as the main purpose of their trip – these holidaymakers do seem to be prepared to travel that little bit further: if their chosen activity is good to do in Wales then that is where they will go.

With respect to where the “actives” go in Wales – perhaps not surprisingly, a higher percentage of them gravitate towards North Wales compared to all holidaymakers. Obviously, North Wales has a lot to offer those seeking an active holiday.

## 3. Destination of Activity Holiday Trips

Area of Wales	Activity as MAIN PURPOSE of holiday trip (%)	Activity pursued as main purpose or not (%)	ALL holiday trips (%)
North	39	37	35
Mid	22	21	21
South West	16	21	21
South East	16	17	19

## 4. Seasonal Distribution

	Activity as MAIN PURPOSE of holiday trip (%)	Activity pursued as main purpose or not (%)	ALL holiday trips (%)
January – March	17(15)	13 (15)	14 (17)
April – June	33(30)	29 (27)	29 (27)
July – September	36 (37)	42 (37)	40 (34)
October - December	14 (17)	16 (21)	17 (23)

These figures do indicate that visitors coming to Wales for an activity holiday are slightly less seasonal than general UK holidaymakers. 40% of all trips occur during the peak quarter of July – September, whereas only 36% of activity trips take place during this period. Interestingly, activity holidays in January – March are nearly three percentage points ahead of all holiday trips during that period.

#### 5. Accommodation used

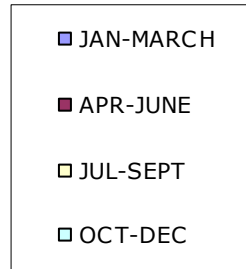
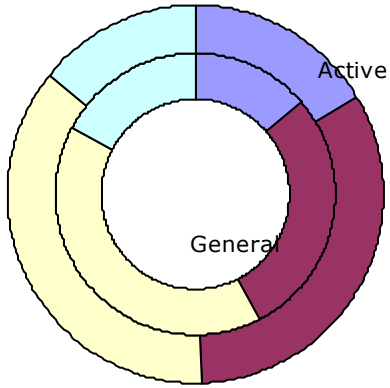
	Activity as MAIN PURPOSE of holiday trip (%)	Activity pursued as main purpose or not (%)	ALL holiday trips (%)
Hotel/Guesthouse	21 (28)	15 (25)	17 (24)
Bed & Breakfast <sup>1</sup>	11 (11)	7 (8)	7 (7)
Self Catering	14 (15)	11 (11)	10 (9)
Friends/Relatives	13 (19)	25 (35)	28 (40)
Camping/ Caravanning <sup>2</sup>	28 (18)	35 (19)	33 (16)

<sup>1</sup> Includes Bed & Breakfast type accommodation, including farmhouses

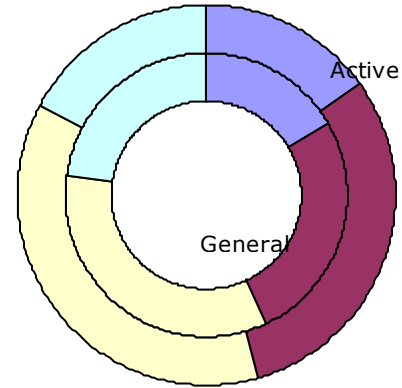
<sup>2</sup> Includes camping, towed and static (owned and rented) caravan accommodation

Holidaymakers coming to pursue their chosen activity are prepared to spend extra on accommodation – being far more likely to stay in paid serviced establishments than general holidaymakers. They come for only a couple of nights but seem to want comfortable lodgings in which to rest following participation in their activity.

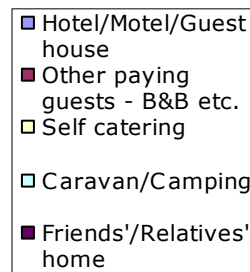
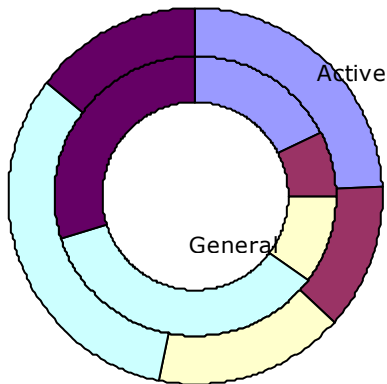
Seasonality of Active / General Holidaymakers to Wales



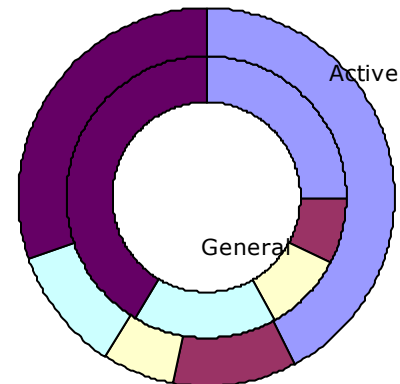
Seasonality of Active / General Holidaymakers to the UK



Accommodation Stayed in of Active / General Holidaymakers to Wales



Accommodation Stayed in of Active / General Holidaymakers to the UK



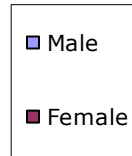
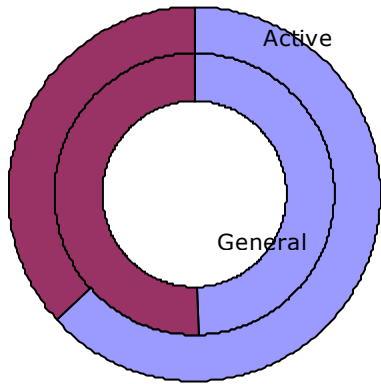
## 6. Profile of Activity Holidaymakers

Holidaymakers who come to Wales with an activity as the main purpose of their holiday have a higher proportion of males than general holidaymakers. (63% against 50%.)

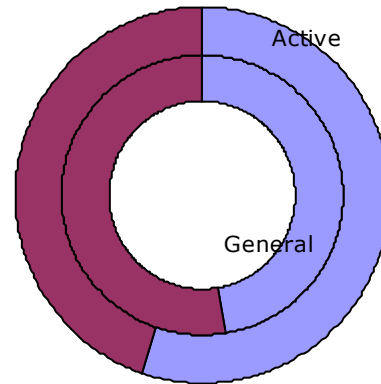
This group are also more likely to belong to social groups AB (33% against 28%)  
The UK market as a whole follows a similar profile, though to a lesser extent.

	Activity as MAIN PURPOSE of holiday trip (%)	Activity pursued as main purpose or not (%)	ALL holiday trips (%)
<b>Sex</b>			
Male	63 (55)	50 (47)	50 (47)
Female	37 (45)	50 (53)	51 (53)
<b>Lifecycle</b>			
Age 16-34 unmarried, no children	12 (9)	7 (8)	7 (9)
Age 16-34, married, no children	5 (4)	4 (3)	4 (4)
Age 16-34, married or unmarried, with children	8 (8)	10 (10)	10 (10)
Age 35-54, married or unmarried, no children	22 (20)	14 (16)	15 (16)
Age 35-54, married or unmarried, with children	27 (24)	30 (24)	28 (22)
Age 55+	18 (23)	27 (28)	27 (27)
<b>Social Class</b>			
AB	32 (35)	27 (30)	28 (30)
C1	35 (34)	30 (31)	30 (31)
C2	16 (18)	20 (20)	19 (20)
DE	17 (14)	23 (20)	23 (20)

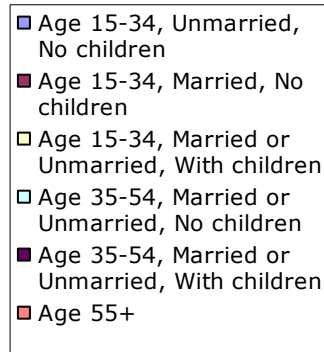
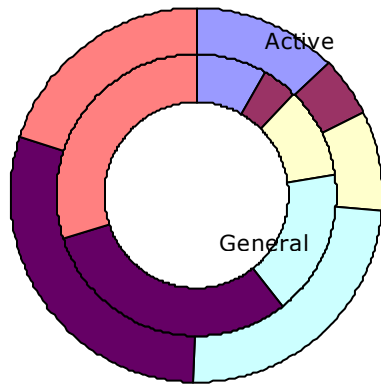
Gender of Active / General Holidaymakers to Wales



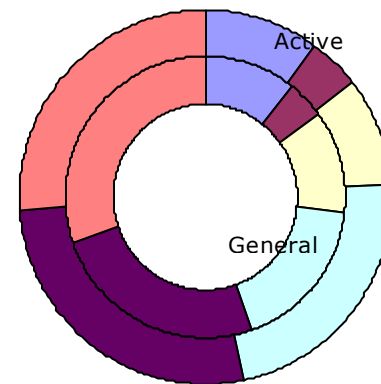
Gender of Active / General Holidaymakers to the UK



Lifecycle of Active / General Holidaymakers to Wales

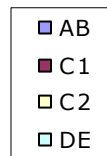
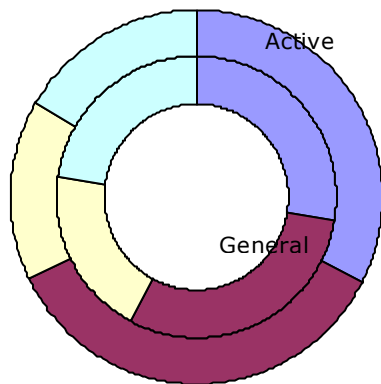


Lifecycle of Active / General Holidaymakers to the UK

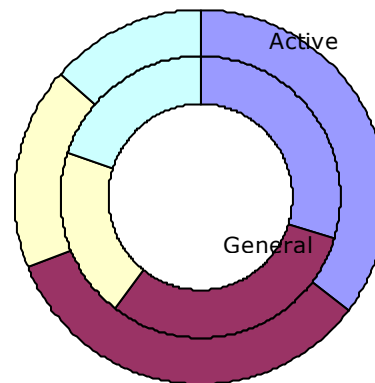




Social Class of Active / General Holidaymakers to Wales



Social Class of Active / General Holidaymakers to the UK



7. Key facts relating to several main activities.

	Activity as MAIN PURPOSE of holiday trip	Activity pursued as main purpose or not	ALL holiday trips
<i>N.B. These figures are the annual average over a three-year period.</i>			
<b>GOLF</b>			
Trips (m)	0.10	0.38	8.9
Bed nights (m)	0.31	1.9	34.9
Expenditure (£m)	24.5	63.2	1212
<b>WALKING</b>			
Trips (m)	0.48	6.55	8.9
Bed nights (m)	1.8	27.6	34.9
Expenditure (£m)	71	908	1212
<b>SWIMMING</b>			
Trips (m)	0.09	2.44	8.9
Bed nights (m)	0.40	11.7	34.9
Expenditure (£m)	19	386	1212
<b>CYCLING</b>			
Trips (m)	0.09	0.79	8.9
Bed nights (m)	0.25	3.4	34.9
Expenditure (£m)	10	126	1212
<b>PETROCENTRIC ACTIVITIES *</b>			
Trips (m)	0.14	0.51	8.9
Bed nights (m)	0.34	1.9	34.9
Expenditure (£m)	13	71	1212

\* mountaineering/ rock climbing/ abseiling/ caving/ potholing

## Overseas Residents Activity Holidays in Wales

In 2003 WTB commissioned TNS Travel & Tourism to undertake a survey of overseas visitors to Wales, part of the survey investigated what activities were undertaken most commonly by overseas visitors – this section is included below, and includes all activities, not just the active activities this report previously specified. The full Overseas Visitor Survey report is available from Wales Tourist Board. These figures do not provide total volume and value for overseas visitors, however International Passenger Survey figures for 2003 reveal that Wales hosted nearly 900,000 overseas visitors who spent £269 million. The figures can therefore be thought of within that context.

### Introduction

The range and quality of things for visitors to do in a destination is a vital element of the tourism product. On this basis, Wales Tourist Board were particularly interested in establishing levels of participation amongst overseas visitors in different types of activity, and the range of visitor attractions visited during their holiday in Wales. It was then important to establish their levels of satisfaction with each of the activities undertaken, and in particular, the different types of attraction visited. To provide context for these opinions and ratings, in both the self-completion questionnaire of the main survey and the TIC-distributed questionnaire, respondents were asked to indicate which activities had been undertaken during their visit to Wales, and which one, if any, could be described as their 'main activity'. This analysis is undertaken in the first part of this section of the report and there then follows an analysis of their levels of satisfaction with the key activities and types of attractions.

It is important to highlight that the methodological approach used in this study is always likely to under-represent the true levels of participation in a number of the more active, niche pursuits (e.g. golfing, hill walking, and sailing). The choice of interview locations was designed to cover as wide a spectrum of types of visitor as possible, however the focus of the study is naturally on overseas holiday visitors in general, rather than those people visiting to specifically take part in particular activities.

### All activities undertaken

Table F-1 overleaf provides an indication of the levels of participation in different types of activity undertaken by overseas visitors to Wales over the period of the survey. To ensure comparability with other data on activities undertaken by tourists in Wales, the list of activities is identical to those that have been used for many years in the United Kingdom Tourism Survey (UKTS) – the main survey of domestic tourism in the United Kingdom:

**Table F-1 - Activities undertaken (%)**

Base: Main survey self-completion questionnaire and TIC survey (N=688)

	Lifecyle			Primary Overseas Markets					Other Overseas Markets			Total Overseas Markets
	Young Independ	Families	Empty Nests	USA	Germany	France	Holland	Ireland	Australia	Europe	Other long haul	
Visiting heritage sites (castles, monuments, churches)	84	81	86	95	82	■	81	■	89	82	90	85
Hiking/walking/rambling/orienteering	69	65	53	60	79	■	76	■	47	64	55	61
Visiting arts/heritage exhibits (museums, galleries)	52	40	49	48	43	■	35	■	50	57	58	48
Field Study/nature study/bird & wildlife watching	20	20	16	17	34	■	38	■	10	22	5	19
Visiting a theme park/activity park	17	21	8	6	9	■	16	■	13	19	12	13
Outdoor swimming	17	23	5	5	34	■	17	■	5	8	7	12
Some other hobby/special interest holiday	8	8	13	16	10	■	7	■	12	12	6	11
Watching the performing arts	11	8	8	12	11	■	9	■	4	8	7	9
Indoor swimming	7	20	4	4	8	■	12	■	4	8	4	7
Visiting the cinema	14	7	2	4	7	■	5	■	3	8	4	6
Cycling	7	8	4	3	10	■	17	■	2	4	3	5
Mountaineering/rockclimbing/abseiling/caving	7	8	2	3	14	■	5	■	2	6	2	5
Horse riding/pony trekking	6	7	2	1	4	■	7	■	2	5	4	4
Watching any sport/sporting event	6	12	1	3	6	■	-	■	1	9	6	4
Motor boat cruising	7	4	2	1	5	■	9	■	3	4	5	4
Other sailing/yachting/boating/windsurfing	8	6	2	5	3	■	5	■	3	8	2	4
Golf	1	5	3	-	2	■	2	■	2	3	3	3
Fishing - sea angling	1	7	1	1	2	■	2	■	2	5	2	2
Multi-activity package	2	1	1	1	-	■	-	■	1	2	-	1
Fishing - course or game	2	4	*	1	-	■	3	■	1	2	-	1
Tennis	2	-	1	1	1	■	-	■	-	3	-	1
Taking part in any other particular sport	2	3	*	1	1	■	-	■	1	3	-	1
Mountain biking	5	-	*	1	2	■	2	■	-	4	1	1
Water-skiing/powerboating	2	-	1	-	-	■	2	■	1	2	1	1
Shooting/stalking/hunting	2	-	*	-	-	■	2	■	1	2	2	1
<b>Total</b>	100	100	100	100	100	100	100	100	100	100	100	100
Base (No. of Respondents):	N=176	N=96	N=304	N=146	N=104	N=34	N=58	N=34	N=100	N=107	N=95	N=688

■ sample size too small for meaningful analysis  
 - nil respondents; \* less than 0.5%

Similar to the findings of the 2000 survey, visiting heritage sites such as castles, monuments and churches was the most popular activity – almost nine in every ten of them had visited such locations during their Welsh holiday (85% compared to 86% in 2000). Walking/hiking/rambling was the most popular active pursuit undertaken– around six in ten visitors undertook this activity whilst in Wales (61%). Once again, this was very similar to the comparative figure recorded in 2000 (63%). The other key activity undertaken by overseas visitors to Wales was visiting arts and heritage exhibits such as galleries and museums – approximately half of all visitors participated in this activity (48% compared to 45% in 2000). All of the other activities listed in the table on the previous page were undertaken by less than a fifth of visitors. Field and nature studies, bird watching etc. was undertaken by 19% of visitors (compared to 18% in 2000), whilst visiting a theme or activity park was undertaken by 13% of trips (compared to 11% in 2000). Around one in eight respondents also were swimming outdoors (12%). This is slightly higher than the comparative figure recorded in 2000 (7%). The only other activity undertaken by more than one in ten visitors was some other hobby or special interest holiday – 11% compared to 12% in 2000. A wide range of activities were undertaken by between 2% and 9% of visitors, reflecting the range of opportunities on offer to the visitor to Wales. As was mentioned previously however, the choice of interview sites in this type of study will always under-represent those visitors who undertake more active pursuits, particularly in rural locations.

Not surprisingly, there were some notable variations in participation levels across the main origin markets and the three lifecycle segments:

- *Young Independents:* in general, Young Independents exhibited fairly similar participation profiles to the average for all overseas visitors. However, this market were more likely than average to visit the cinema (14%), watch the performing arts (11%), go sailing/yachting/boating or windsurfing (9%) and go mountain biking (5%);
- *Families:* Families were the lifecycle segment least likely to visit arts and heritage exhibits (40%) but more likely than average to visit a theme or activity park (21%), outdoor swimming (23%), indoor swimming (20%) and watching a sporting event (12%);
- *Empty Nesters:* generally, participation levels in some of the more active pursuits were slightly lower than the overall averages. For example, 53% went hiking and walking (61% overall), and 5% went swimming outdoor (12% overall). Empty nesters were also the market least likely to visit a theme park (8%);
- *US visitors:* This market was more likely than any other market segment to visits heritage sites (95%). American visitors were also more likely than average to undertake some other hobby or special interest holiday (16%). On the other hand, they were less likely to visit a theme or activity park (6%);

- *German visitors:* hiking/walking/rambling and orienteering was particularly popular amongst this market with around eight in ten visitors participating in this type of activity (79%), a similar proportion to those who were visiting heritage sites (79%). Also particularly popular amongst this market segment were field study/nature study/bird & wildlife watching and outdoor swimming each undertaken by a third of them (34%). German visitors were also the market most likely to go mountaineering or rock climbing (14%);
- *Dutch visitors:* similar to the German market, Dutch visitors were more likely than average to go hiking and walking (76%) and go on a field study/nature study or bird and wildlife watching (38%). Cycling was also more important than average amongst this market (17%). Visiting arts and heritage exhibits were less popular than average amongst Dutch visitors (35%, compared to 48% overall);
- *Australian visitors:* around nine in ten visitors went to a heritage site (89%) and around half of visitors were hiking and hillwalking (47%) and visiting arts and heritage exhibits (50%);
- *Other European visitors:* generally the results were similar to those for all overseas visitors although there were a few notable differences e.g. they were more likely to visit arts and heritage exhibits (57%) and visit a theme or activity park (19%);
- *Other long haul visitors:* nine in ten other long haul visitors had been to a heritage site (90%). This market was also more likely than average to visit an art or heritage exhibit (58%) but less likely than average to go on a field study/nature study or bird and wildlife watching (5%).

## Main activities undertaken

In order to provide a greater degree of understanding and explanation of the relative importance of activities undertaken during the visit to Wales, respondents were asked to indicate which activity could be described as the MAIN one undertaken. Table F-2 overleaf therefore illustrates the main activities undertaken during their visit:

**Table F-2 - Main activities undertaken (%)**

Base: Main survey self-completion questionnaire and TIC survey (N=688)

	Lifecycle			Primary Overseas Markets					Other Overseas Markets			Total Overseas Markets
	Young Independ	Families	Empty Nests	USA	Germany	France	Holland	Ireland	Australia	Europe	Other long haul	
Visiting heritage sites (castles, monuments, churches)	38	34	40	47	27	■	21	■	51	33	43	37
Hiking/walking/rambling/orienteering	28	20	19	19	36	■	45	■	15	22	20	23
Some other hobby/special interest holiday	3	2	6	6	2	■	-	■	6	4	3	4
Visiting arts/heritage exhibits (museums, galleries)	4	3	4	5	2	■	2	■	3	3	6	3
Field Study/nature study/bird & wildlife watching	2	3	1	1	5	■	5	■	1	3	1	2
Cycling	2	-	2	1	3	■	5	■	2	1	1	2
Visiting a theme park/activity park	1	2	-	-	-	■	-	■	-	-	-	1
Outdoor swimming	2	1	*	1	5	■	-	■	-	-	-	1
Other sailing/yachting/boating/windsurfing	1	2	*	1	-	■	2	■	2	1	-	1
Watching the performing arts	-	1	-	-	1	■	-	■	-	-	-	*
Watching any sport/sporting event	1	-	-	-	-	■	-	■	-	1	1	*
Motor boat cruising	-	-	-	-	-	■	-	■	1	-	-	*
Golf	-	1	1	-	-	■	-	■	-	1	-	*
Fishing - sea angling	-	1	-	-	1	■	-	■	-	-	-	*
Multi-activity package	-	1	*	1	-	■	-	■	-	1	-	*
Taking part in any other particular sport	-	-	*	-	-	■	-	■	1	-	-	*
Water-skiing/powerboating	1	-	-	-	-	■	-	■	-	1	-	*
Indoor swimming	-	-	-	-	-	■	-	■	-	-	-	-
Visiting the cinema	-	-	-	-	-	■	-	■	-	-	-	-
Horse riding/pony trekking	-	-	-	-	-	■	-	■	-	-	-	-
Fishing - course or game	-	-	-	-	-	■	-	■	-	-	-	-
Tennis	-	-	-	-	-	■	-	■	-	-	-	-
Mountain biking	-	-	-	-	-	■	-	■	-	-	-	-
Shooting/stalking/hunting	-	-	-	-	-	■	-	■	-	-	-	-
<b>Total</b>	100	100	100	100	100	100	100	100	100	100	100	100
Base (No. of Respondents):	N=176	N=96	N=304	N=146	N=104	N=34	N=58	N=34	N=100	N=107	N=95	N=688

■ sample size too small for meaningful analysis

- nil respondents; \* less than 0.5%

As in 2000, there were two activities that were identified as the most important main activities. Almost two-fifths of visitors said that visiting heritage sites was their main activity – 37% compared to 43% in 2000. Just under a further of respondents stated that hiking and rambling was their main activity (23%). This figure is eight percentage points lower than the comparative figure recorded in 2000 (31%). This variation may be accounted for by the larger number of Dutch visitors who were in the sample in 2000 as this market were particularly likely to state that hiking and walking was their main activity.

None of the other activities were mentioned by more than 4% of respondents. In terms of differences by origin, American and Australian visitors were most likely to describe their main activity as visiting heritage sites – 47% and 51% respectively. On the other hand, German and Dutch visitors were more likely to go hiking or walking as their main activity - 36% and 45% respectively.

In terms of lifecycle, Young Independents and Empty Nesters were more likely to state their main activity was visiting heritage sites – 40% and 38% respectively. Young Independents were more likely than Families or Empty Nesters to go hiking or walking – 28% compared to 20% of Families and 19% of Young Independents.

### Notes

1. This report includes only those activities where the holidaymaker actively participates (see list below) activities of a more passive nature are outlined in the companion document Recreational Holidays in Wales.
2. UKTS surveys ask respondents to indicate whether they undertook a large range of activities and whether the activity was the main purpose of the holiday or not. The range of activities being: swimming; diving; sailing/boating; canoeing; windsurfing; water skiing; fishing; walking; cycling; field/nature study; petrocentric activities; horse/pony riding; shooting/stalking/hunting; snow skiing; adrenaline sports (e.g. bungee jumping/ white water rafting); golfing; tennis; taking part in any other particular sport; health/fitness activities. For ease of comparability the Overseas Visitor Survey uses the same headings.
3. The commentary and charts through the domestic section of this document refers to recreations as the main purpose of the holiday trip unless stated otherwise. The report covers the period 2000-2002.

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This is one of a series of factsheets prepared by the Strategy Department of the Wales Tourist Board. For further information, please contact: Ceri Hughes, Marketing Analyst, Wales Tourist Board, Brunel House, 2 Fitzalan Road, Cardiff, CF24 0UY.

Tel: 029 2047 5358 Fax: 029 2047 5323

E-Mail: [research.enquiries@tourism.wales.gov.uk](mailto:research.enquiries@tourism.wales.gov.uk) Website: [www.wtbonline.gov.uk](http://www.wtbonline.gov.uk).