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Tourism Market Demand Report: Germany March 2020

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government

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Visit Wales

Market Study
Summary Report

Germany

March 2020

Produced by BVA BDRC

Contents

1. Introduction

Understanding this report

1.1 As the Welsh Government's tourism team, Visit Wales is responsible for deploying tourism campaigns in the UK and internationally to promote Wales as a holiday destination. As part of this, each year Visit Wales conducts research amongst its priority markets. The research broadly looks at:

- General holiday and short break intentions for the upcoming 12 months
- The factors influencing holiday and short break choice, generally and to/within the UK
- Types of destination and experiences favoured on holidays and short breaks in the UK
- Awareness, perceptions and consideration of destinations within the UK for a holiday or short break
- Perceptions of Wales as a holiday or short break destination
- Planning and booking sources for trips to Wales
- Engagement with Visit Wales information channels
- Profiling and demographics

1.2 The research is conducted at various intervals throughout the year.

1.3 This report is the first in a series of regular summary reports which will be issued following each wave of the study. The summary reports will outline the key findings from each survey wave.

1.4 This report outlines the findings from the **German market.**

Methodology

1.5 Respondents were contacted though an online panel with the survey that could be completed via desktop or mobile device.

1.6 Fieldwork took place from **27th February to 9th March 2020,** prior to the main COVID-19 outbreak and restrictions in the UK. There were 1,000 completed responses.

1.7 The survey took 20 minutes to complete on average

Sample definition

1.8 To qualify for the survey, participants had to fulfil the following criteria:

- Must be a holiday or short break decision-maker
- Must be *seriously* considering taking a holiday or short break in paid-for accommodation in the UK in the next few years.

2. Headline Findings

2
Percentage point
Net increase in intended trips to UK in next 12 months

19
Percentage point
Net increase in intended trips in Germany in next

6
Percentage point
Net increase in intended trips to Mainland Europe in next 12 months

-23
Percentage point
Net decrease in intended trips to Rest of World in next 12 months

Top barriers to visiting the UK

- **30%** Personal circumstances
- **27%** Too expensive in UK
- **25%** Uncertainty around Brexit

Top reasons for visiting the UK

- **44%** There's lots of different places to visit
- **39%** Welcoming destination
- **37%** Safe destination to travel to

Environmental concerns are particularly important for the German market for almost two thirds an influencing factor on their holiday decisions.

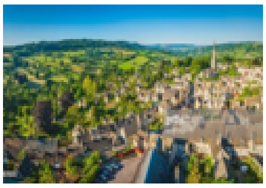
This can be beneficial for travel to the UK as 30% perceive it being 'nearby so reducing impact on environment' as a reason to travel to the UK

Most likely to consider these locations for a holiday to the UK

Historic and heritage towns
68%

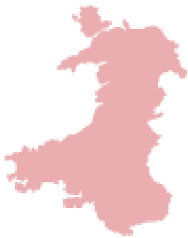
Cities and large towns
61%

Scenic coastline and harbours
56%

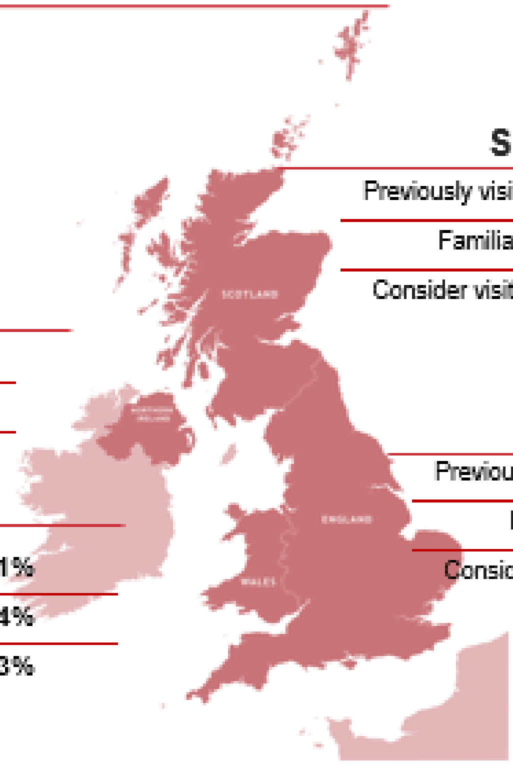


Scenic countryside and villages
53%

Wales is most associated with historic and heritage towns and scenic countryside and villages although both have higher associations in other UK countries



Relationship with countries in the UK and Ireland



Scotland

Previously visited	39%
Familiarity	33%
Consider visiting	55%

Ireland

Previously visited	39%
Familiarity	33%
Consider visiting	54%

England

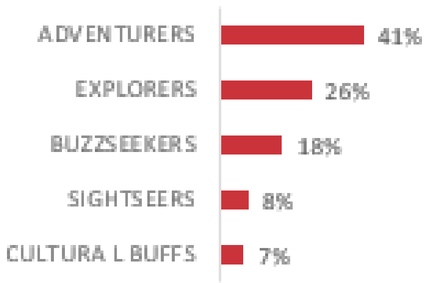
Previously visited	63%
Familiarity	46%
Consider visiting	63%

Wales

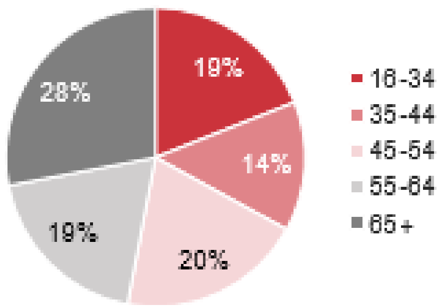
Previous visited	31%
Familiarity	24%
Consider visiting	33%

Demographics of the German market considering a trip to Wales

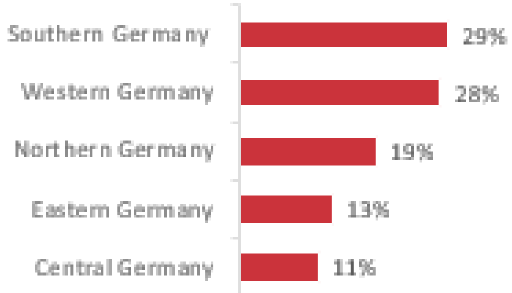
Segments



Age breakdown



Region



Children under 16 in household

23%

Top 5 reasons for *not* visiting Wales:

27%
I don't know enough about what there is to do

27%
It's on my list but I want to see other places first

26%
Wales is more expensive than other destinations

23%
Other places in the UK are just more appealing

22%
A special offer or package somewhere else in the UK has swayed my decision

Stage of planning next trip to Wales (% of Wales considerers)

Top 3 places intending to visit

68% Cardiff

57% South Wales

40% West Wales

Planned length of trip to Wales amongst 'Wales considerers' (QG2) (Base: n=197)

5%
Plan on taking a short break to Wales (1-3 nights)

95%
Plan on taking a holiday to Wales (4+ nights)

8 nights
Average length of planned trip to Wales (nights)

The main information sources the German market use to plan trips (%)

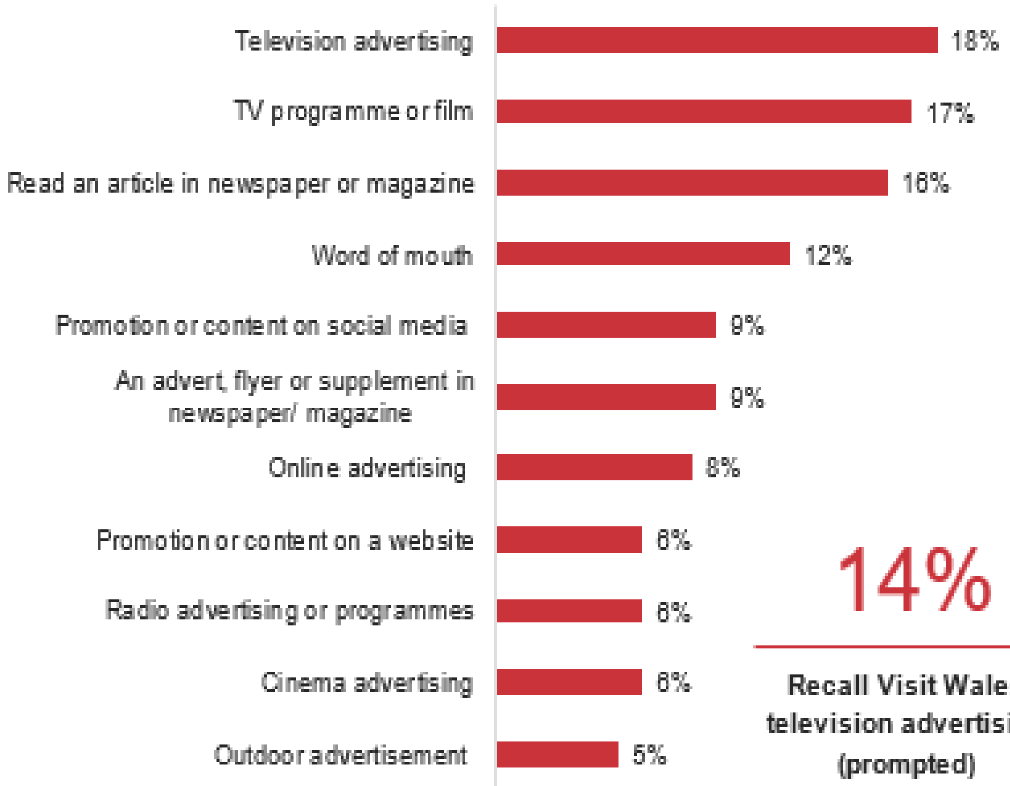
78% Websites/apps

63% Personal recommendation

56% Printed information

35% Email or social media

Communications seen/heard about Wales recently



14%

Recall Visit Wales television advertising (prompted)

43%

State that they have never been on a holiday or short break to Wales but would like to

Anticipated mode of travel to Wales

39% Car – hired / rented taxi

38% Own / friends / family's / company car

24% Train

3. Influences on holiday & short break behaviour

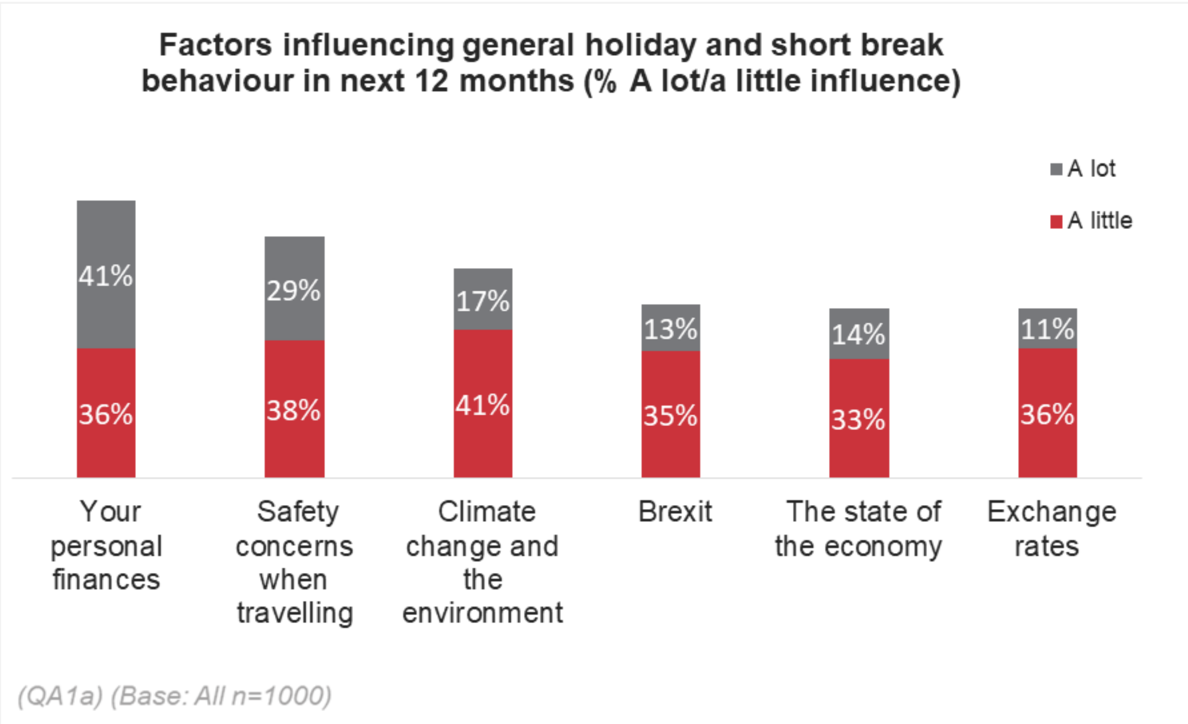
Main influences on holiday and short break behaviour

3.1 ‘Personal finances’ are the factor most likely to influence the German market’s holiday and short break decision-making in 2020 (77% citing it as having a lot/little influence), followed by ‘concerns over safety’ (67%).

3.2 Environmental concerns (58%) are the third biggest influence, significantly more important to the German market than the UK and Irish markets.

3.3 Although ‘Brexit’, ‘exchange rates’ and ‘the state of the economy’ are less influential, they do nevertheless all carry influence for the German market (each a lot/little influential for half the market).

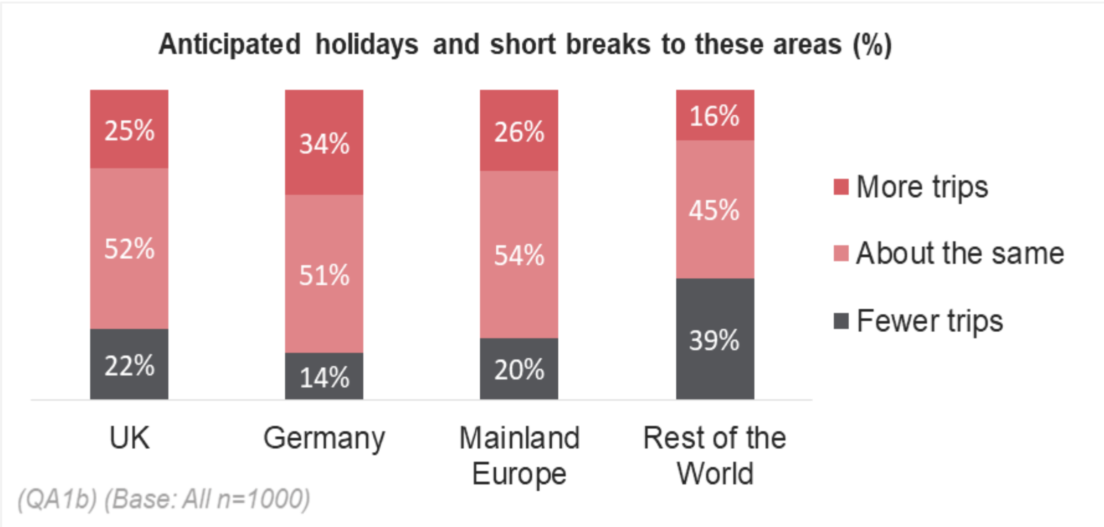
Figure 1



Intention to visit the UK

3.4 Prior to the initial COVID-19 outbreak in Europe, just over half of the German market expected to take a similar number of trips to the UK in the next 12 months as they did in the 12 months prior to completing the survey. One in four (25%) stated they anticipated taking more trips to the UK in the following 12 months, slightly more than those who stated they anticipated taking fewer (22%). This is roughly similar to intentions to travel to mainland Europe. A higher proportion of the German market intend to take more domestic holidays (34%). Trips to the rest of the world were predicted as declining however, with 39% saying they intend to take fewer trips. The fewer trips to the rest of the world may be linked to concerns about the environment and long haul travel.

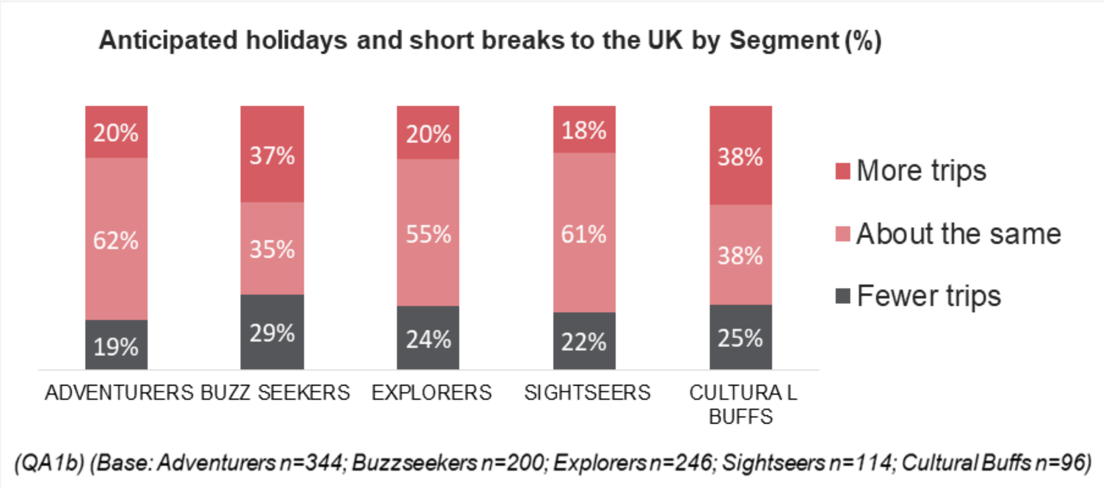
Figure 2



3.5 We have reviewed results by the different target segments identified by Visit Britain and key differences are identified in the report. For more detail on these segments, please go to https://www.visitbritain.org/understanding-our-customer-segments

3.6 Across the different segments, Cultural Buffs are the most likely to take more trips to the UK in the next 12 months (38% compared to 25% on average) along with Buzzseekers (37% compared to 25% on average). Interestingly, when we compare this to relationship with visiting Wales later in this report, Buzzseekers and Cultural Buffs have the greatest numbers of previous visitors who intend to return to Wales in the future, suggesting an opportunity to capitalise on their strong UK trip intentions with encouraging a trip to Wales for these two segments.

Figure 3

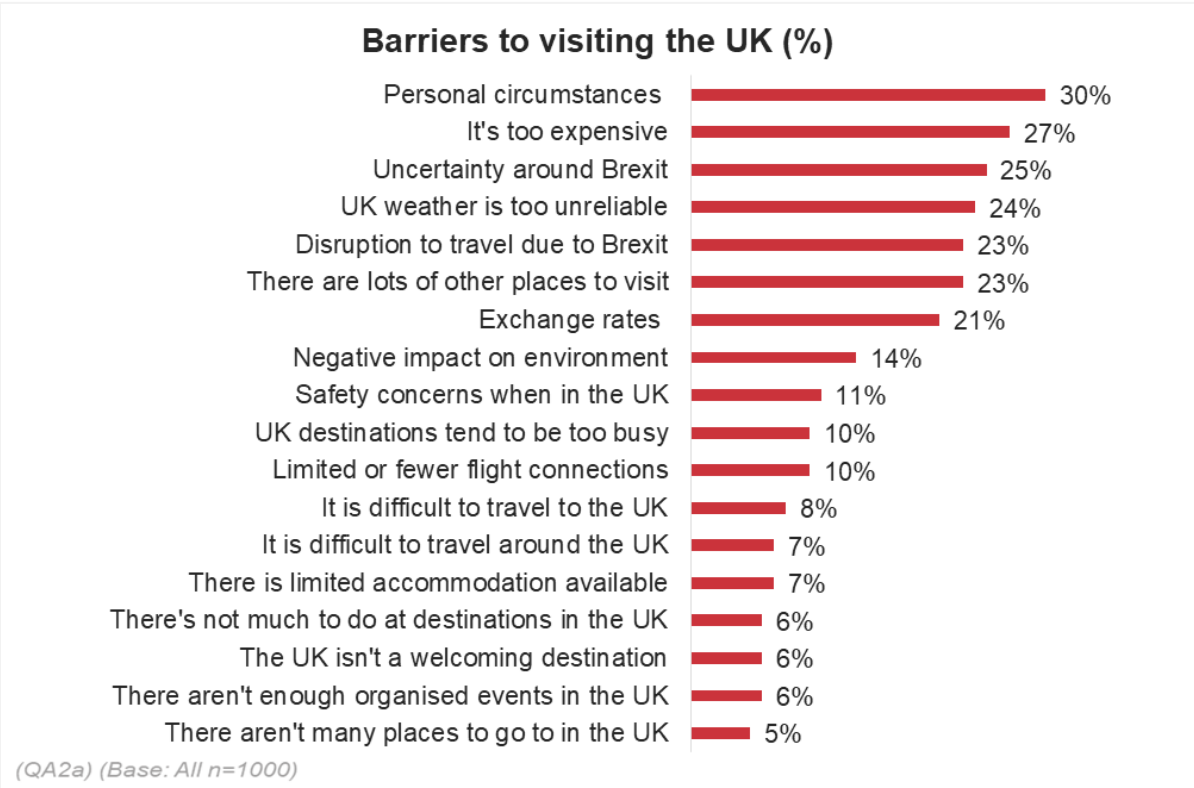


Barriers to visiting the UK

3.7 With specific reference to holidays in the UK, 'personal circumstances' were cited as the main barrier to visiting amongst the German market (30% stating this), followed by 'it's too expensive in the UK generally' (27%) and 'uncertainty around Brexit' (25%). A notable 1 in 4 cited 'disruption to travel as a result of Brexit' (23%) as a key potential barrier.

3.8 Together, Brexit-specific reasons are regarded as a barrier for 48% of the German market. The expense of a holiday trip to the UK and unreliability of weather are also concerns.

Figure 4



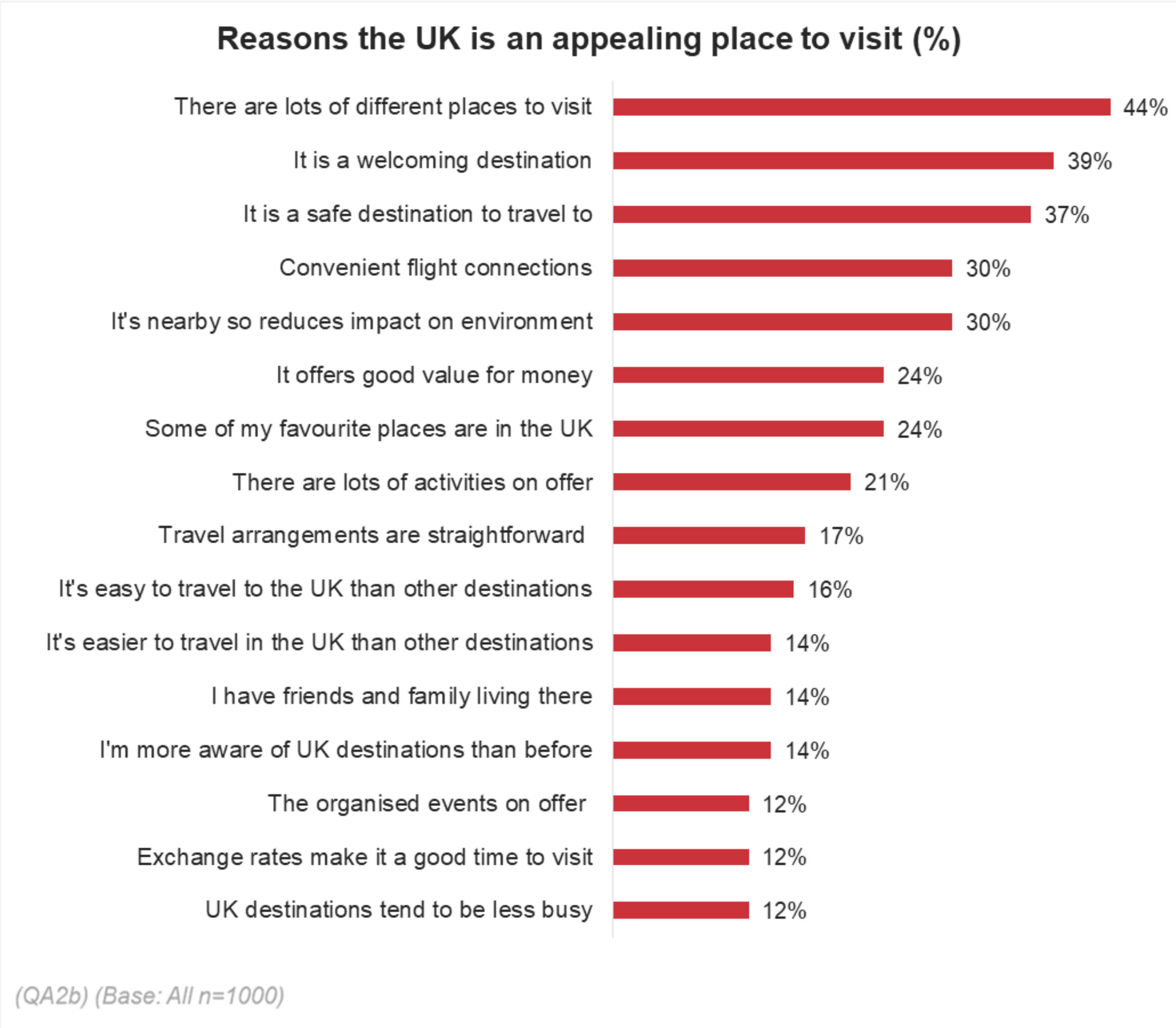
Reasons the UK is an appealing place to visit

3.9 Destination factors dominate the top 10 reasons why the UK is regarded as an appealing place to visit for the German market. 'Lots of different places to visit' (44%), 'it's a welcoming destination' (39%) and 'some of my favourite places are in the UK' (24%) were all mentioned. Convenience and value factors are also a strong influence – 30% highlight 'convenient flight connections' and 24% that the UK 'offers good value for money'. Linked to concern about the environment, 3 in 10 (30%) see the UK as an appealing place to visit because 'it is nearby and reduces impact on environment'.

3.10 Notably, the German market came up with more reasons the UK is appealing than barriers to visiting.

3.11 There are some differences across segments. Adventurers are most likely to find the UK appealing because of the amount of different places to visit (56%) whilst sightseers are more likely to be drawn by the convenient flight connections (39%). Cultural Buffs meanwhile are most drawn to the UK as it is a safe destination to travel to (36%).

Figure 5



Types of holiday destinations being considered in the UK

3.12 The German market are most likely to seriously consider taking a trip to the UK's urban areas for a holiday or short break in the next few years – 'historic and heritage towns' the most appealing (68% stating this), followed by 'cities and large towns' (61%). Notably within the UK and Ireland, Wales is the country least likely to be associated with each of these types of destinations.

3.13 'Scenic coastline and harbours' are the next most appealing for travel to the UK (56%), followed by 'scenic countryside and villages' (53%). Associations with Wales are relatively higher for each of these than they are for urban areas. Just under half of the German market consider a Touring holiday (47%) suggesting an opportunity for Visit Wales to promote this type of holiday experience and the Wales Way routes.

3.14 Over a third of the German market find wilderness and nature an appealing type of destination (37%). Notably, it is Scotland and Ireland that are most associated with this type of destination, followed by Wales and then England. Large resort hotels and self-contained holiday villages have lower appeal for the German market taking a UK holidays.

Figure 6

Types of Holiday destination considered for UK trip (%)

3.15 Adventurers (74%) and Explorers (72%) are most likely to seek out Historic and Heritage towns (vs and average of 67%). While sightseers (68%) and cultural buffs (66%) are most likely to seek out Cities and Large towns. When looking at associations with Wales, Cultural buffs (56%) and Adventurers (51%) have the highest association of Wales as a destination for a touring holiday. Buzzseekers are more likely than other segments to be interested in large resort hotels and holiday centres.

Figure 7 **Types of Holiday destination considered for UK trip by segment (%)**

(QB1) (Base: Adventurers n=344 ; Buzzseekers n=200 ; Explorers n=246 ; Sightseers n=114 ; Cultural buffs n=96)

	ADVENTURERS	BUZZSEEKERS	EXPLORERS	SIGHTSEERS	CULTURAL BUFFS
Historic and heritage towns	74%	58%	72%	67%	63%
Cities and large towns	63%	60%	55%	68%	66%
Scenic coastline and harbours	64%	41%	63%	44%	50%
Scenic countryside and villages	62%	43%	59%	38%	48%
A touring holiday	53%	44%	48%	32%	45%
Wilderness and nature	42%	35%	38%	23%	34%
Mountain adventure	34%	33%	34%	16%	42%
Traditional seaside resorts	32%	32%	29%	31%	35%
Large resort hotel	9%	27%	8%	15%	24%
Holiday village/centre	8%	22%	9%	23%	18%

Types of experiences being considered in the UK

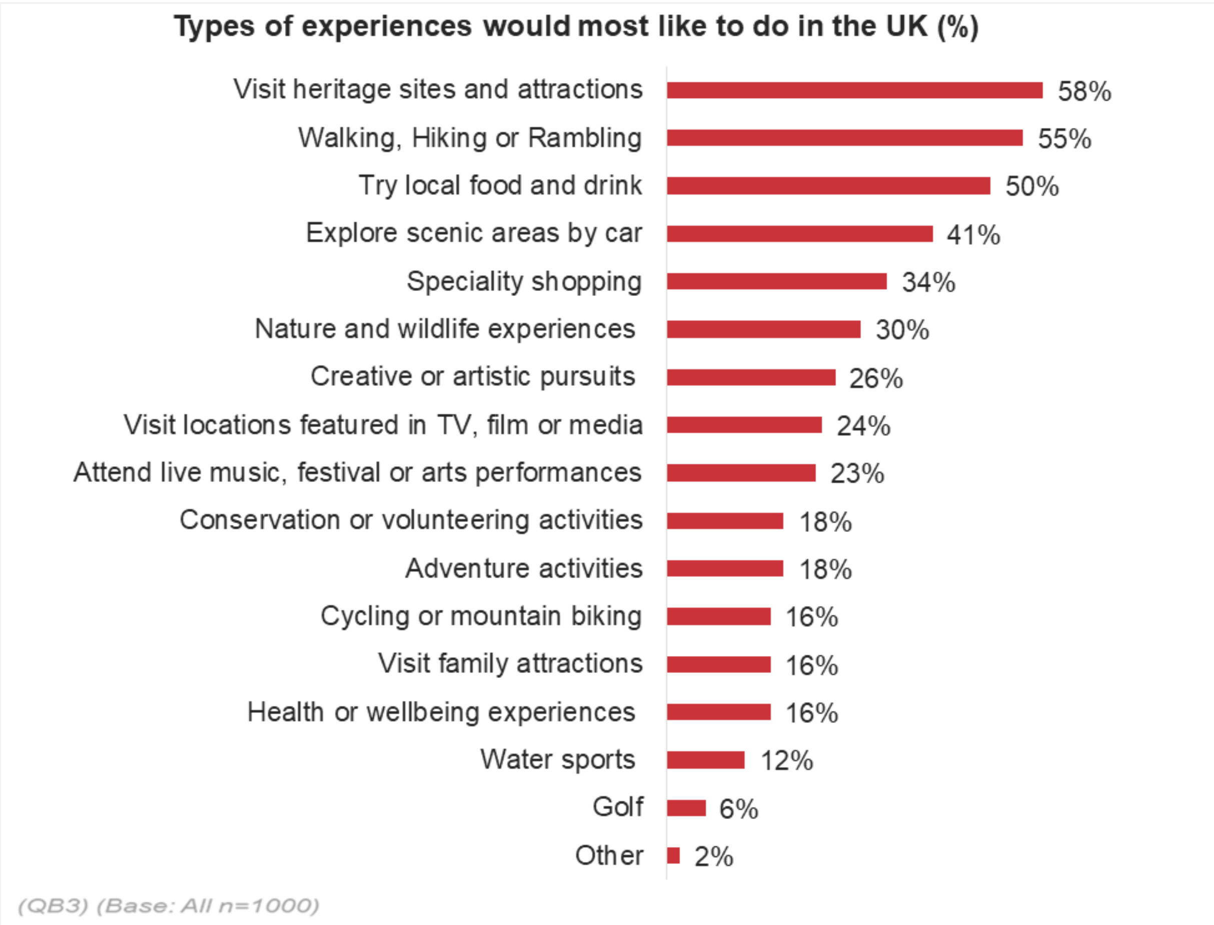
3.16 The German market consider a range of experiences on a holiday or short break in the UK, the most popular being 'visiting heritage sites and attractions' (58%) and 'walking, hiking or rambling' (55%). Of those with children in their household, (around a quarter of the German market), seeking out creative pursuits, adventure activities or conservation activities as well as family attractions are more important than for those without children.

3.17 The German market also place importance on trying local food and drink, with 50% seeking out these experiences. This highlights an opportunity to showcase the best of Welsh local produce.

3.18 While walking, hiking and rambling does rate high individually, when including other activities that specifically mention exercise (walking hiking or rambling, cycling, water sports, golf and adventure activities), these are of interest for 71% of the market. This highlights a real opportunity for Wales to promote their appeal to the German market.

3.19 With over 40% interested in exploring scenic areas by car and just under half interested in a touring holiday (47%), there may be a good opportunity to promote the Wales Way Routes to the German market.

Figure 8



Influences on holidays

3.20 Linked to their favoured destination types and experiences, 'famous landmarks and attractions' (57%) and 'incredible scenery and experiences' (50%) are the most influential factors when visitors from Germany are choosing holidays or short breaks in the UK. Heritage is influential for just under half (46%) of the German. Just under half (49%) are influenced by quality of accommodation (18% valuing high quality accommodation and 39% accommodation with charm and character).

3.21 Unlike the UK and Ireland markets, value for money is a less important factor to German travellers (29%). Rather the German market prioritises welcoming people and cultural factors when considering a trip to the UK.

3.22 Visitors from Germany are much more outdoorsy when compared to other markets, prioritising walking, hiking and rambling as well as incredible scenery and landscapes. Surprisingly, an environmentally friendly destination is less influential when choosing a holiday in the UK, despite climate change and the environment being stated as important factors influencing Germans overall holiday behaviour over the next 12 months.

Figure 9

4. Consideration of Wales

Familiarity and relationship with selected countries

4.1 The German market are less familiar with Wales than they are with any of the other countries within the UK and Ireland, 24% stating they know Wales very/fairly well. Familiarity is highest with England (46%), while Ireland and Scotland are equally familiar to one in three Germans. Wales also has a lower proportion of previous German visitors than Scotland, Ireland and especially England, at around 30%.

4.2 Familiarity generally correlates with visits. Of those strongly considering visiting Wales in the future, their familiarity with Wales is still much lower than for any other country, highlighting the need to educate the German market on things to do in Wales. Positively, over 2 in 5 of the German market have not visited Wales but would like to, suggesting there is opportunity for significant growth from this market.

Figure 10

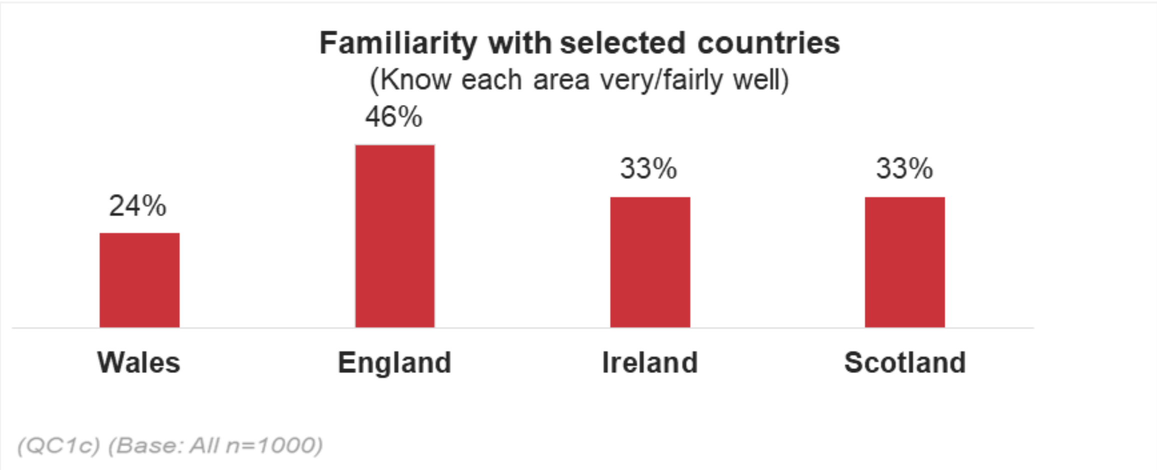
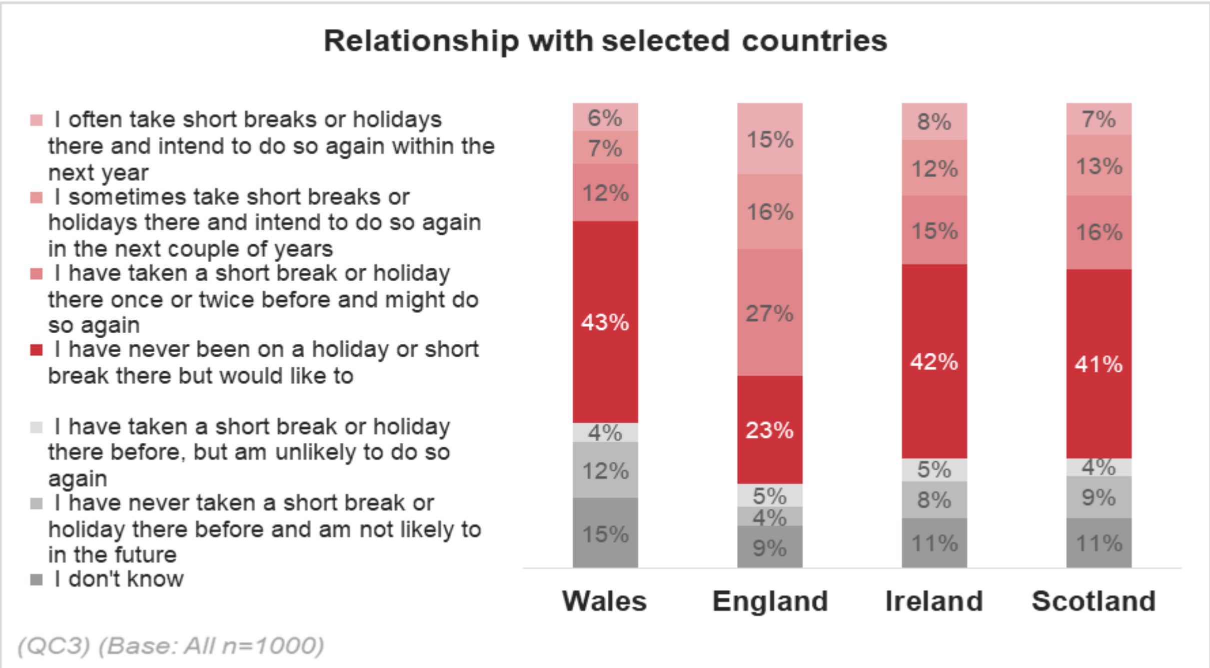
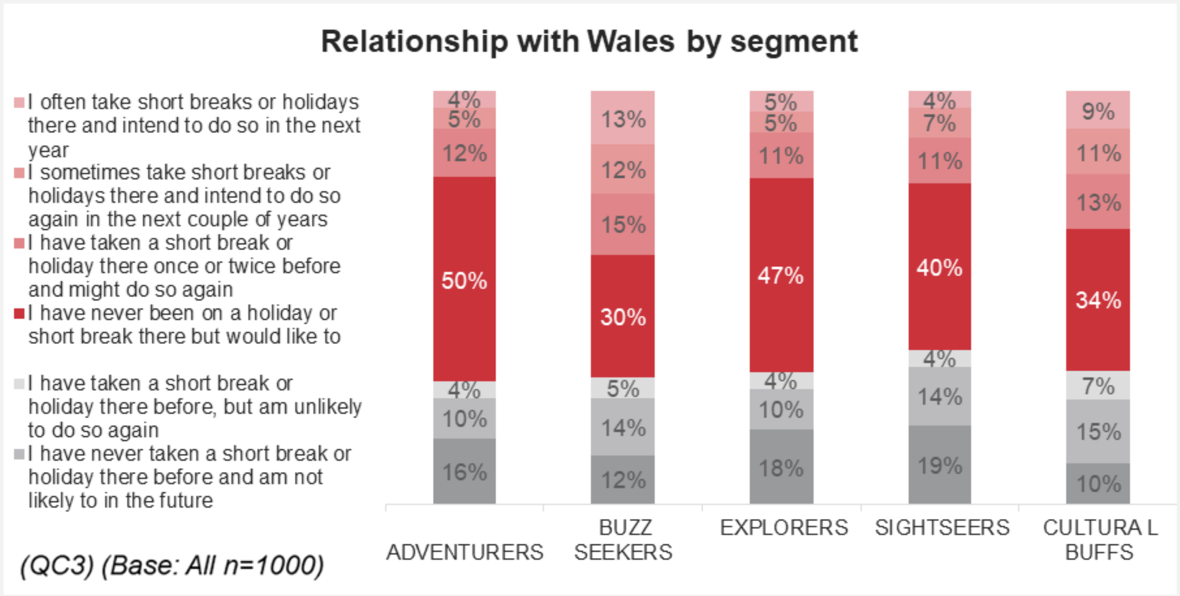


Figure 11



4.3 When looking at previous visitation across segments, Buzzseekers (45%) and Cultural Buffs (40%) have the highest proportion who have visited Wales before. However, Adventurers (50%) and Explorers (47%) have the highest proportion of people who have not visited Wales before but would like to do so in the future. Sightseers have the highest proportion who have not visited before and do not intend to visit in future. There is an opportunity to attract a range of segments that all have a majority that are open to visiting Wales in the future.

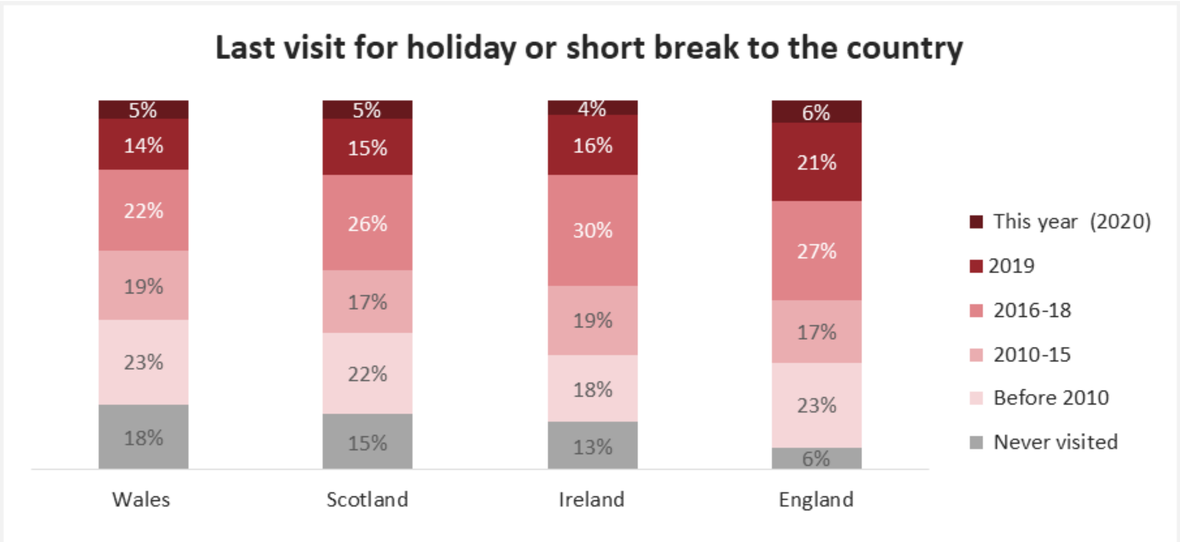
Figure 12



(QC3) (Base: All n=1000)

4.4 England, followed by Ireland and then Scotland are more likely than Wales to have attracted previous visits from Germany including recent visits over the last couple of years. Wales has the highest proportion who have never visited before (18%) compared to Scotland (15%), Ireland (13%) and England (6%).

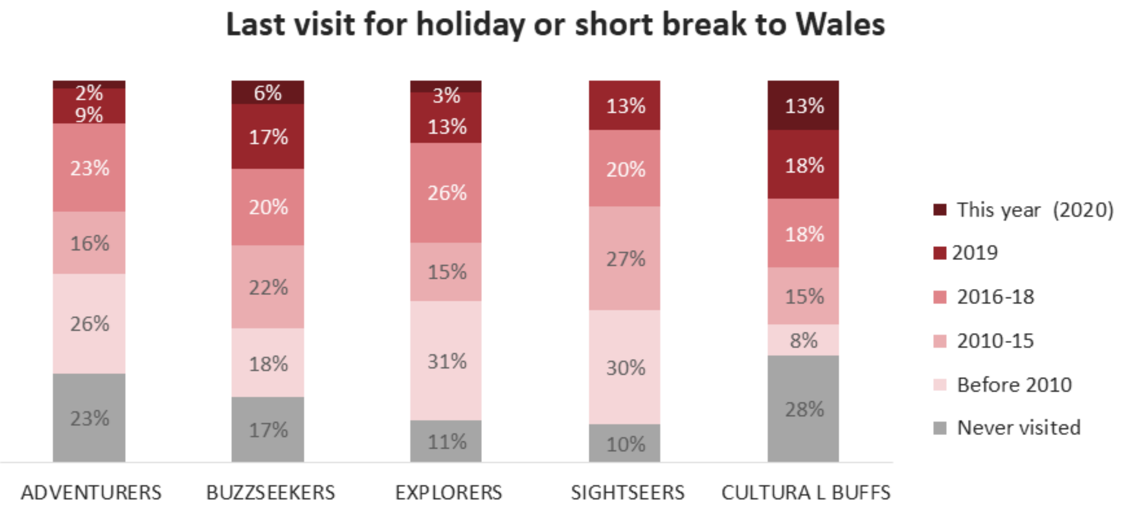
Figure 13



(QC4) (Base: All who have taken holiday/short break in country. Wales: 305, Scotland: 390, Ireland: 388, England: 633)

4.5 When looking across segments, Cultural Buffs and Buzzseekers are most likely to have visited in the last 2 years. However, Cultural Buffs along with Adventurers have the highest proportion who have never visited Wales previously. Explorers and Sightseers have the highest proportion who have visited Wales previously although a high proportion of these visits were a long time ago.

Figure 14



(QC4) (Base: All who have taken holiday/short break in country. Wales: 305, Scotland: 390, Ireland: 388, England: 633)

Consideration of UK destinations for holiday

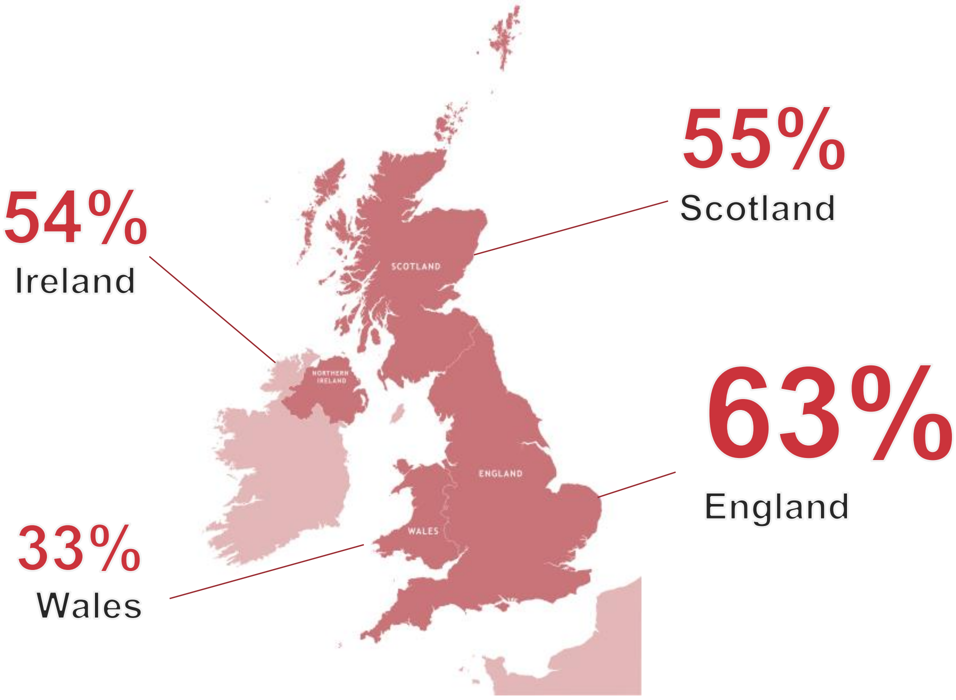
4.6 Consideration of Wales as a place to visit by the German market (33%) is much lower than each of the other countries in the UK (Scotland 55% and England 63%) and Ireland (54%), indicating the challenge for Visit Wales to attract visitors from the German market.

4.7 Adventurers are the German segment most likely to seriously consider Wales for a holiday or short break (39% stating so) and half stating that 'they've never been on a holiday or short break there but would like to'. This is followed by Explorers, with 34% seriously considering, and just under half stating they've never been to Wales on a short break or holiday but would like to. Sightseers are the segment least likely to be seriously considering visiting Wales (23%).

4.8 Previous visitors are equally likely to be seriously considering a visit to Wales as those who'd never been before.

4.9 However, it's worth noting that the German market are significantly more likely to be seriously considering visiting Scotland or Ireland whether they had been before or not.

Figure 15: Proportion seriously considering visiting each country (%)



(QC5a) (Base: All =1000)

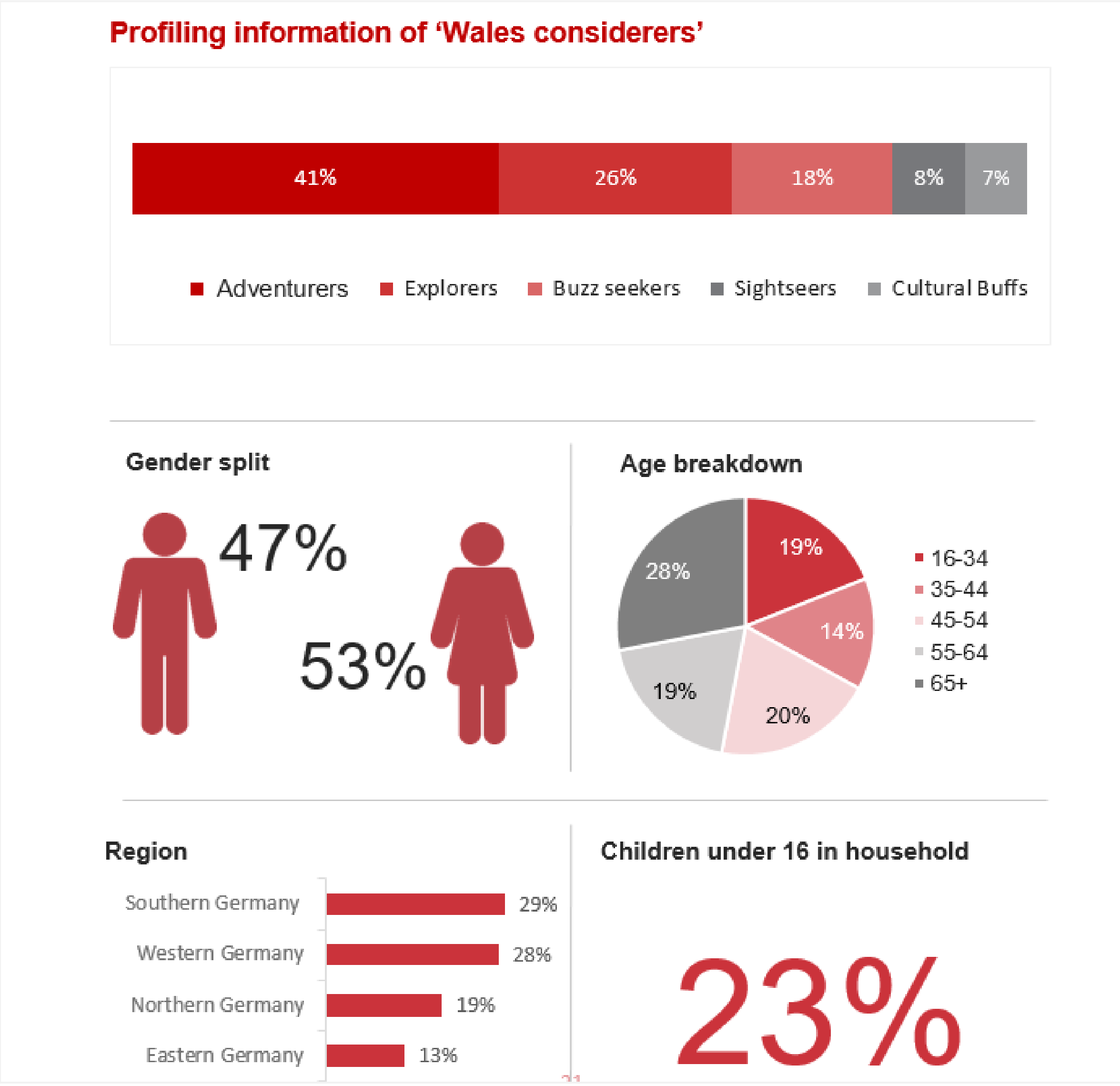
Profile of those considering Wales for a short break or holiday

4.10 Wales considerers are majority female (53%), and have a slightly older age profile, with nearly half (47%) aged 55+. This is in contrast to the Irish market who a higher proportion in the key family age groups 35-54 (45%) compared to a third (34%) of Wales considerers from Germany. Younger people age 16-34 make up around one in five (19%) of considerers from Germany.

4.11 Over two thirds of those considering a trip to Wales are either Adventurers (41%) or Explorers (26%). Buzzseekers make up around one in five Wales considerers (18%), whereas Cultural Buffs and Sightseers are the smallest segments within the 'Wales considerers' audience.

4.12 Wales considerers are more likely to be from Southern and West Germany geographical region of residence. This is in line with consideration for the other countries of the UK, for which Southern and West Germany are also the strongest considerers of a short break or holiday. The majority of those considering visiting Wales (77%) do not have children at home, in line with the older age profile. Less than one in five (23%) considerers from Germany have children at home, which is notably lower than over a third (36%) of considerers from Ireland.

Figure 16



Profile of considerers for each country

4.13 There are similar profiles between those considering Wales, Scotland and Ireland.

4.14 Compared to all 'UK considerers', those considering Wales are more likely to be:

- Adventurers (41% compared to 34% in the market)
- Aged 55+ (47% compared to 43%)
- From a similar regional distribution as considerers for rest of UK

4.15 Conversely, Wales considerers are less likely than the overall market to be:

- Sightseers (8% compared to 11% in the market)
- Aged 16-34 (19% compared to 24%)
- From Eastern Germany (13% compared to 15%)

4.16 All countries index slightly higher than Wales on considerers that are Cultural buffs.

Figure 17

		All UK & Ireland considerers	**Wales considerers**	England considerers	Ireland considerers	Scotland considerers
SEGMENT	Adventurers	34%	**41%**	35%	40%	41%
	Buzz Seekers	20%	**18%**	19%	18%	15%
	Explorers	25%	**26%**	24%	25%	25%
	Sightseers	11%	**8%**	13%	8%	10%
	Cultural Buffs	10%	**7%**	9%	9%	9%
GENDER	Male	49%	**47%**	49%	45%	48%
	Female	51%	**53%**	51%	55%	52%
AGE	16-34	24%	**19%**	23%	21%	19%
	35-44	14%	**14%**	14%	15%	13%
	45-54	19%	**20%**	18%	20%	22%
	55-64	17%	**19%**	18%	19%	18%
	65+	26%	**28%**	27%	25%	28%
CHILDREN IN HOUSEHOLD	Children	24%	**23%**	22%	23%	22%
	No children	76%	**77%**	78%	77%	78%
Region	Northern Germany	18%	**19%**	18%	18%	19%
	Western Germany	28%	**28%**	28%	27%	28%
	Central Germany	10%	**11%**	10%	10%	11%
	Eastern Germany	15%	**13%**	17%	15%	13%
	Southern Germany	29%	**29%**	28%	31%	31%

Reasons for not considering visiting Wales

4.17 There were no overwhelming leading reasons for people not considering visiting Wales. Lack of awareness of what there is to do is the most commonly mentioned reason for not visiting (27% stating this).

4.18 Positively, coming in joint first is that Wales is on the list but they are seeing other places first (27%). By increasing awareness of what Wales has to offer, it is possible that Wales will move up the list of places to visit.

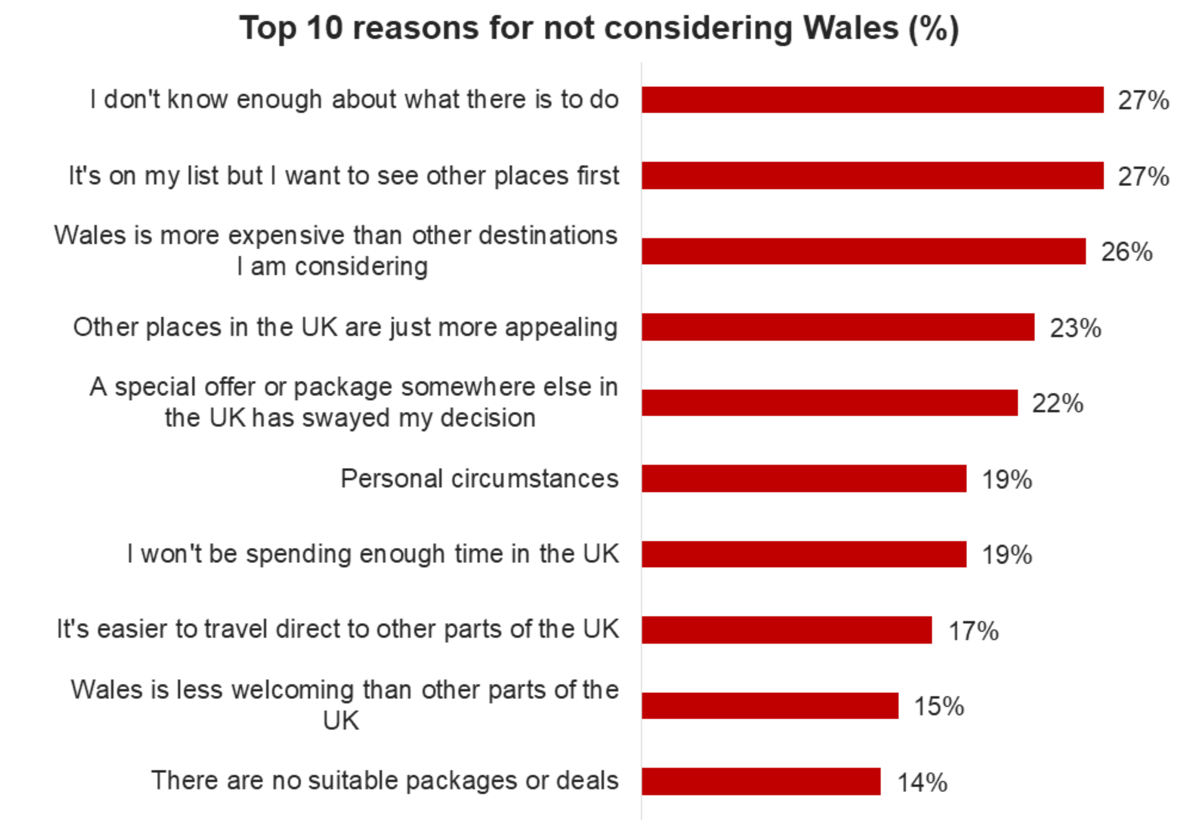
4.19 Just over one in four (26%), believe Wales is more expensive than other destinations they are considering, which is a more prominent barrier for considerers from Germany than Ireland.

4.20 Other notable reasons for not visiting include the appeal (23%) and special offers (22%) elsewhere in UK, which are swaying their decision and that they won't be spending enough time in the UK to visit Wales (19%). This indicates many prospective visitors are putting other destinations in the UK ahead of visiting Wales.

4.21 Awareness of what there is to do in Wales is lowest amongst Sightseers. This segment are also the most likely to seek out options in the UK that are easier to travel to direct.

4.22 Factors that were less important to the German holiday / short break travellers not choosing Wales were that it's too busy / over-crowded (only 4%) or that there is no suitable accommodation available (only 5%).

Figure 18



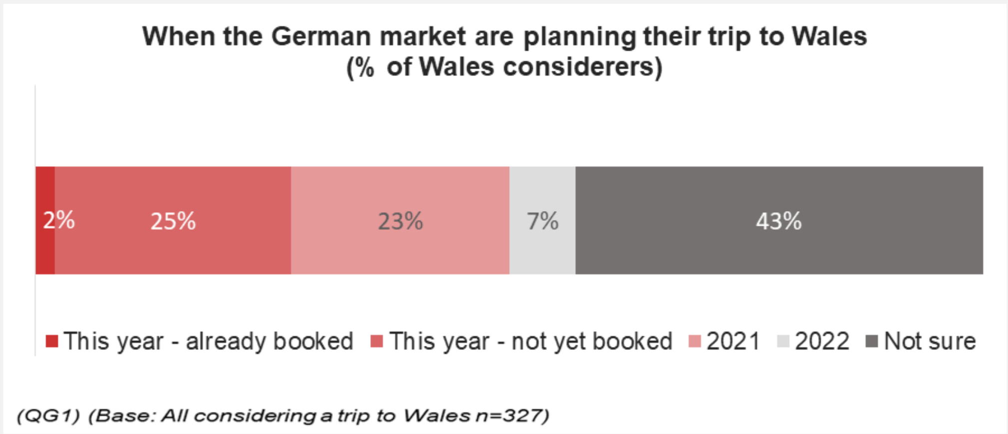
(G15) (Base: All not considering Wales n=673)

5. Visiting Wales

Timing of anticipated trip to Wales

5.1 Of those within the German market seriously considering visiting Wales in the next 12 months, only 2% had already booked a trip for 2020 at the time of the survey in early March. A further 1 in 4 were planning a trip in 2020 but had not yet booked it. The remainder were either planning a trip in 2021 and beyond, or weren't sure. The impact of the Covid19 outbreak is expected to have been a major barrier on the ability of the German market to have taken a holiday in the UK in 2020.

Figure 19

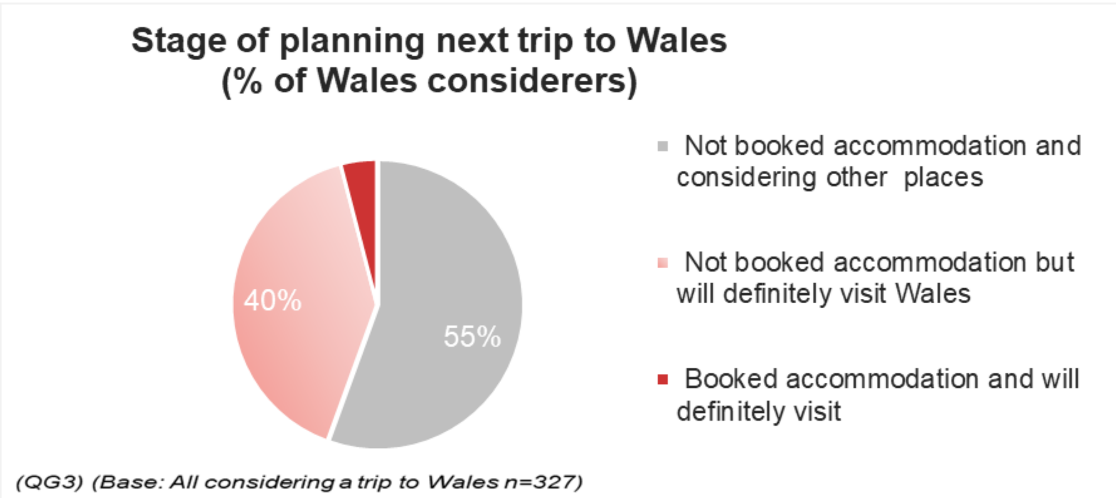


Stage of planning next trip to Wales

5.2 In line with when considerers anticipated visiting Wales, only a small minority had booked their accommodation (4%). Positively, 2 in 5 considerers stated they would definitely visit Wales, even though they were yet to book their accommodation. However, over half had not booked and were considering other places.

5.3 Amongst the segments, Explorers and Adventurers are more likely to still be at the 'not booked and considering other places' stage. Buzzseekers and Sightseers are more likely to have not booked accommodation but will definitely visit Wales.

Figure 20



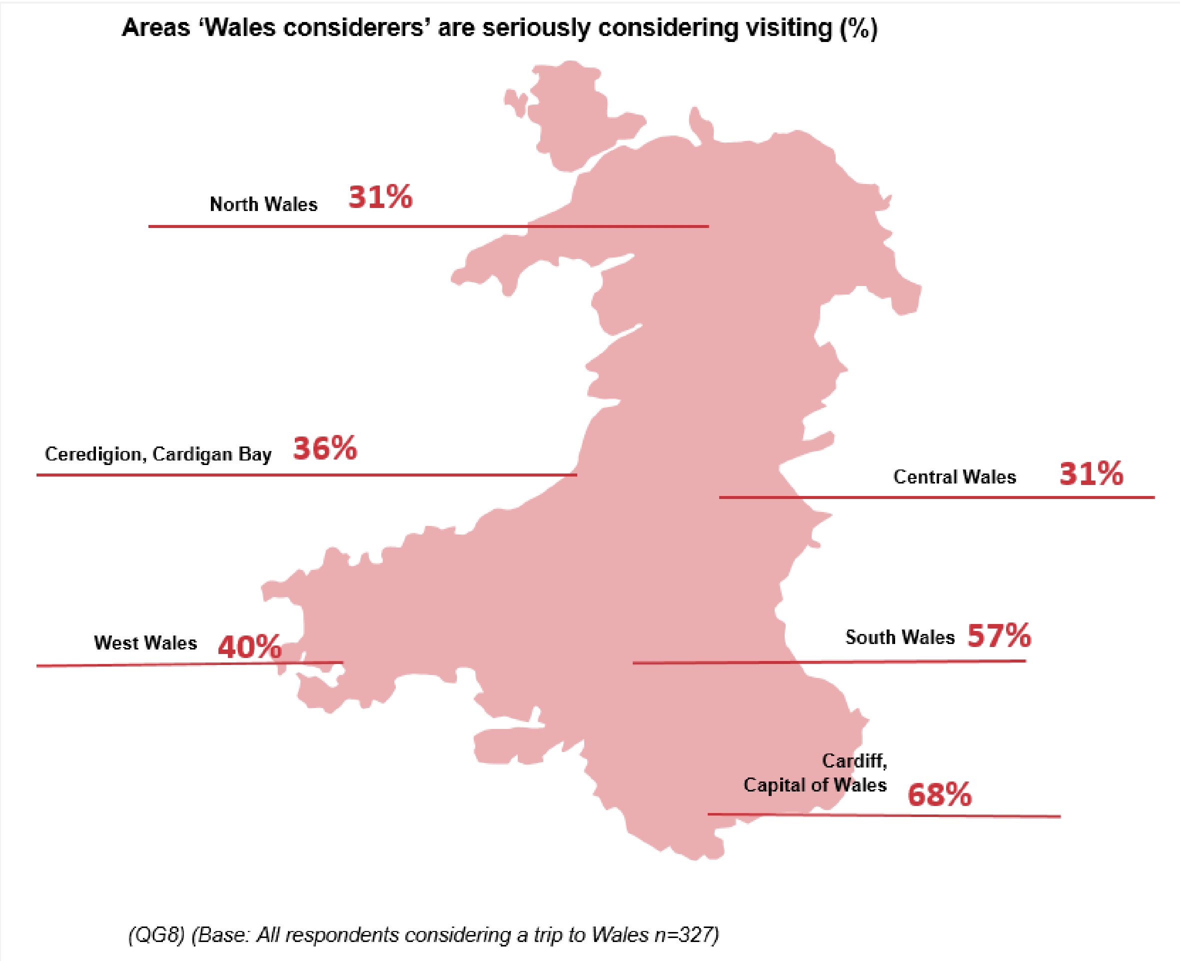
Where intending to visit in Wales

5.4 Visitors from the German market are most likely to be planning to visit areas in South Wales, but there is interest in visiting across most parts of Wales. The interest is car touring holidays suggest German visitors could be encouraged to explore many different parts of Wales during their trip or via repeat visits.

5.5 Cardiff is the destination they are most likely to visit, 68% stating they would do so, followed by South Wales (57%). West Wales (40%) was the next most popular. The North and Central Wales were the least likely to be visited with just under a third seriously considering those areas. Given the German market's interest in the outdoors, promotion of those areas may increase interest, particularly given how popular North Wales is amongst other markets.

5.6 When asked to write in where in Wales they would consider visiting, the German market primarily mentions Cardiff. Along with this they mention combinations of visiting the capital city and Snowdon or a road trip to explore as much as possible.

Figure 21

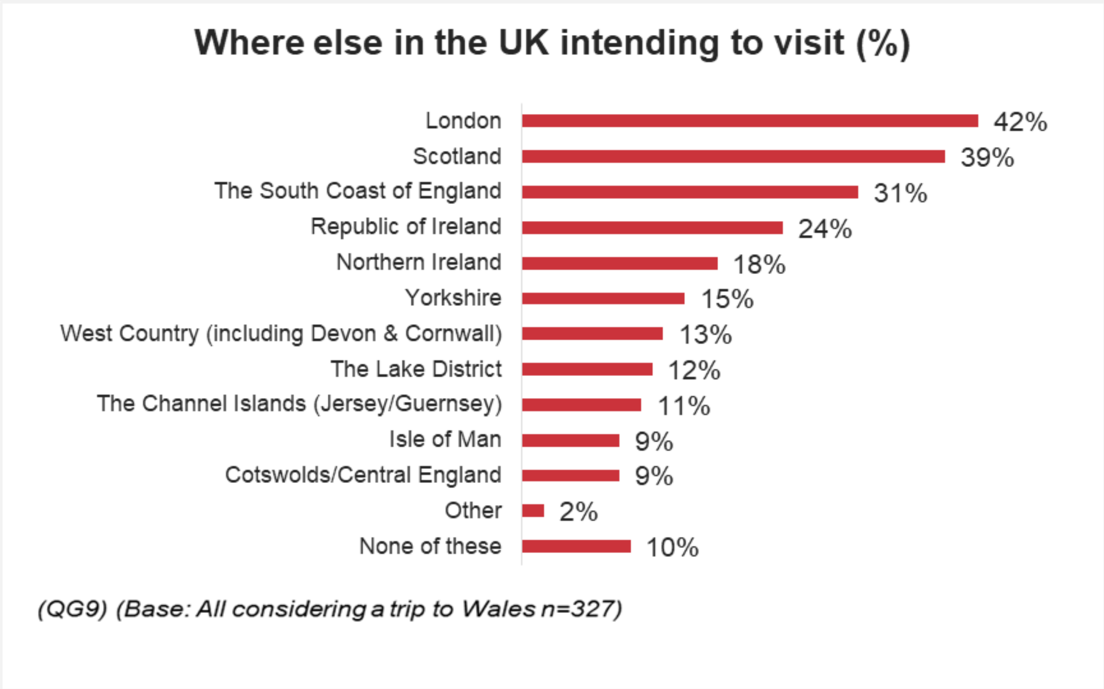


Where else visiting in UK

5.7 Almost all of those considering a trip to Wales intend to visit other parts of the UK during their planned trip to the UK. London (42%) and Scotland (39%) and South Coast of England (31%) and Ireland are the most popular areas to also visit while the Cotswolds / Central England and the Isle of Man (9%) are the least popular areas stated. Only 2% opt for other areas in the UK not highlighted here, suggesting that the majority of Germans do target the best known 'tick box' destinations.

5.8 The plans to visit multiple destinations indicate the opportunity to promote itineraries that combine a trip to Wales with other popular destinations in UK and Ireland.

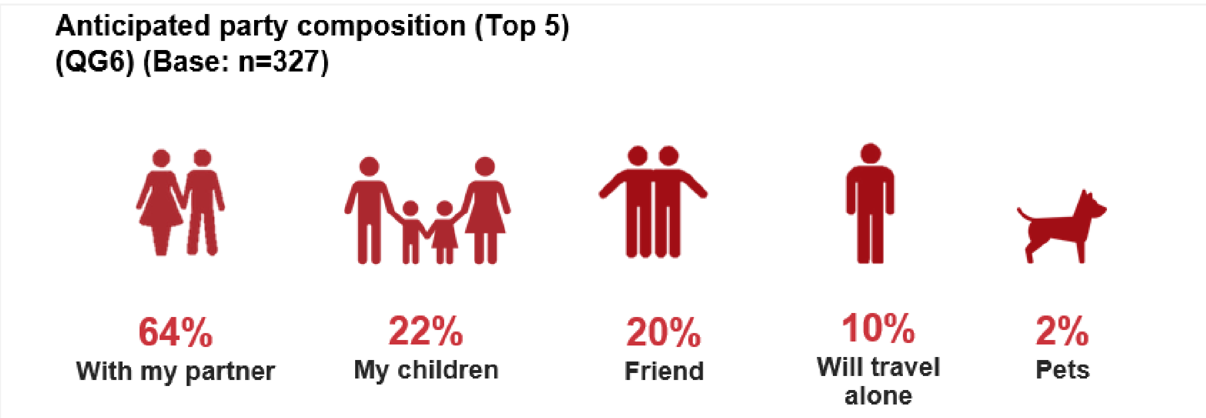
Figure 22



Anticipated party composition for next trip to Wales

5.9 Wales considerers from Germany are most likely to visit with their partner (64%). Around one in five are likely to visit with their children (22%). One in five German travellers (20%) are likely to visit with their friend/s.

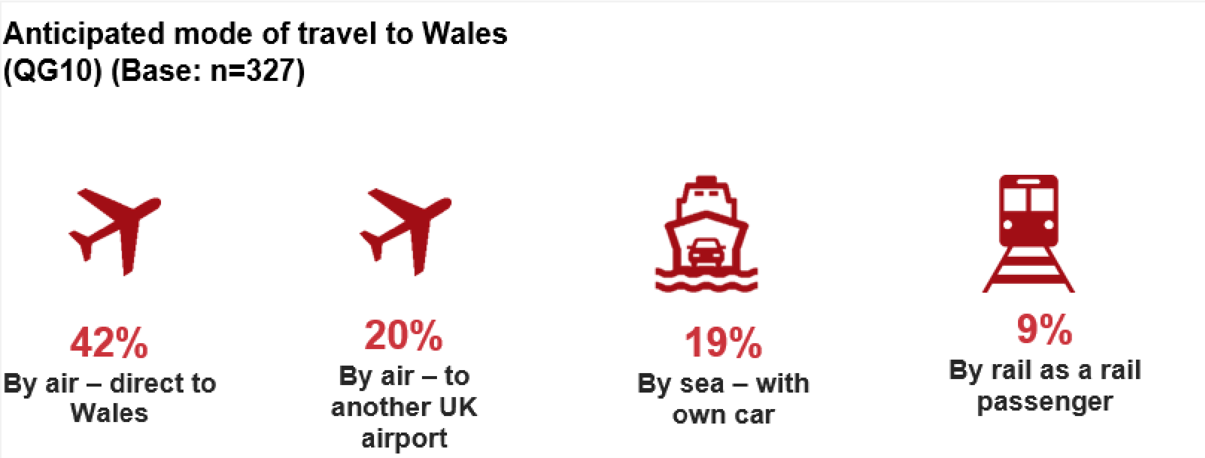
Figure 23



Anticipated mode of travel to Wales

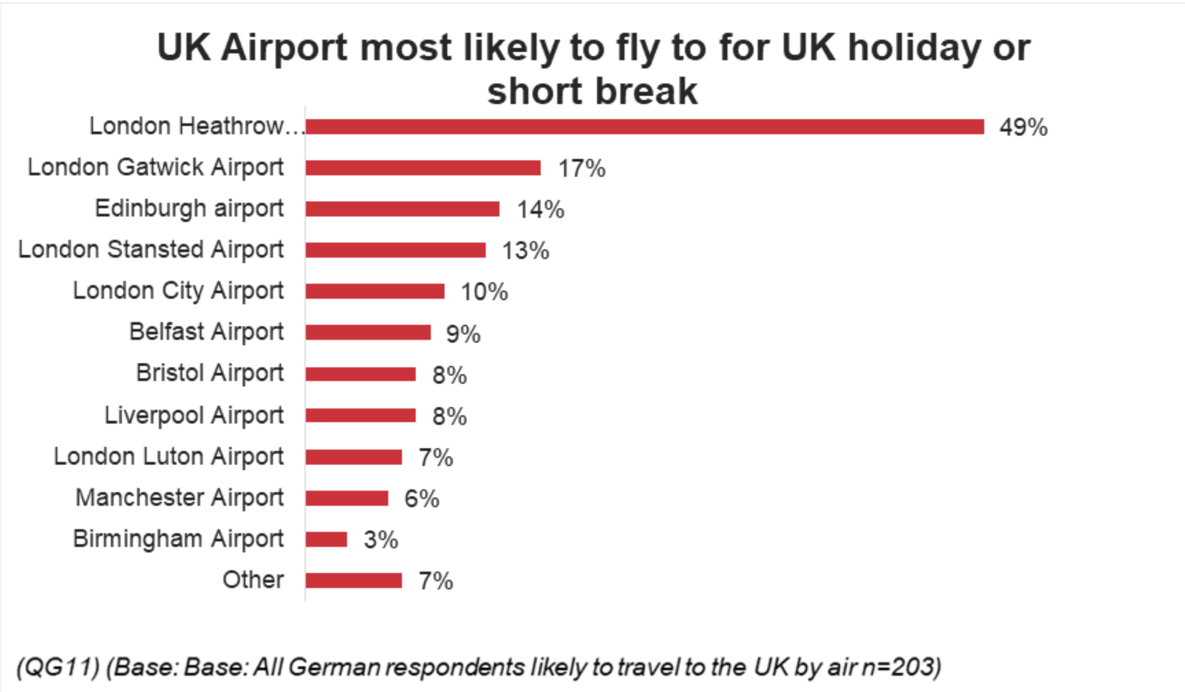
5.10 The German market are most likely to be planning to travel by air direct to Wales (42% stating this), followed by air-to another UK airport (20%). Interestingly, the number of those considering reaching Wales by air travel to another UK airport is similar to those who would opt to travel by sea with their own car.

Figure 24



Despite the proximity of Bristol airport to Wales, Heathrow is significantly more popular to fly to, as well as Edinburgh, further indicating that a trip to Wales has a high potential to be combined with other parts of the UK.

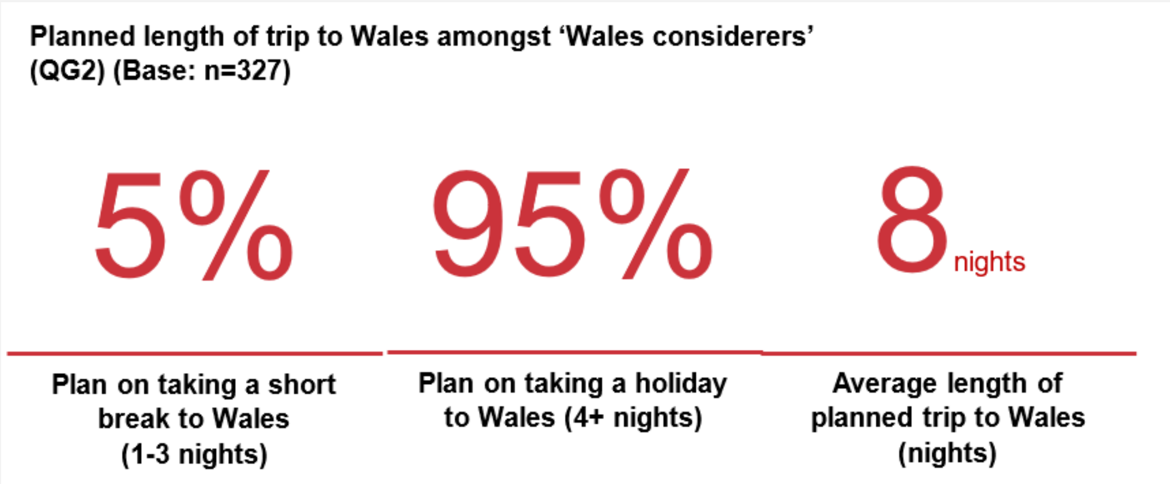
Figure 25



Length of anticipated trip to Wales

5.11 Of those within the German market considering a trip to Wales, the vast majority (95%) plan on taking a trip of 4+ nights. Wales' considerers anticipate taking an average length trip of just over a week in Wales, significantly higher than amongst the Irish and UK markets.

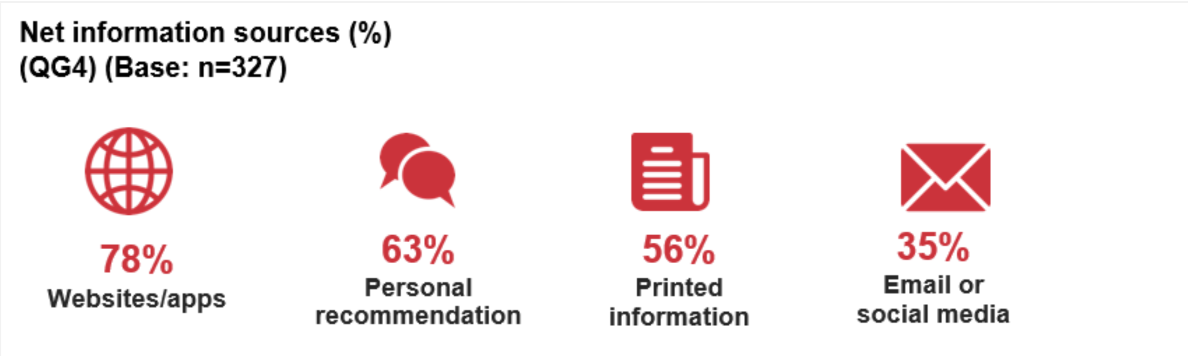
Figure 26



Anticipated information sources to plan next trip to Wales

5.12 The German market anticipating a visit to Wales are most likely to plan through websites and apps, 78% stating this as well as through personal recommendation (63%). Printed information is more important to the German market (56%) than it is for the Irish market (34%) when planning a trip, while email or social media are less important to the German market (35%) than the Irish market (43%).

Figure 27



5.13 While conversations with friends and family who have visited is the biggest anticipated information source for a trip to Wales with 49% stating this, the second most important source is printed travel guide books/brochures (44%). Meanwhile only one in five plan to visit the tourist board website.

Figure 28

Anticipated information sources for trip to Wales (%)

(QG4) (Base: All considering a trip to Wales n=327)

Anticipated booking channels for next trip to Wales

5.14 Travel websites are the channel Wales considerers are most likely to book accommodation with (54% stating this), followed by 'directly with an accommodation provider' (34%). Travel agents are also more popular as a source of booking by German visitors with one in five anticipating booking in-store or via an agent website.

Figure 29: Accommodation booking channels sources for trip to Wales (% listed)

(QG5) (Base: All considering a trip to Wales n=327)

5.15 Booking direct with accommodation providers or via a travel website are more popular across all segments of the market.

5.16 Adventurers are the most likely to intend to book via a travel website (59% vs an average 54%). Explorers and Sightseers are the most likely to book in the store of a travel agent. Buzzseekers and Cultural Buffs meanwhile are the most likely to plan booking via a Homestay website.

Figure 30: Top 3 accommodation booking channels for trip to Wales by segment (% listed)

(QG5) (Base: All respondents seriously considering atrip to Wales Adventurers n=135 ; Buzzseekers n=59 ; Explorers n=84 ; Sightseers n=26; Cultural buffs n=23*)*

**Caution base low*

Adventurers	Buzzseekers	Explorers	Sightseers	Cultural buffs
A travel website 59%	A travel website 49%	A travel website 50%	A travel website 50%	A travel website 52%
Directly with an accommodation provider 38%	Directly with an accommodation provider 39%	Directly with an accommodation provider 30%	Directly with an accommodation provider 31%	A Homestay website 26%
A tourist information centre / tourist board 24%	A Homestay website 31%	In the store of a travel agent 29%	In the store of a travel agent 23%	Directly with an accommodation provider 22%

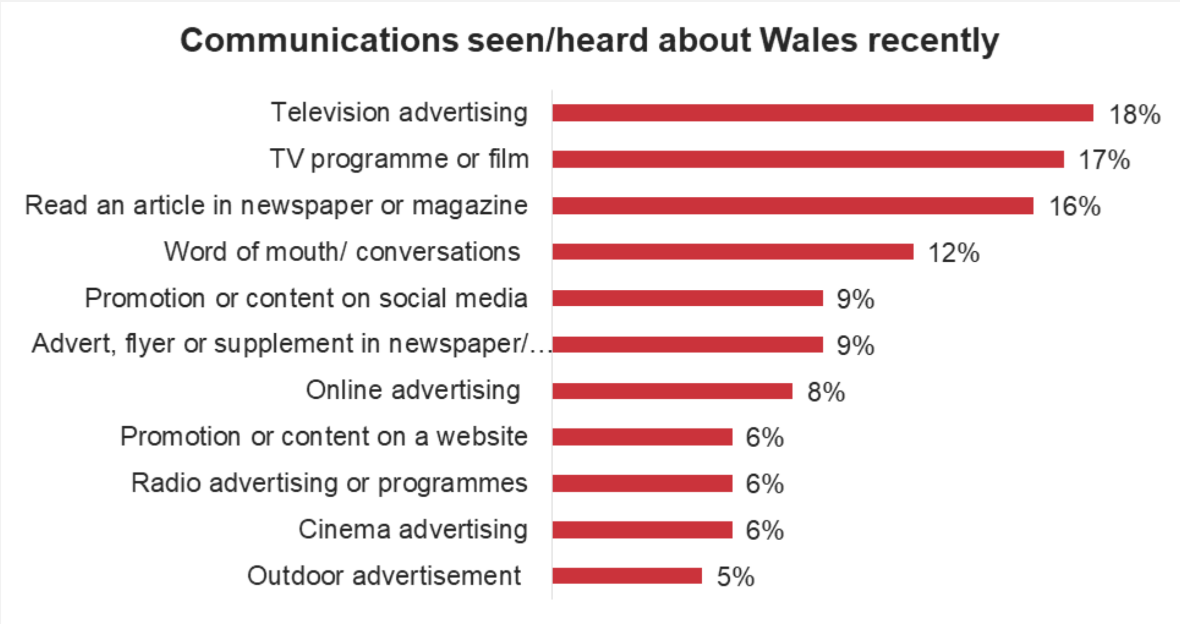
6. Contact with Visit Wales

Recent communication seen/heard about Wales recently

6.1 Unprompted, just under 1 in 5 (18%) of the German market recall seeing television advertising about Wales recently and 17% recall hearing about Wales in a TV programme or film. Reading an article in a newspaper or magazine was third highest for unprompted recall (16%). There was lower recall of hearing about Wales in outdoor advertisement (5%) in cinema ads (6%) and on the radio (6%).

6.2 Generally, Cultural Buffs and Buzz Seekers have the highest recall, with only a third stating that they had seen ‘none of these’. Sightseers (64% none of these) and explorers (61% none of these) meanwhile have the lowest recall.

Figure 31



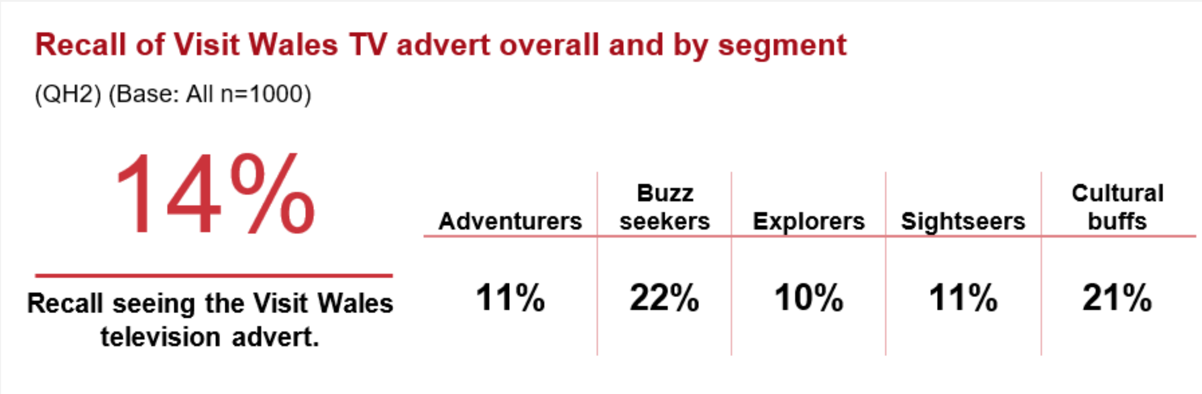
(QH1) (Base: All n=1000)

Recall of Visit Wales television advertising (prompted)

6.3 Only 14% of the German market recall seeing the recent Visit Wales television advert, although this will be impacted by the timing of the research in early March 2020. Surprisingly, Adventurers and Explorers who are most likely to consider Wales for a trip are the least likely to recall they have seen the TV advert. The Cultural Buffs meanwhile who are the least likely to consider Wales are amongst those with the highest prompted recognition of the advert.

6.4 It’s worth noting that the research was conducted at the start of the television advertising cycle in 2020.

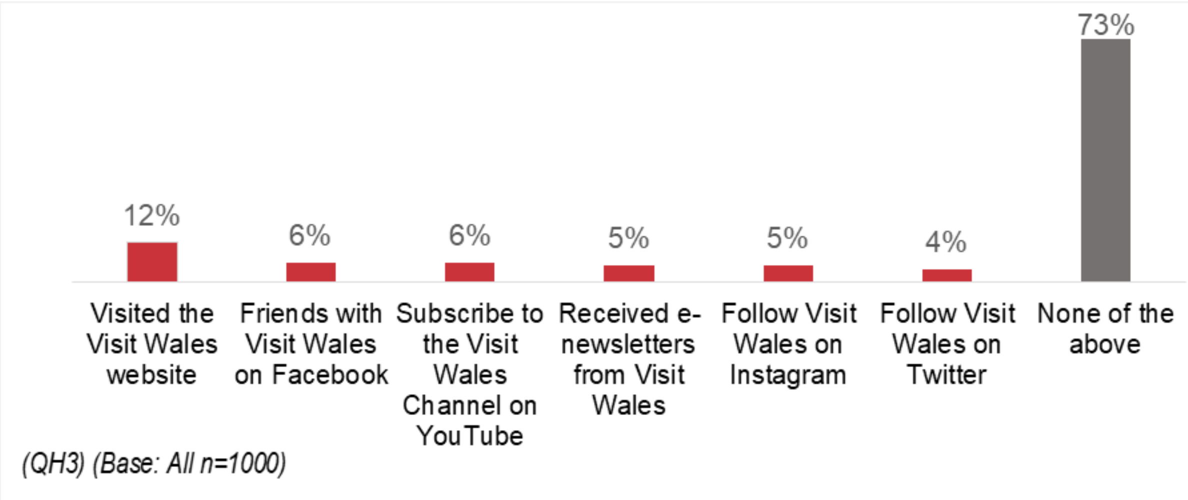
Figure 32



Engagement with Visit Wales communications in the last 12 months

6.5 The most commonly used channel to engage with Visit Wales is the website with 12% visiting the site in the last 12 months. A small minority have also engaged with the range of Visit Wales social media channels.

Figure 33: Engagement with Visit Wales in the last 12 months



6.6 Amongst the segments, Buzz Seekers are most likely to have visited the Visit Wales website (22%) and a half have engaged with any of the Visit Wales channels. Cultural Buffs also report above average web visits and engagement, especially Facebook.

6.7 Explorers, Adventurers and Sightseers are much less likely to have visited the website or engaged with any Visit Wales channels.

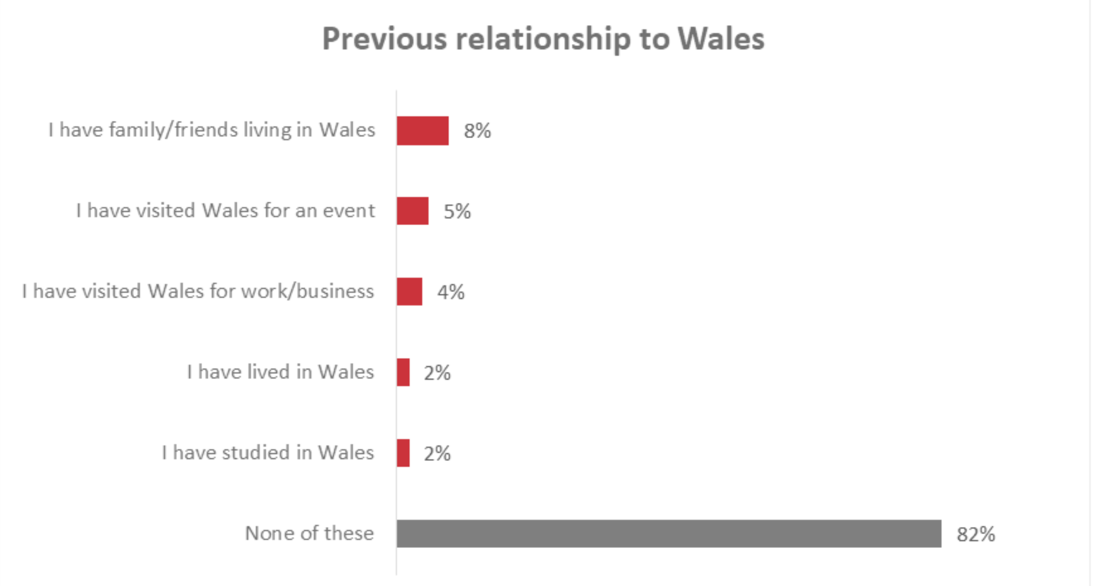
Figure 34: Engagement with Visit Wales in the last 12 months amongst segments

(QH3) (Base: Adventurers n=344; Buzzseekers n=200; Explorers n=246; Sightseers n=114; Cultural buffs n=96)

	Adventurers	Buzzseekers	Explorers	Sightseers	Cultural Buffs
Visited the Visit Wales website	10%	22%	7%	9%	14%
Received e- newsletters from Visit Wales	3%	10%	3%	4%	8%
Follow Visit Wales on Twitter	1%	8%	2%	2%	9%
Friends with Visit Wales on Facebook	2%	11%	2%	2%	19%
Subscribe to the Visit Wales Channel on YouTube	3%	11%	4%	5%	8%
Follow Visit Wales on Instagram	3%	10%	3%	4%	11%
Any of the above	**19%**	**50%**	**15%**	**18%**	**46%**

6.8 The German market has a relatively low frequency of wider relationships with Wales, with 8% having friends or family living there, but a low proportions having visited for events, work or to study. Visits to friends and relatives would therefore be the largest opportunity to target prospective leisure visits.

Image 35



(QX9) (Base: All respondents: 1000)

7. Key Findings & Implications

7.1 When the research was conducted in early March 2020, intentions to visit the UK for a holiday or short break amongst the German market were relatively consistent with the previous 12 months. Although this is almost certain to have changed following the Coronavirus pandemic, it does reveal some stability in attitudes to taking trips to the UK.

7.2 Notably, desire to take domestic trips within Germany, or trips to Mainland Europe was set to increase in the next 12 months while longer haul trips to the rest of the world were set to decline. This does suggest that – with the right conditions - there is potential to increase trips to the nearby UK as well.

7.3 Environmental concerns are particularly important for the German market, which can be beneficial for travel to the UK as travel there is perceived as being ‘nearby so reducing impact on environment’. That said, should Germans take the more environmentally friendly transport options such as train or car, access to some of Wales’ destinations becomes more challenging. Highlighting transport links from key ports will be important to facilitate this travel.

7.4 There are a number of perceived barriers to visiting the UK for a holiday or short break such as perceived expense and the weather. Concerns over Brexit are also particularly strong with just under half of Germans citing it as an influence. This highlights the importance of communicating certainty around travel to the UK post transition.

7.5 The German market have a net positive impression of the UK – ‘reasons for visiting’ indexing higher than ‘barriers to visiting’ – a positive indicator for future visits.

7.6 The German market are most likely to be considering trips to the UK for a ‘heritage’ trip and ‘city break’ trip. Their importance suggests a need to continue to promote them within Visit Wales communications.

7.7 Positively, amongst the German market there is a strong appetite for outdoor activities such as walking and hiking and seeking out incredible scenery and landscapes, both of which are product strengths for Wales.

7.8 Amongst the segments, Adventurers and Explorers are most likely to consider a trip to Wales. These two segments are most drawn in by walking, hiking and rambling activities as well as visiting heritage sites and attractions. Adventurers in particular are the segment most likely to visit a travel website, so emphasising the appeal of Wales via this channel may help to draw this audience.

7.9 A key challenge in driving visits to Wales is familiarity with what the country has to offer. The German market is less familiar with Wales than it is with any other country within the UK. Familiarity with Wales correlates with relatively lower visit consideration, and it is a reason directly given for not visiting. This validates the need for continued promotion of Wales to the German market.

7.10 Raising the awareness of what there is to do in Wales should be combined with highlighting the affordability and variety of things on offer in Wales, uncertainty in this area also raised as a barrier to visits.

7.11 It’s worth noting that familiarity isn’t always a proxy for consideration to visit. Scotland scores higher than Wales on almost all destination type associations – particularly those most important to the German market – highlighting the importance of a healthy brand. This further underlines the importance of strong Visit Wales marketing.

7.12 Wales considerers still need convincing that Wales should be their chosen destination in the near future, around half of those considering Wales for a short break or holiday having not yet booked and were considering other places.

7.13 The overwhelming majority of the German market consider Wales for a longer trip rather than a weekend break, and intend to combine this with visiting other parts of the UK. As such, there may be potential to highlight within communications the easy touring options that cater to this.

7.14 A range of sources will need to be used to convert the German market to visitors – online sources, especially travel websites, are important in planning as are print sources which are more used for information than social media.

8. Appendix

Methodology

8.1 Respondents were contacted though an online panel which could be completed via desktop or mobile device. A combination of panels were used, with Dynata being the lead panel provider

8.2 Fieldwork took place from **27th February to 9th March 2020**, prior to the main COVID-19 outbreak and restrictions in the UK. The survey took 20 minutes to complete on average.

8.3 To ensure quality of responses, a number of steps were put in place during and following the survey:

(1) At the start of the survey, respondents were given a ‘trap question’, to screen out those providing affirmative responses for the sole purpose of qualifying for the survey. The question asked respondents to indicate the continents they had visited for a holiday in 2019. Respondents that ticked all boxes were screened out.

(2) Flat-liners – respondents that provided similar responses to all rating questions were removed from the survey

(3) Speeders – respondents that completed the survey in an unrealistically quick time were removed from the survey

(4) Data tables were checked against the raw data

(5) All stages were conducted in line with ISO20252

8.4 There were 1,000 completed surveys.

Sample definition

8.5 To qualify for the survey, participants had to fulfil the following criteria:

- Must be a holiday or short break decision-maker
- Must be *seriously* considering taking a holiday or short break in the UK in the next 12 months.

Base sizes and statistical reliability

8.6 Different sub-groups were referred to throughout this report, and it is essential the reader is aware of their base sizes and the statistical reliability of the figures presented. In some cases, base sizes are low, so should be treated with caution. The table below demonstrates the margins of error at a 95% confidence level for some of the key sub-groups used within the report.

Figure 35

Size of sample or sub-group on which survey result is based	10% or 90% ±	30% or 70%±	50%±
ALL RESPONDENTS (1000)	1.9	2.8	3.1
WALES CONSIDERERS (327)	3.3	5.0	5.4
Northern Germany (179)	4.4	6.7	7.3
Western Germany (281)	3.5	5.4	5.9
Central Germany (101)	5.9	8.9	9.6
Eastern Germany (152)	4.8	7.3	8.0
Southern Germany (287)	3.5	5.3	5.8
Adventurers (344)	3.2	4.8	5.3
Buzz Seekers (200)	4.2	6.4	6.9
Explorers (246)	3.8	5.7	6.3
Sightseers (114)	5.5	8.4	9.2
Cultural Buffs (96)	6.0	9.2	10.0

Methodology limitations

8.7 As with all surveys of this type there are some limitations with the survey methodology. The key limitations are:

- **Self-selecting bias:** The respondents within this survey are 'self-selecting', meaning that they have put themselves forward to complete the research. This naturally creates a bias in the type of respondent that answer the survey. For example, they tend to be more proactive individuals than the population on average, and may therefore index higher in their likelihood to visit UK destinations. Furthermore, as people who regularly respond to surveys of all different types, they are likely to have more developed opinions on a range of matters than average
- **Online sample:** Although the majority of Germans are now online, 'online literacy' remains lower for the older populations, so it is likely that this age group will be disproportionately impacted by the self-selecting bias
- **Sample selection bias:** The sample for this survey is chosen based on their responses that they are a holiday or short break decision-maker and are *seriously* considering taking a holiday or short break in paid-for accommodation

in the UK in the next few years. This may mean they are not fully representative of the wider German population and inferences are limited on this basis.

- **Hypothetical responses:** Some responses will be based on hypothetical projections, and should be reviewed in this light. Examples of this include questions around predicted booking and travel behaviour when visiting Wales.
- **Conflicting influences:** For some sub-groups, responses will be influenced by factors beyond the sub-group's self-contained definition. For example, for questions about previous visits to Wales, 'region of residence' is a leading influence (distance being a key barrier to visiting). If a priority segment disproportionately lives a long way from Wales, their likelihood to visit will be lower because of where they live, as opposed to because of their segment preferences.

8.8 It is important to note that these limitations will be consistent across survey waves, so any movements in responses will be driven by legitimate factors, outside of the methodology.