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Tourism Market Demand Report: Ireland 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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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.
This document is also available in Welsh.

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Visit Wales

Market Study Summary Report

Ireland

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 wave.

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

Methodology

1.5 Respondents were contacted through an online panel which could be completed via desktop or mobile device.

1.6 Fieldwork took place from **20th February to 2nd March 2020**, prior to the main covid outbreak and restrictions in the UK. There were 600 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 very/fairly likely to be taking a holiday or short break in paid-for accommodation in the UK in the next few years.

2. Headline Findings

0
Percentage point
Net increase in intention to take trips to UK in next 12 months

22
Percentage point
Net increase in intention to take trips in Ireland in next 12 months

5
Percentage point
Net increase in intention to take trips to Mainland Europe in next 12 months

-17
Percentage point
Net decrease in intention to take trips to Rest of the World in next 12 months

Top barriers to visiting the UK

- **43%** Exchange rates
- **38%** Personal circumstances
- **33%** Uncertainty around Brexit

Top reasons for visiting the UK

- **59%** Convenient flight connections
- **52%** Have friends & family living there
- **51%** There's lots of different places to visit

Most likely to consider a trip in the UK to visit:


Cities and large towns
73%


Historic and heritage towns
63%


Scenic countryside & Villages
54%


Scenic coastline and harbours
50%

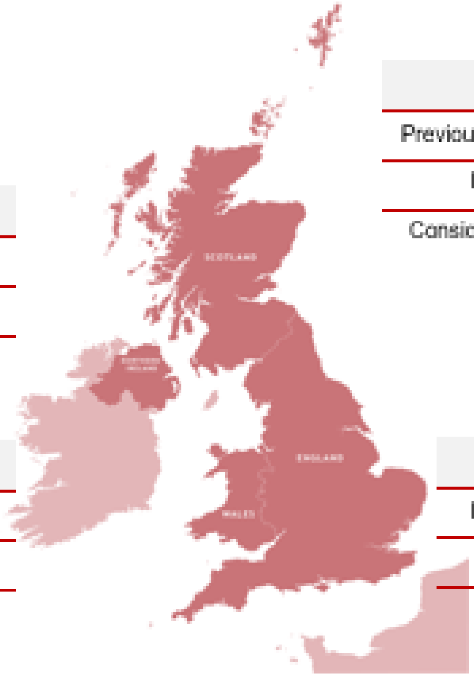
Wales is most associated with scenic countryside and villages and scenic coastline and harbours

6

Relationship with countries in the UK

Northern Ireland	
Previously visited	67%
Familiarity	44%
Consider visiting	44%

Scotland	
Previously visited	53%
Familiarity	25%
Consider visiting	52%

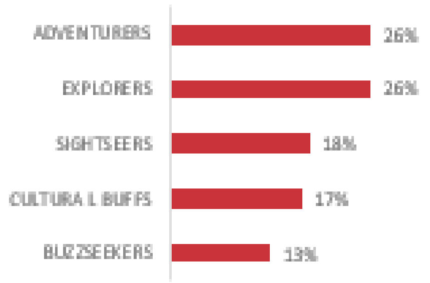


Wales	
Previously visited	47%
Familiarity	21%
Consider visiting	33%

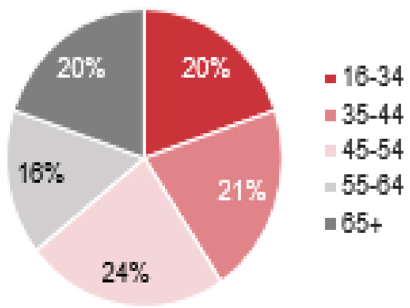
England	
Previously visited	85%
Familiarity	52%
Consider visiting	68%

Demographics of the Irish market considering a trip to Wales

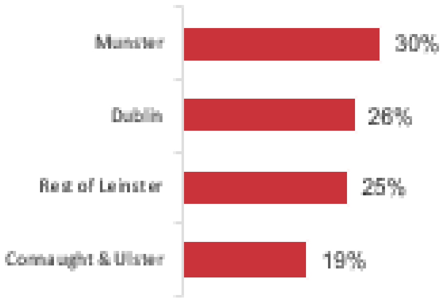
Segments



Age breakdown



Region of origin



Children under 16 in household

36%

Top 5 reasons for not visiting Wales:

35%
I don't know enough about what there is to do

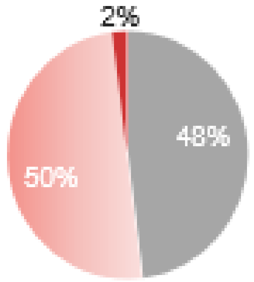
35%
It's on my list but I want to see other places first

32%
Other places in the UK are just more appealing

26%
It's easier to travel direct to other parts of the UK

25%
A special offer or package somewhere else in the UK has swayed my decision

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



- Not booked accommodation and considering other places
- Not booked accommodation but will definitely visit Wales
- Booked accommodation and will definitely visit

Top 3 places intending to visit

55% Cardiff

40% Snowdonia Mountains & Coast

30% Swansea Bay, Mumbles, Gower, Afan & the Vale of Neath

Planned length of trip to Wales amongst 'Wales considerers'

39%
Plan on taking a short break to Wales (1-3 nights)

61%
Plan on taking a holiday to Wales (4+ nights)

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

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

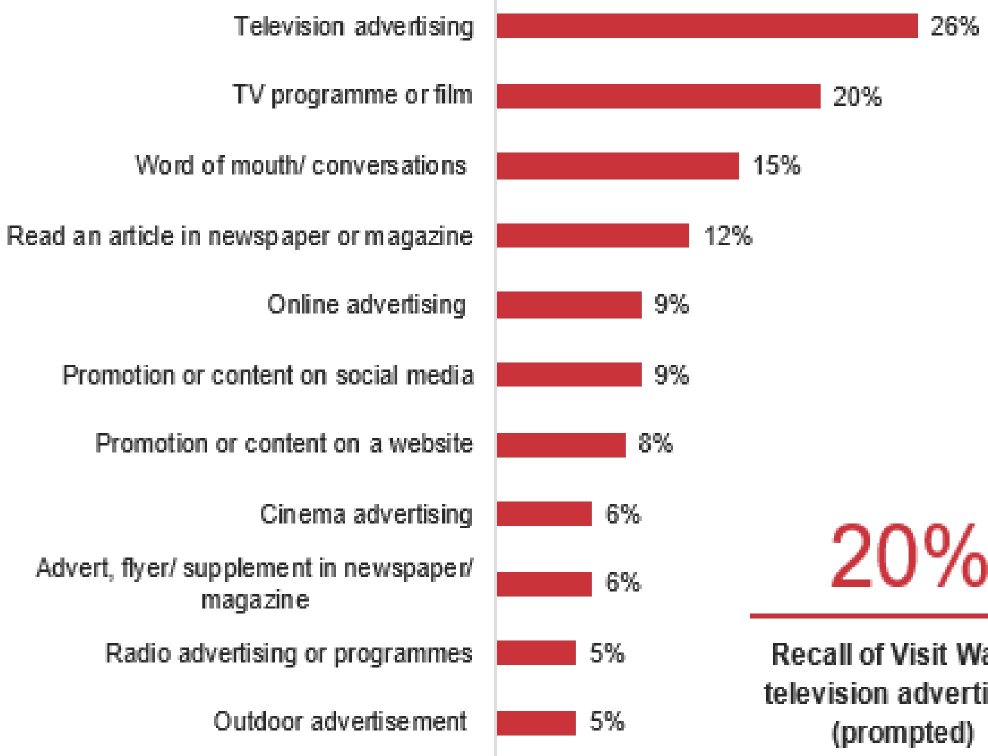
76% Websites/apps

63% Personal recommendation

43% Email or social media

34% Printed information

Communications seen/heard about Wales recently



20%

Recall of Visit Wales television advertising (prompted)

34%

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

Anticipated mode of travel to Wales

48% By sea – with own car

31% By air – direct to Wales

16% By air – to another UK airport

3. Influences on holiday & short break behaviour

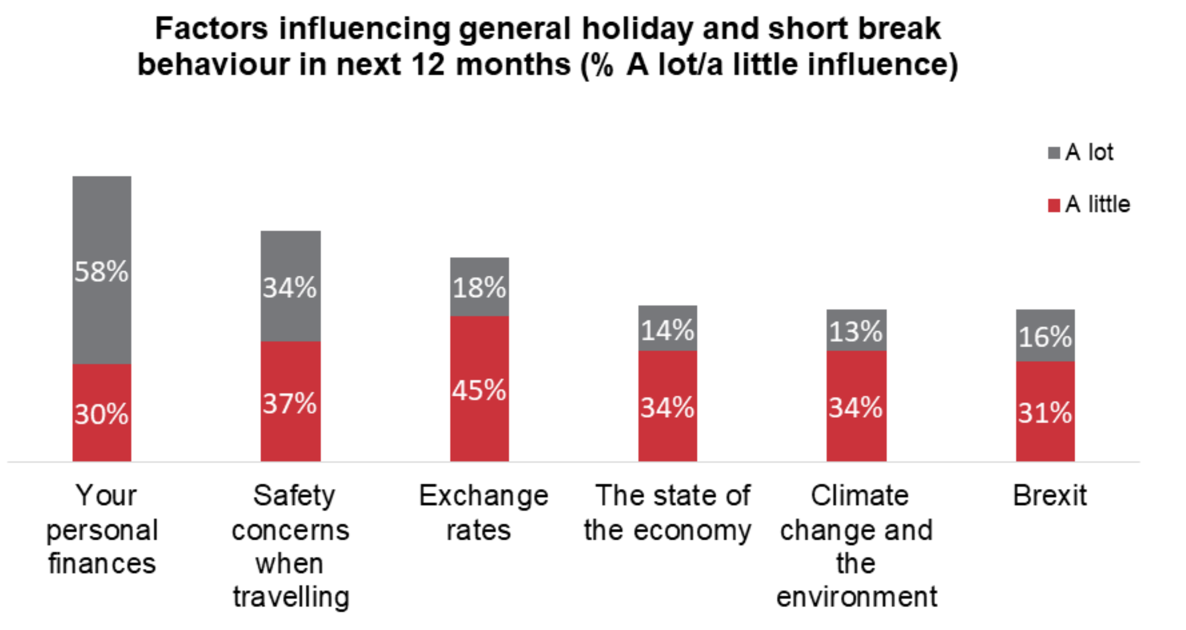
Main influences on holiday and short break behaviour

3.1 ‘Personal finances’ is the factor most likely to influence the Irish market’s holiday and short break decision-making in 2020 (88% citing it as having a lot/little influence), followed by ‘concerns over safety’ (71%). Linked to personal finances, ‘exchange rates’ and ‘the state of the economy’ are also important.

3.2 Although ‘climate change’ and ‘Brexit’ are less of an influence than the other factors, they have at least some influence for nearly half of the Irish market (each a lot/little influential for half the market).

3.3 The Coronavirus was not spontaneously mentioned by respondents but this is likely due to the timing of the survey before the virus escalated on a global scale.

Figure 1

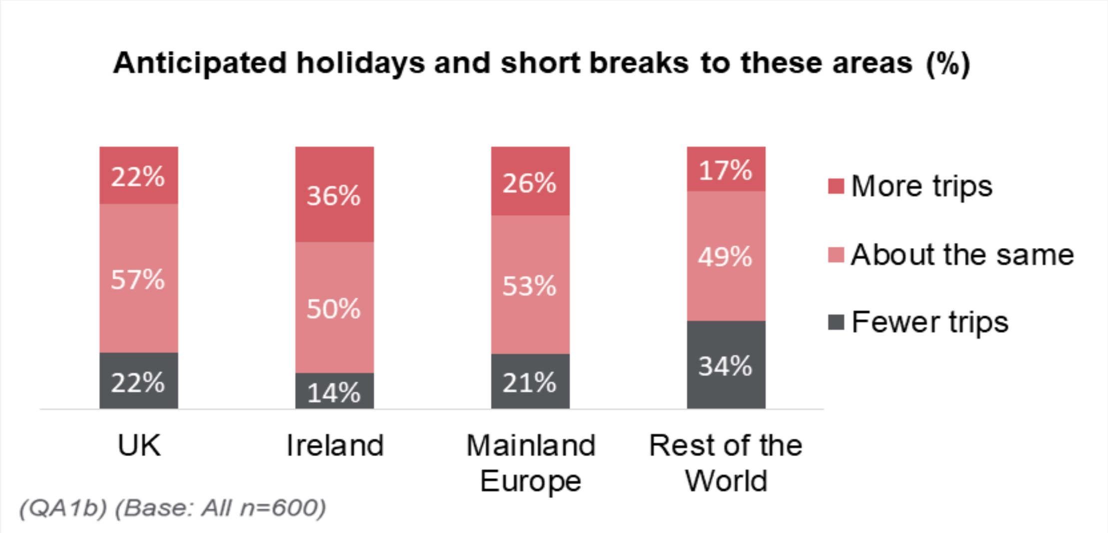


(QA1a) (Base: All n=600)

Intention to visit the UK

3.4 The majority of the Irish market expect 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. Just over one in five (22%) stated they anticipated taking more trips to the UK in the following 12 months, the exact same proportion that stated they anticipated taking fewer. A higher proportion of the Irish market intend to take more domestic holidays in Ireland or holidays to mainland Europe in 2020. Trips to the rest of the world were predicted as declining however

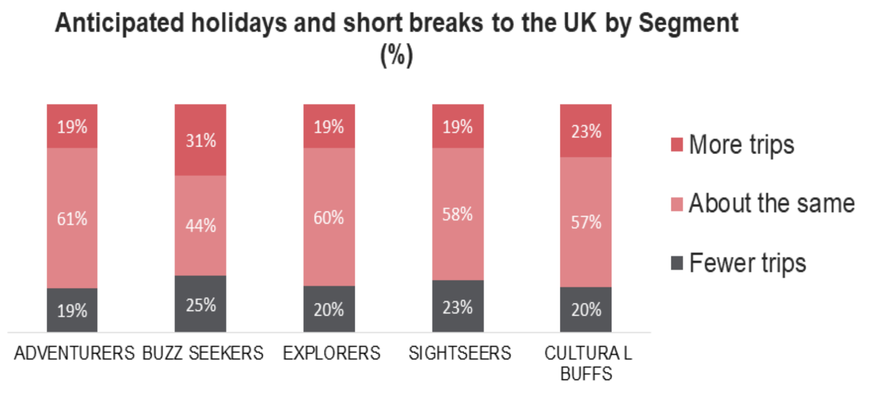
Figure 2.



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 target segments, Buzz Seekers are the most likely to take more trips to the UK in the next 12 months (31% compared to 22% on average). The other segments are much closer to the average so are equally likely to opt for more trips to the UK in the next 12 months.

Figure 3

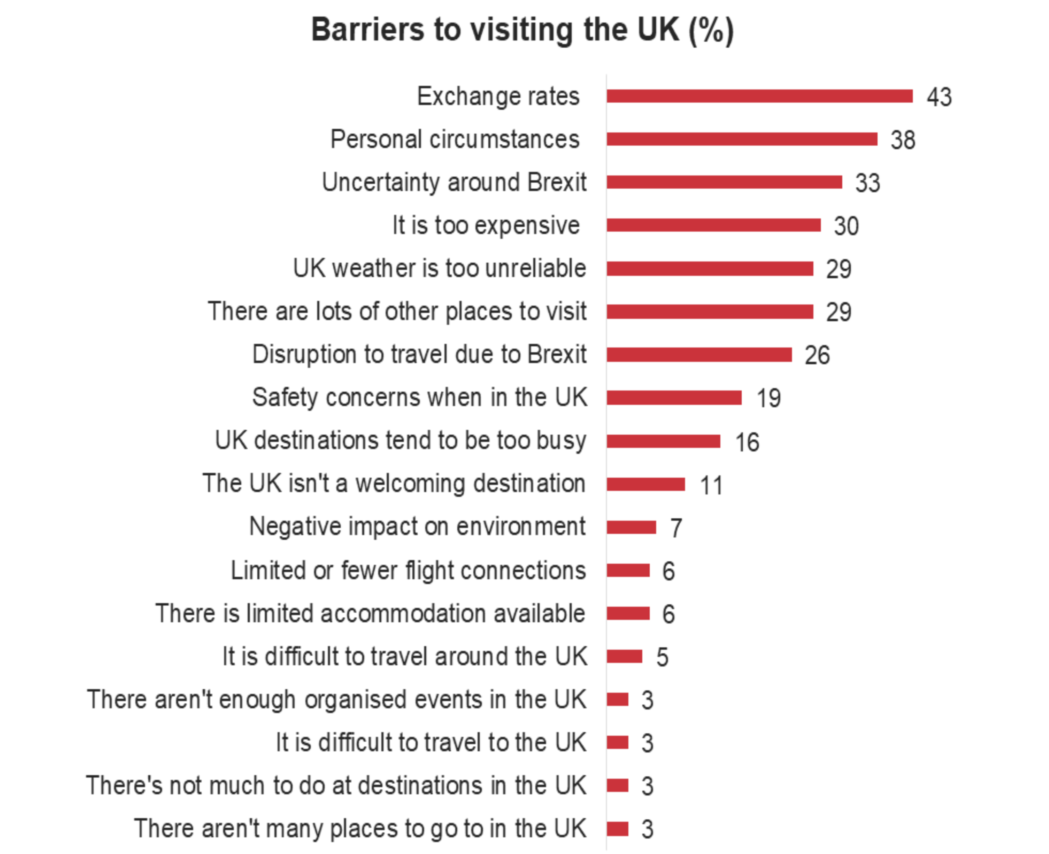


(QA1b) (Base: All n=600)

3.7 With specific reference to holidays in the UK, ‘exchanges rates’ were cited as the main barrier to visiting amongst the Irish market (43% stating this), followed by ‘personal circumstances’ (38%) and ‘uncertainty around Brexit’ (33%). ‘Disruption to travel as a result of Brexit’ was also a dominant reason, 26% stating this.

3.8 Brexit-specific reasons are regarded as a barrier for 44% of the Irish market. The expense of a holiday to the UK and unreliability of weather are also concerns.

Figure 4



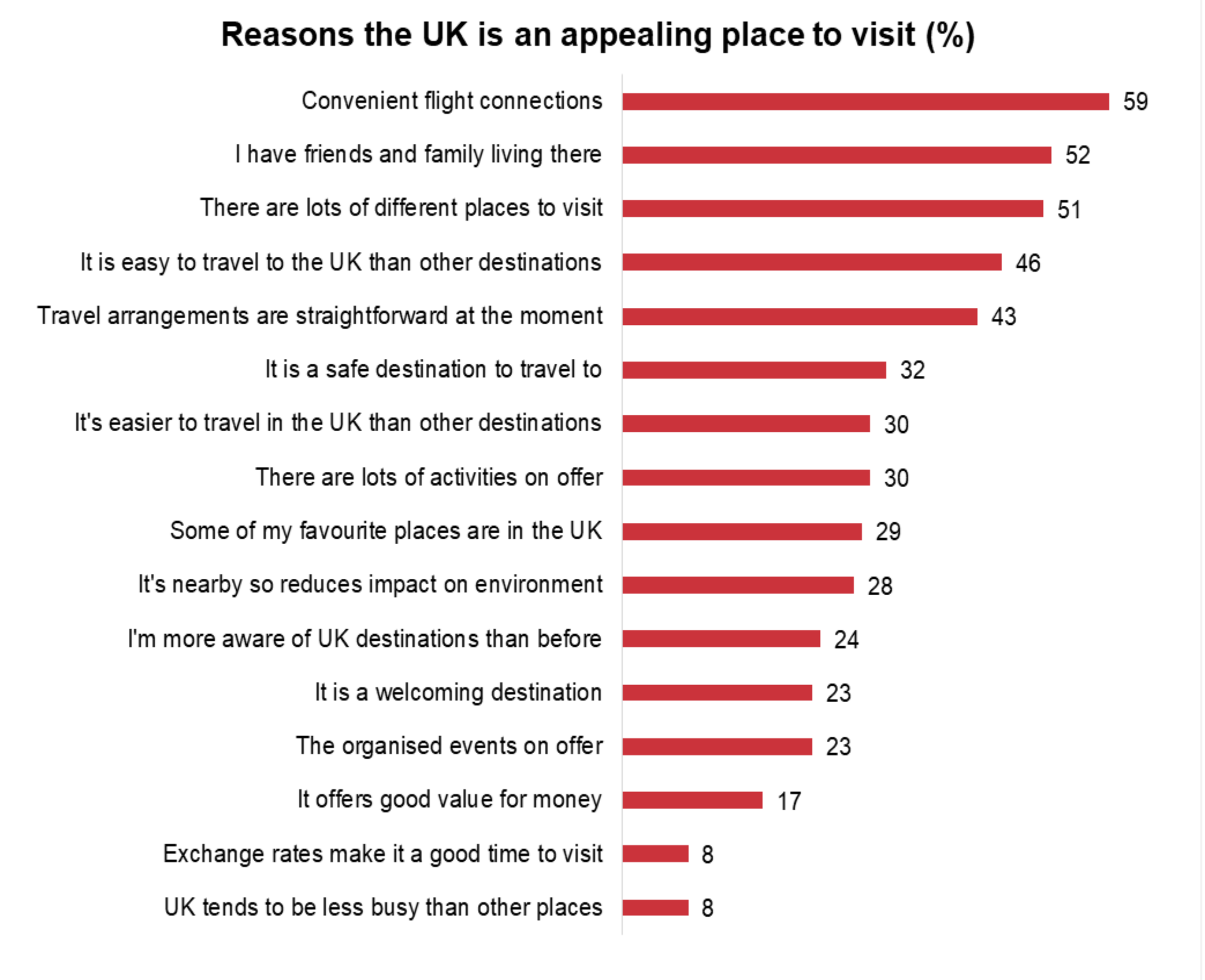
(QA2a) (Base: All n=600)

Reasons the UK is an appealing place to visit

3.9 Factors relating to 'convenience' and 'familiarity' dominate the top 10 reasons why the UK is regarded as an appealing place to visit for the Irish market. Flight connections (59%), family/friends living there (52%), ease of travel to the UK (46%) and ease of travel in the UK (30%) are all mentioned, at least one of these was a response for 90% of the Irish market. Destination appeal is also a strong influence though – 51% state that 'there are lots of different places to visit' and 30% that 'there are lots of activities on offer'. Notably, the Irish market came up with more reasons the UK is appealing than barriers to visiting.

3.10 There are some differences across visitor segments. Explorers are most likely to find the UK appealing to visit because they have friends and family there, whilst sightseers are more likely to be drawn by the ease of making travel arrangements. Buzzseekers meanwhile are least interested in there being 'lots of different places to visit' and are most interested of all the segments in the destination having 'lots of activities on offer'. This suggests an opportunity to promote Wales as an activity rich destination to this segment.

Figure 5



(QA2b) (Base: All n=600)

Types of holiday destinations being considered in the UK

3.11 The Irish 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 – 'cities and large towns' the most appealing (73% stating this), followed by 'historic and heritage towns' (63%). The appeal of urban destinations is notably higher than the UK domestic market. Notably, Wales is the country least likely to be associated with each of these types of destinations.

3.12 'Scenic countryside and villages' are the next most appealing (54%), followed by 'scenic coastline and harbours' (50%). A third (33%) are also interested in a 'touring holiday', something that particularly appeals to adventurers (36%) and explorers (35%). There is notably lower level of interest in traditional seaside destinations amongst the Irish market.

3.13 A significant minority show an interest in wilderness or nature (26%). Notably, only Scotland is more likely than Wales to be seen as a place with this type of destination. Of those that saw the current Visit Wales television advertising, associations with Wales in this area were significantly higher than amongst those that didn't.

Figure 6: Types of Holiday destination considered for UK trip (%)

(QB1) (Base: All n=600)

3.14 Amongst segments, adventurers show an interest in relatively wide range of destination types, suggesting they enjoy variety and are open to trying the different things that the UK has to offer. Explorers, in contrast, are less likely to consider cities and large towns. Sightseers, Buzz Seekers and Cultural Buffs meanwhile are much more drawn to cities and large towns than any other destination types.

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

(QB1) (Base: Adventurers n=124; Buzzseekers n=114; Explorers n=149; Sightseers n=122; Cultural buffs n=91)

	Adventurer	Buzseeker	Explorer	Sightseer	Culture Buff
Cities and large towns	64%	82%	66%	85%	73%
Historic and heritage towns	68%	56%	68%	61%	59%
Scenic countryside and villages	65%	46%	56%	52%	48%
Scenic coastline and harbours	57%	43%	52%	47%	52%
A touring holiday	36%	34%	35%	29%	26%
Mountain adventure	40%	41%	27%	11%	24%
Traditional seaside resorts	24%	31%	28%	25%	34%
Holiday village/centre	26%	39%	19%	25%	35%
Wilderness and nature	33%	27%	30%	13%	24%
Large resort hotel	20%	34%	11%	24%	26%

Types of experiences being considered in the UK

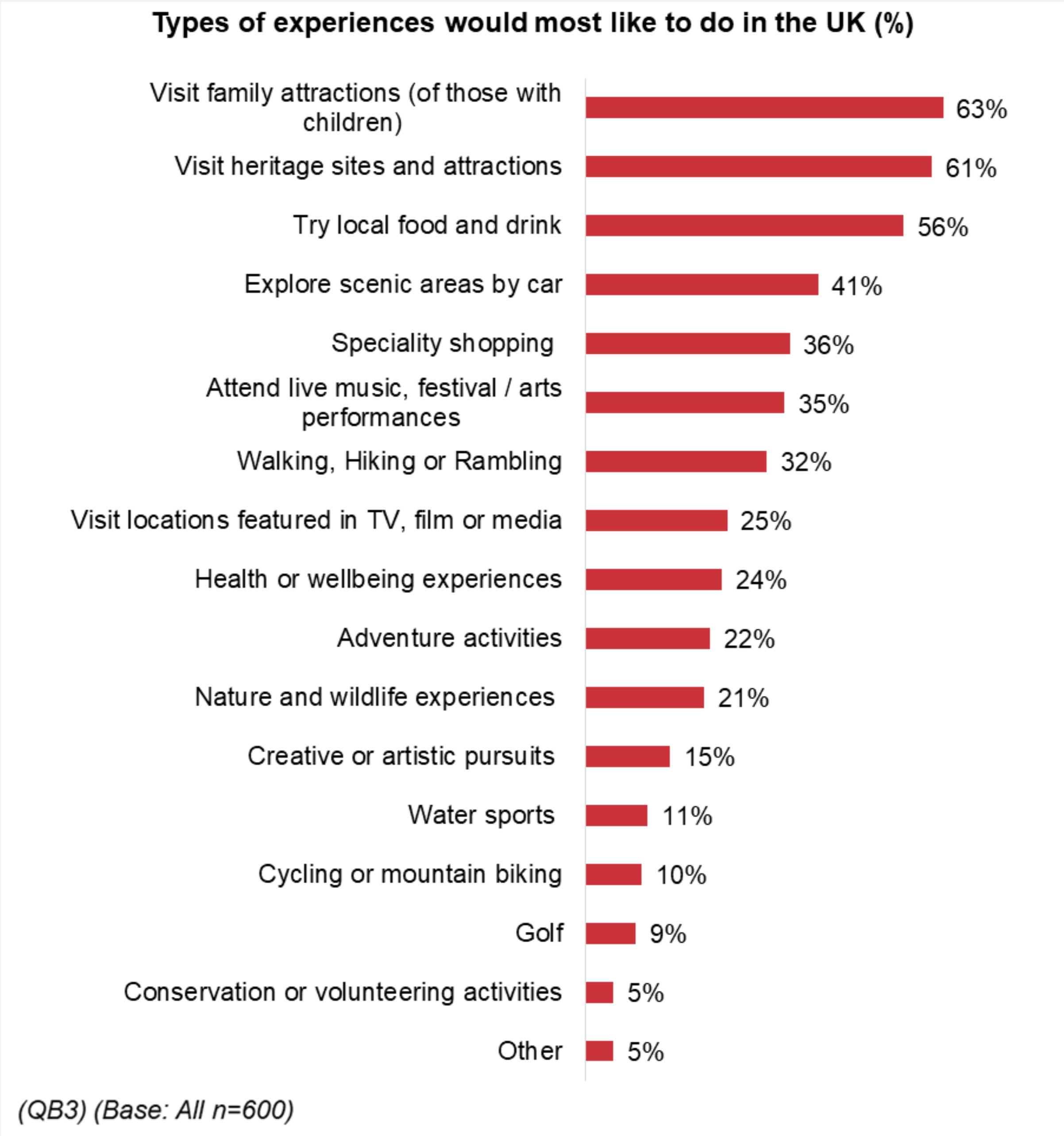
3.15 The Irish market consider a range of experiences on a holiday or short break in the UK, the most popular being 'visiting family attractions' (63%), 'visiting heritage sites and attractions' (61%) and 'trying local food and drink' (56%).

3.16 Walking is the most popular activity (32%) while some of the lowest interest is in watersports (11%) cycling (10%) and golf (9%).

3.17 Although not high individually, activities that specifically mention exercise (walking hiking or rambling, cycling, water sports, golf and adventure activities) are of interest for 56% of the market.

3.18 With over 40% interested in exploring scenic areas by car and a third interested in a touring holiday, there may be a good opportunity to promote the Wales Way Routes to this audience.

Figure 8



Influences on holidays

3.19 Linked to their favoured destination types and experiences, 'famous landmarks and attractions' (53%) and 'a destination rich in history and heritage' (45%) are the most influential factors when visitors from Ireland are choosing holidays or short breaks in the UK (67% choosing at least one of these two reasons). 'Somewhere you can visit at all times of the year' (44%), 'incredible scenery and landscapes' (43%) and 'lots of activities and things to do' (43%) are also influential.

3.20 Value for money is important and given the prominence of 'exchange rates' as a barrier to visiting, and 'personal finances' as a driver of holiday choice, the value of trips to Wales is a key point to promote. This is particularly pertinent given the desire for quality accommodation and food and drink. Value for money is more important to the Irish market compared to the German market (29%).

3.21 Visitors from Ireland value a place with rich history and heritage more than German visitors, who rank incredible scenery and landscapes more highly.

Figure 9

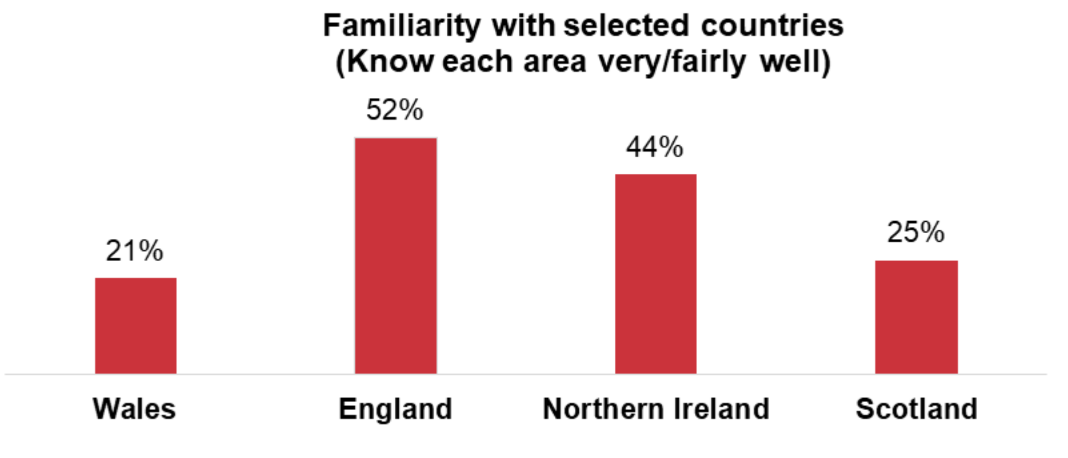
(QB2) (Base: All n=600)

4. Consideration of Wales

Familiarity and relationship with selected countries

4.1 The Irish market are less familiar with Wales than they are with any of the other countries within the UK, 21% stating they know Wales very/fairly well. Familiarity is highest with England (52%) and Northern Ireland (44%).

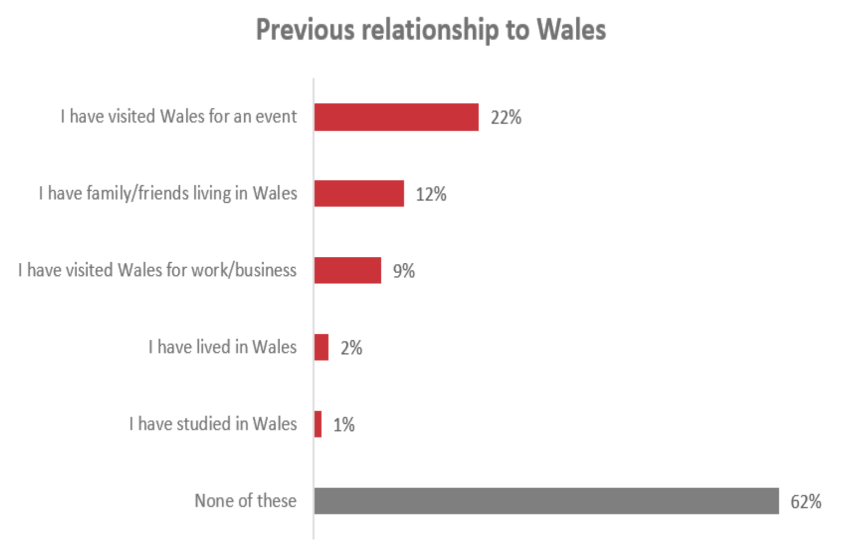
Figure 10



(QC1c) (Base: All n=600)

4.2 The substantial proportion of the Irish market have a prior relationship with Wales, with 28% having visited Wales previously and over one in ten having family or friends living in Wales. This suggests that an opportunity to capitalise on these relationships as well as links through study, events and work channels to encourage greater number of holiday visits in the future.

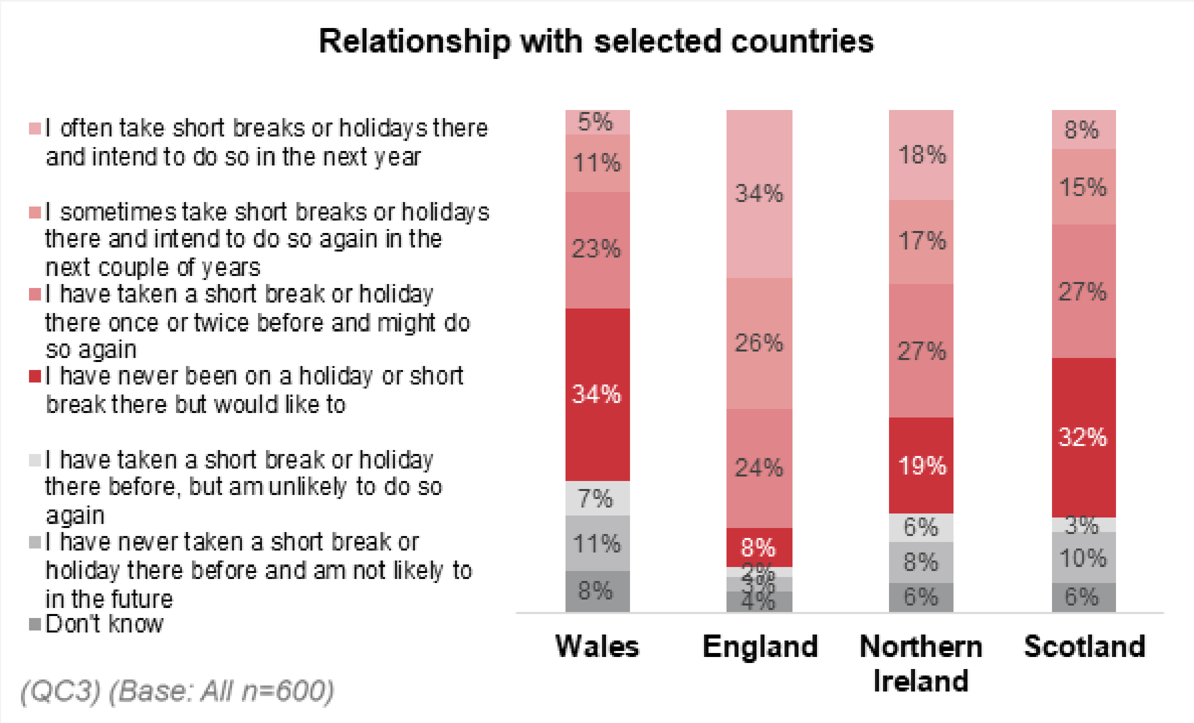
Figure 11



(QX9) (Base: All respondents: 600)

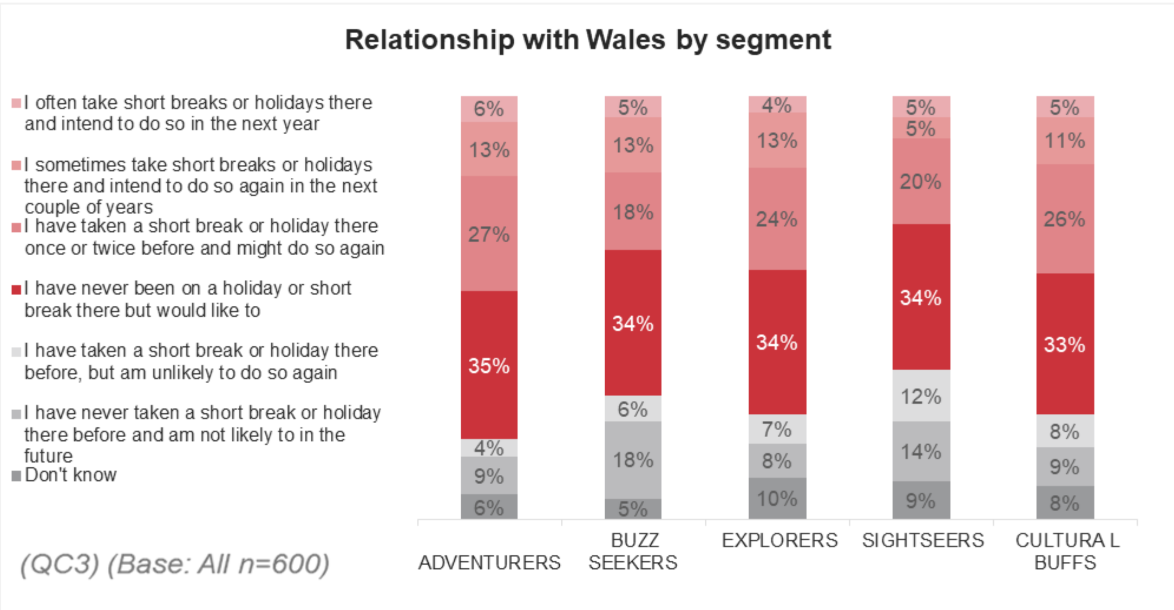
4.3 Familiarity generally correlates with visits, the Irish market are less likely to have visited Wales than any other country in the UK, although previous visitation is only slightly lower than to Scotland. Around 16% are more frequent visitors to Wales compared to 23% for Scotland. Positively, three quarters of the Irish market (73%) are open to visiting Wales in the future – around a third (34%) have never been but would like to, a potential source of new visitors.

Figure 12



4.4 When looking across segments, adventurers are the Irish segment most likely to be frequent visitors and open to visiting Wales in future (80% being open to this), followed by explorers (75%) and cultural buffs (75%). Sightseers are the segment least open to visiting wales, with 26% stating they are unlikely to visit in the future.

Figure 13

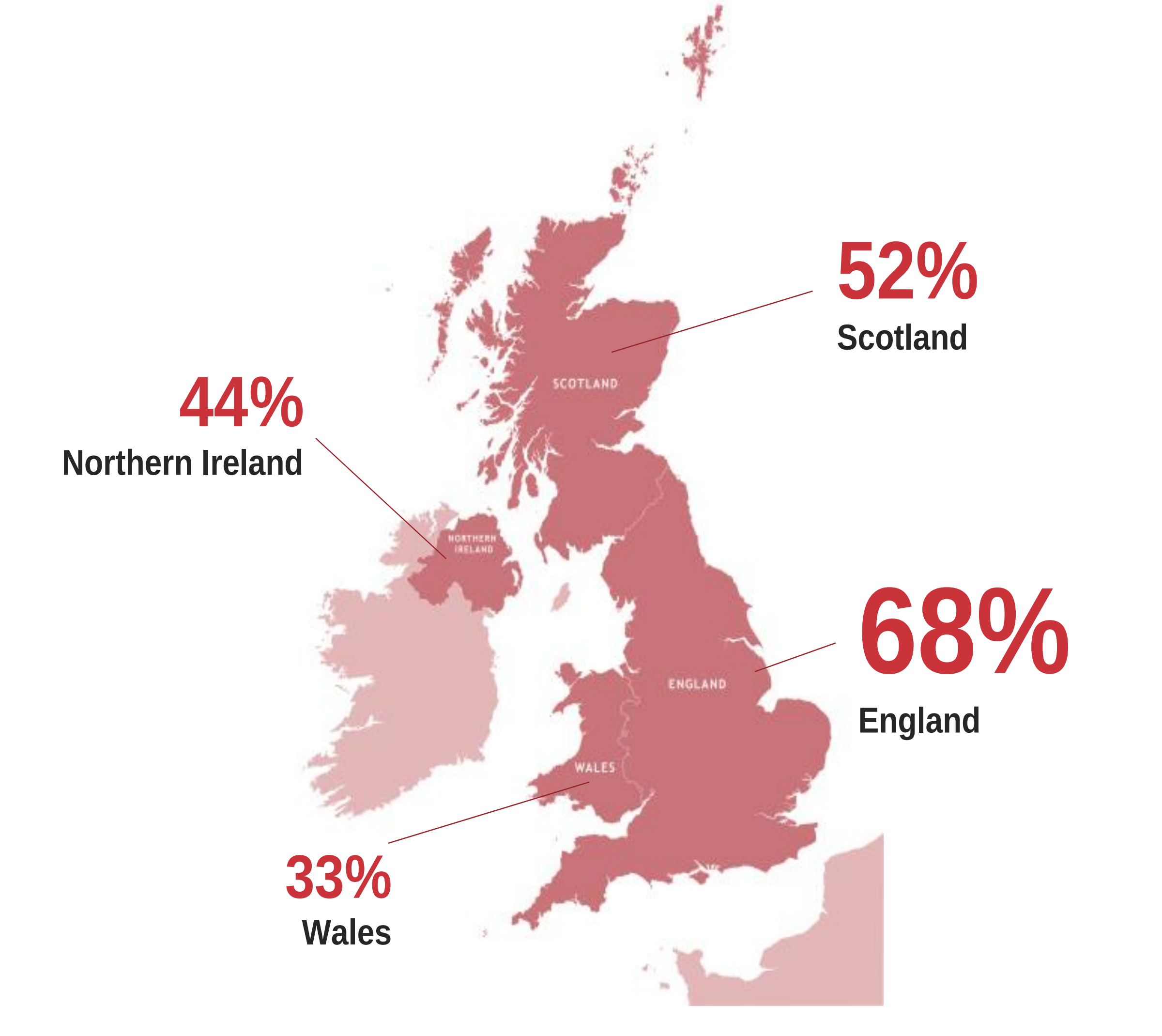


Consideration of UK destinations for a holiday or short break

4.5 While three quarters (73%) of the Irish market are open to visiting Wales in the future, previous visitors are most likely to be seriously considering a visit to Wales.

4.6 However, it's worth noting that despite similar levels of prior visitation, the Irish market are significantly more likely to be seriously considering visiting Scotland in the next 12 months. This indicates that familiarity is not the only driver for consideration – other factors can also play a role.

Figure 14: Proportion seriously considering visiting each country (QC5a) (%) (Base: All =600)

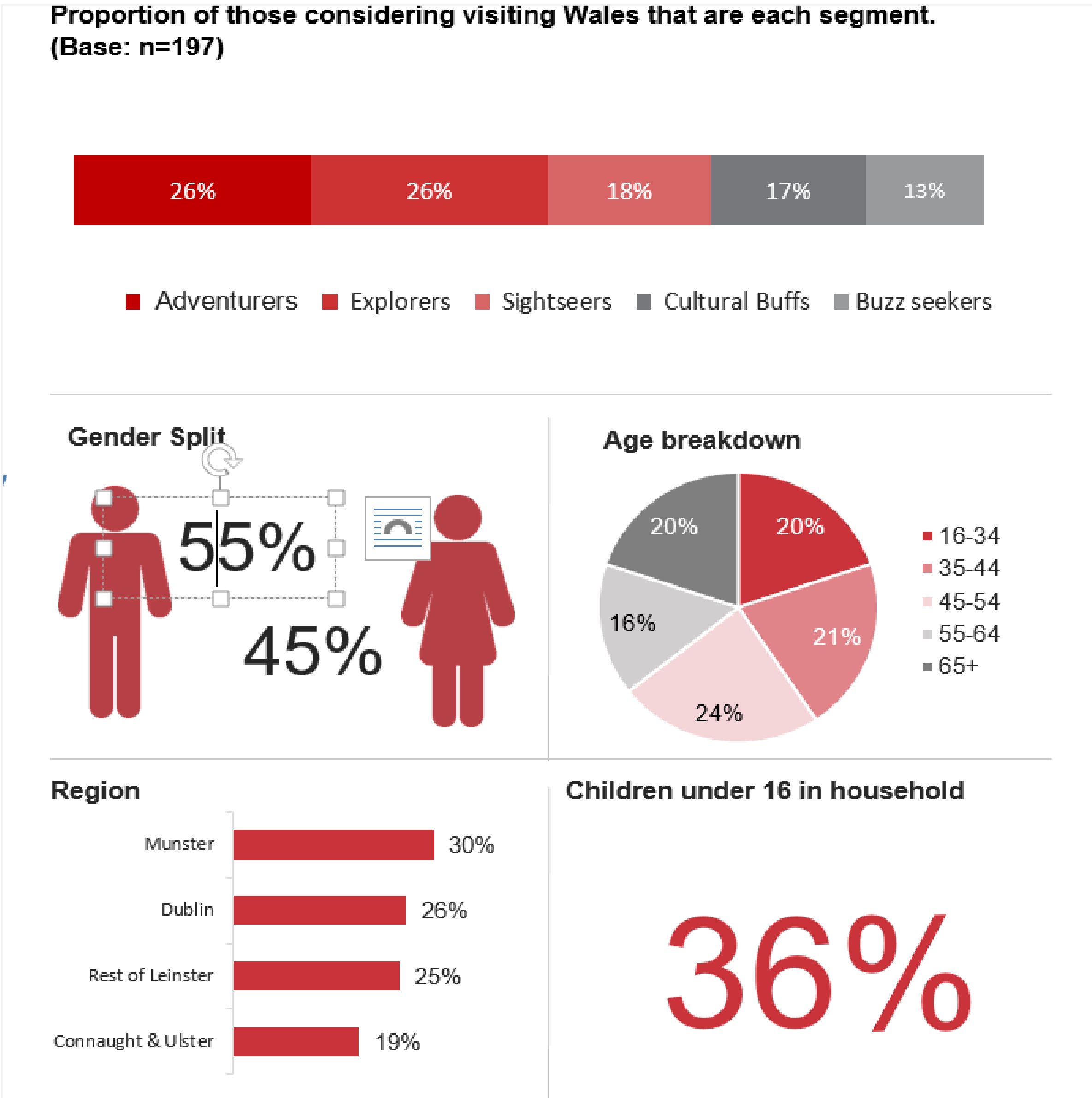


Profile of those considering Wales for a short break or holiday

4.7 Over half of those considering a trip to Wales are either adventurers (26%) or explorers (also 26%). Although cultural buffs are the second most likely to consider Wales as a holiday or short break destination, their relative low numbers in the Irish market means that they are the second smallest segment within the 'Wales considerers' audience. Buzz seekers who are the segment most likly to be planning more holidays in the UK in 2020, make up a low proportion of those considering visiting Wales indicating a lower level of interest from this key group.

4.8 Wales considerers are majority male (55%), and belong to an even range of age groups. Over a third have children in their household, and around a third (30%) come from Munster.

Figure 15



Profile of considerers for each country

4.9 For the Ireland market, when compared to consideration of the entire UK, Wales considerers are more likely to be:

- Adventurers (26% compared to 21% in the market)
- Male (55% compared to 50%)
- Older, aged 55+ (36% compared to 31%) or 45-54
- From Munster (30% compared to 25%)

4.10 Wales considerers are less likely than the overall market for the UK to be:

- Buzz seekers (13% compared to 19% in the market)
- Female (45% compared to 50%)
- Aged 16-34 (20% compared to 29%)
- From Connaught and Ulster (19% compared to 25%)

4.11 Notably, all of the other parts of the UK index higher than Wales on considerers that are buzz seekers and 16-34 year olds.

Figure 16		**All UK considerer**	**Wales considerer**	**England consider**	**N Ireland consider**	**Scotland considerer**
Segment	Adventurers	21%	26%	18%	27%	23%
	Buzzseeker	19%	13%	19%	20%	16%
	Explorers	25%	26%	25%	26%	25%
	Sightseers	20%	18%	22%	14%	20%
	Cultural Buffs	15%	17%	15%	15%	17%
Gender	Male	50%	55%	53%	51%	49%
	Female	50%	45%	47%	49%	51%
Age	16-34	29%	20%	27%	26%	28%
	35-44	22%	21%	21%	22%	23%
	45-54	18%	24%	19%	22%	21%
	55-64	14%	16%	16%	15%	12%
	65+	17%	20%	17%	15%	17%
Children at home	Children	34%	36%	34%	34%	33%
	No children	66%	64%	66%	66%	67%
Region	Munster	27%	30%	29%	28%	28%
	Rest Leinster	27%	**25%**	26%	24%	27%
	Connaught & Ulster	18%	**19%**	18%	19%	17%
	Dublin	28%	**26%**	27%	29%	28%

Reasons for not considering Wales

4.12 There were no overwhelming leading reasons for people not considering Wales. Lack of awareness of what there is to do is the most commonly mentioned reason for not visiting (35% stating this), as is a sense that 'other places in the UK are more appealing' (32%).

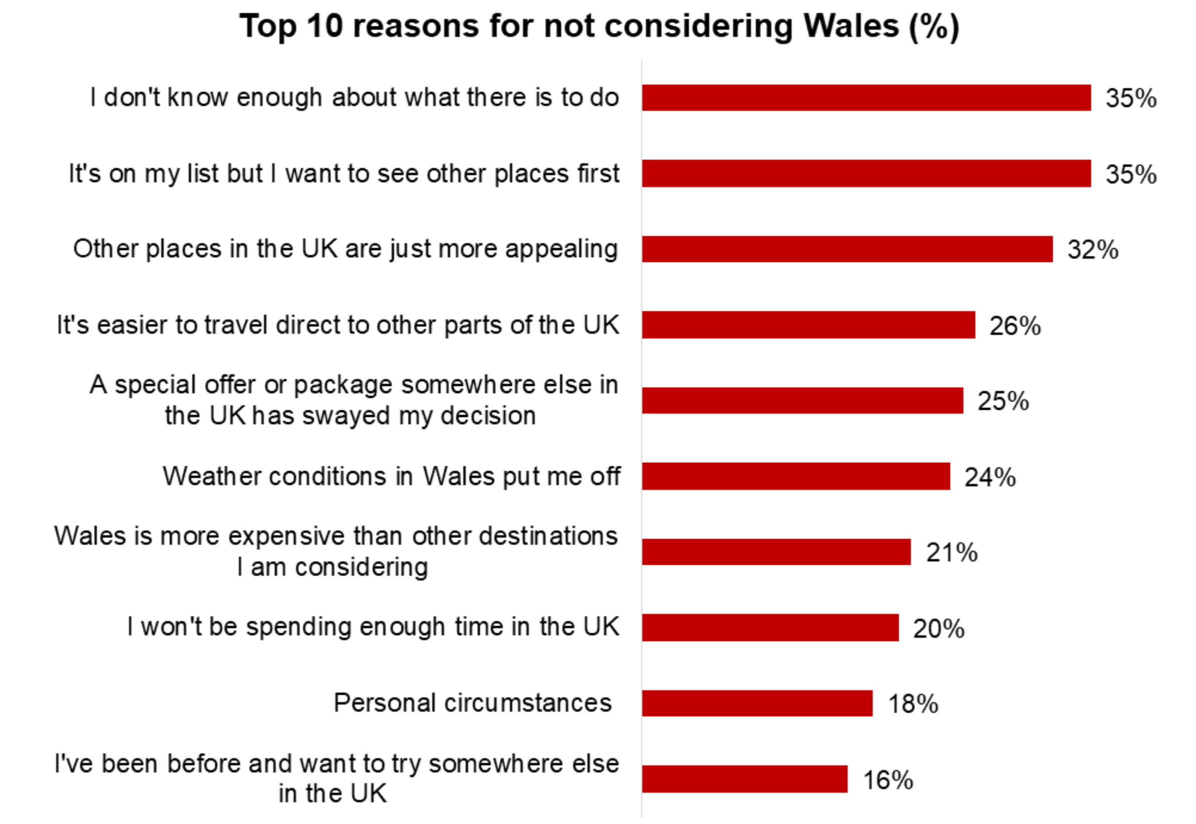
4.13 Positively, for around a third (35%) of the Irish market, Wales is on the list but they are seeing other places first. By increasing awareness of what Wales has to offer, it is possible that Wales will move up the list of places to visit.

4.14 Other factors include inadequate travel links compared to other parts of the UK (26%), a special offer or package offered elsewhere (25%) and weather conditions in Wales (24%).

4.15 Awareness of what there is to do in Wales is lowest amongst Buzz Seekers. This segment are also the most likely to have been swayed by a special offer or package somewhere else in the UK.

4.16 Factors that were less important to the Irish holiday / short break travellers not choosing Wales were that it's too busy / over-crowded (only 2%), too far to travel (only 4%) or that there is no suitable accommodation available (only 5%).

Figure 17



(G15) (Base: All not considering Wales n=403)

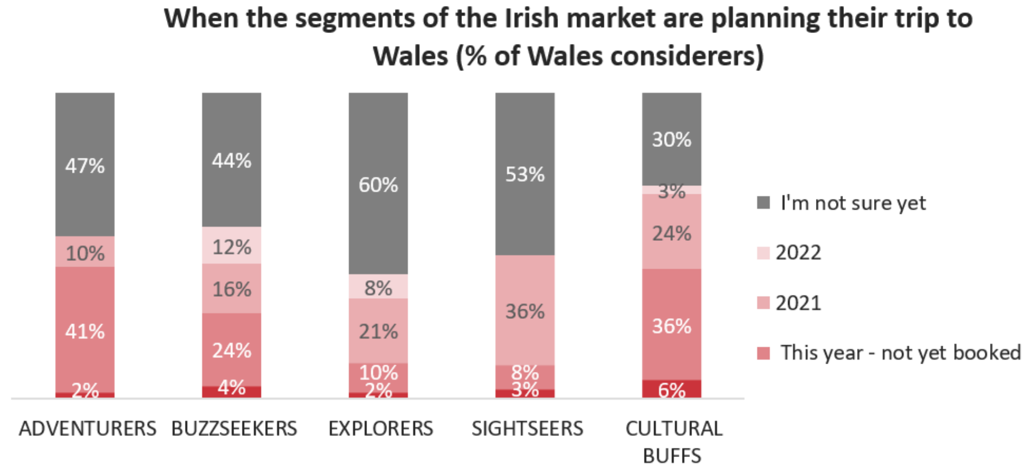
5. Characteristics of planned trips to Wales

Timing of anticipated trip to Wales

5.1 Of those within the Irish market seriously considering visiting Wales in the next 12 months, only 3% had already booked a trip for 2020. 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. This highlights the need for Visit Wales to ensure Wales remains front of mind amongst the Irish market to help convert those yet to have definitely decided to visit. The impact of the Covid19 outbreak on the ability and desire of the Irish market to take a holiday in the UK will be a key influence.

5.2 Across the segments, explorers (60% vs an average 48%) and sightseers (53% vs an average 48%) are least sure about when they will plan their trip to Wales. Cultural Buffs on the other hand, are the most likely to have already booked (6% vs an average 3%) and adventurers are most likely to be planning to go this year but have not yet booked (41% vs an average 24%), suggesting an opportunity to target both Cultural Buffs and adventurers in particular with special offers for this year to encourage them to commit.

Figure 18



(QG1) (Base: Adventurers n=51; Buzzseekers n=25; Explorers n=52; Sightseers n=36; Cultural buffs n=33)*

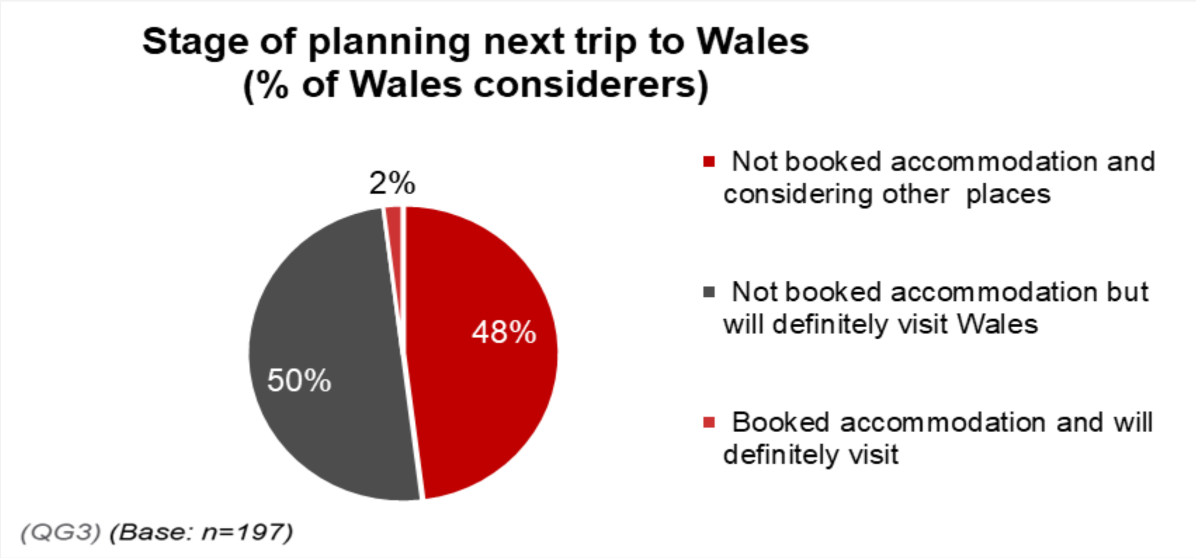
**caution base size low*

Stage of planning next trip to Wales

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

5.4 Amongst the I segments, explorers and sightseers are more likely to still be at the 'not booked and considering other places' stage. Adventurers, buzzseekers and cultural buffs are more likely to have not booked accommodation but will definitely visit Wales.

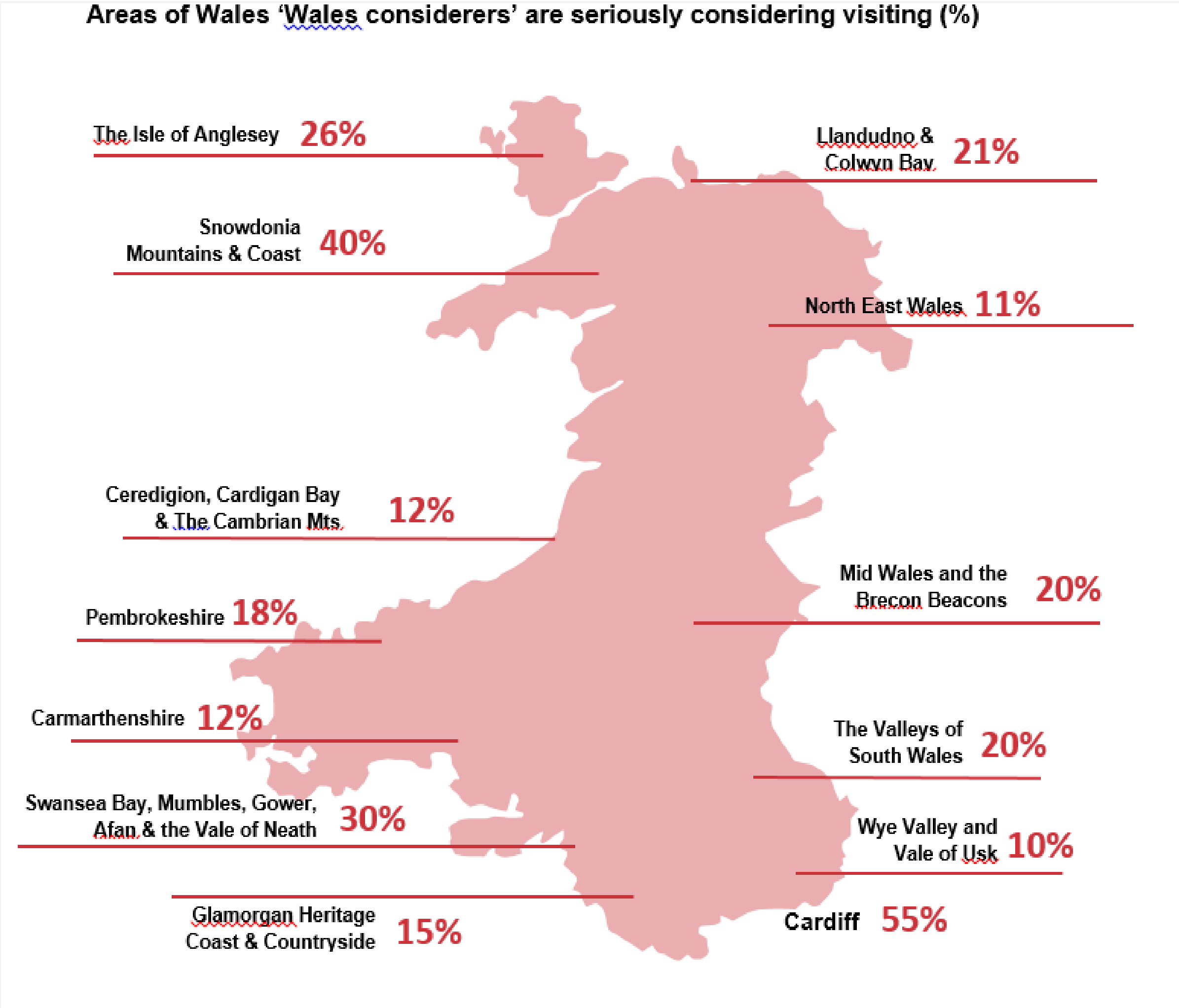
Figure 19



Where intending to visit in Wales

5.5 Visitors from the Irish market are likely to be planning to split their time in Wales between the North and the South of the country. Although over half (55%) intend to visit North Wales, Cardiff is the individual destination they are most likely to visit, 55% stating they would do so, followed by Snowdonia (40%). Swansea Bay, Mumbles, Gower, Afan & The Vale of Neath (30%) and Anglesey (26%) were the next most popular. Anglesey and Pembrokeshire are perhaps lower than expected given their direct travel links with Ireland.

Figure 20

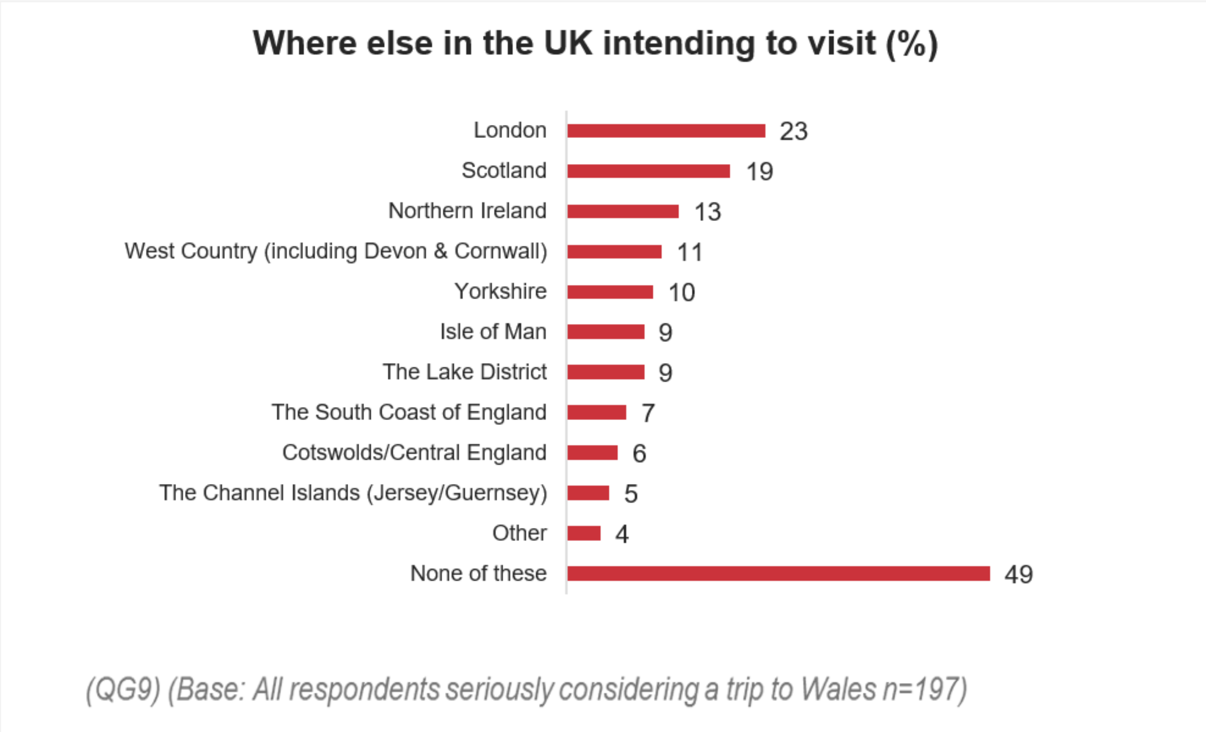


(QG8) (Base: n=197)

Where else visiting in UK

5.6 On average those considering visiting Wales would visit 2 destinations on their trip, although only half (51%) would visit somewhere other than Wales. London (23%) and Scotland (19%) are the most popular areas to add on for those seriously considering a trip to Wales.

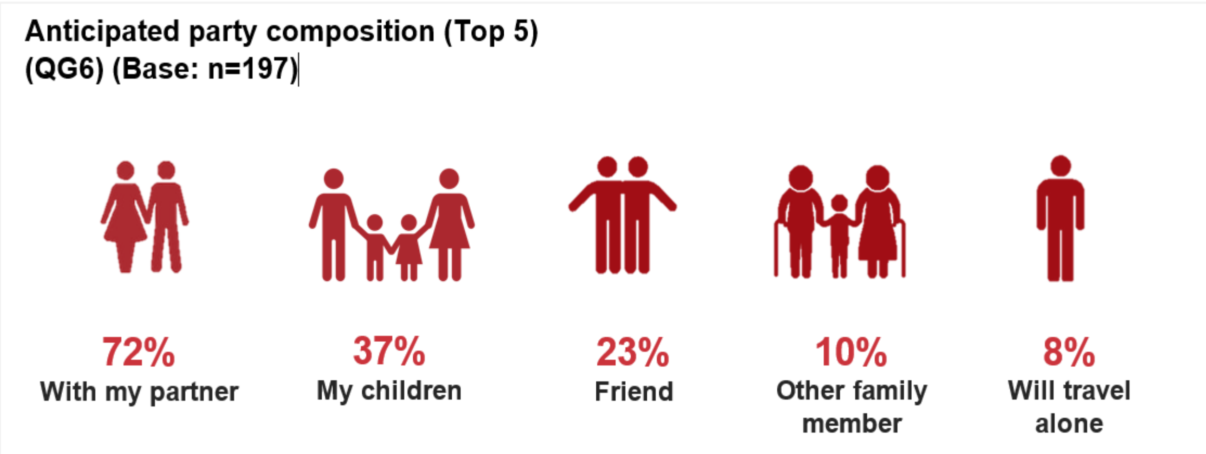
Figure 21



Anticipated party composition for next trip to Wales

5.7 Wales considerers from Ireland are most likely to visit with their partner (72%). Around half as many are likely to visit with their children (37%), and nearly 1 in 4 (23%) are likely to visit with their friend/s. A small minority intend to travel alone.

Figure 22



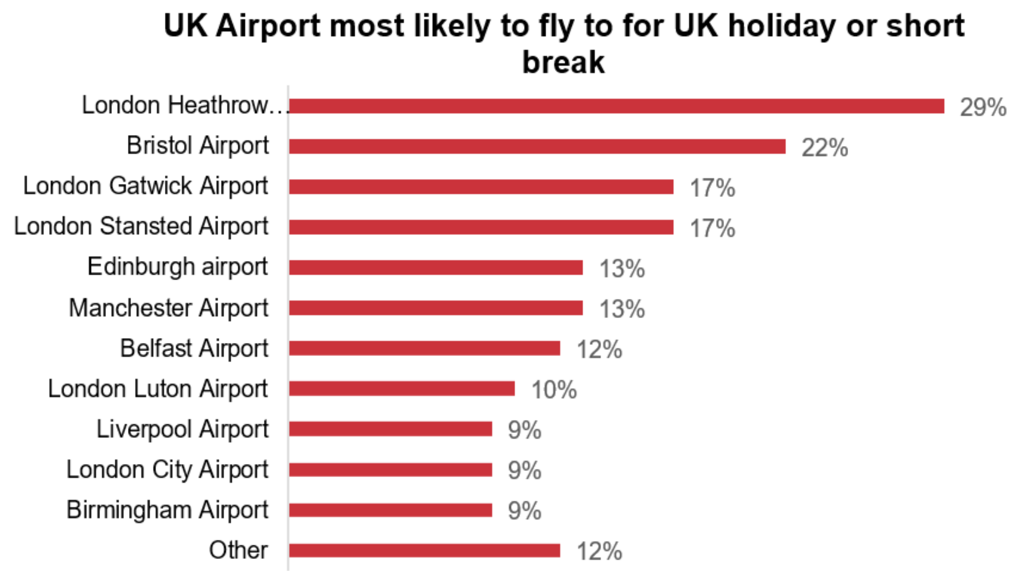
Anticipated mode of travel to Wales

5.8 The Irish market are most likely to travel to Wales by sea using their own car (48% stating this), followed by air, via a direct flight to Wales (31%). 16% would travel by air to another UK airport with London and Bristol airports most popular.

Figure 23: Anticipated mode of travel to Wales
(QG10) (Base: n=197)

5.9 Travellers from Ireland are much more likely to fly to Bristol airport (22%) than travellers from the German market (8%). This suggests that there may be opportunity to attract more travellers from Ireland to travel by air direct to Cardiff.

Figure 24



(QG11) (Base: All Irish respondents likely to travel to the UK by air n=92)

Length of anticipated trip to Wales

5.10 Of those within the Irish market considering a trip to Wales, the majority (61%) plan on taking a trip of 4+ nights. On average Wales considerers anticipate taking an average length trip of 5 nights in Wales. Around four in ten plan to visit Wales for a short break, much higher than the proportion of travellers from Germany and other international markets.

Figure 25

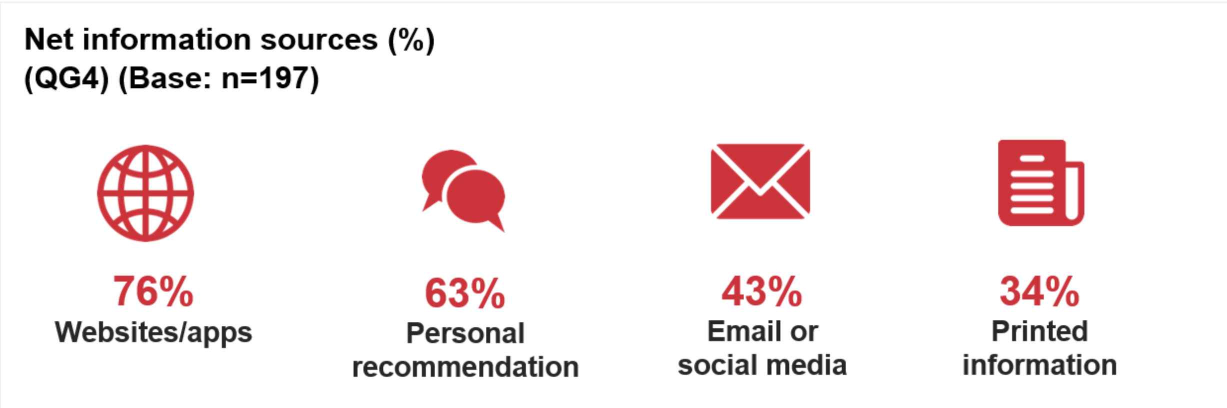
Planned length of trip to Wales amongst 'Wales considerers' (QG2) (Base: n=197)

39%	61%	5 nights
Plan on taking a short break to Wales (1-3 nights)	Plan on taking a holiday to Wales (4+ nights)	Average length of planned trip to Wales (nights)

Anticipated information sources to plan next trip to Wales

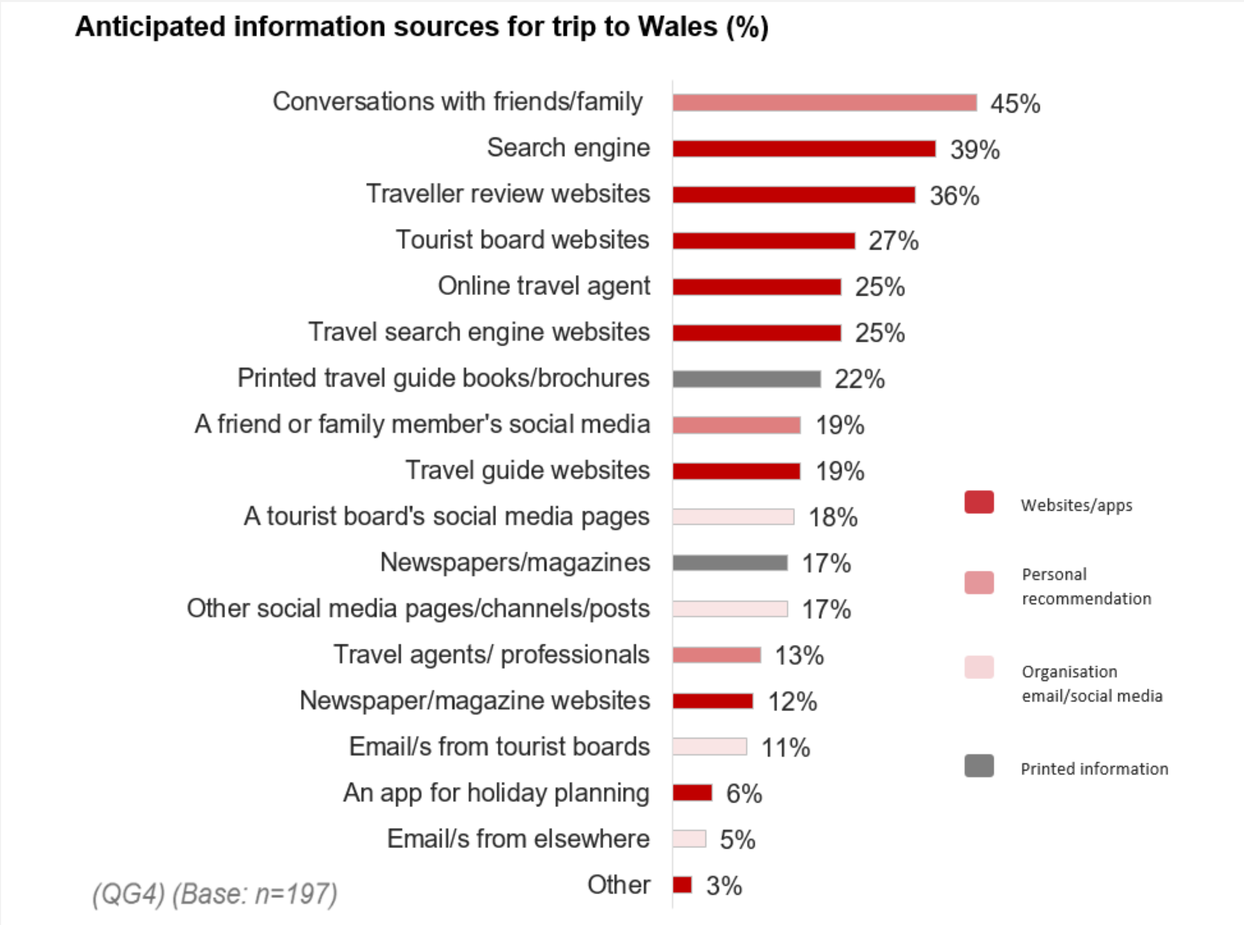
5.11 The Irish market anticipating a visit to Wales are most likely to plan through websites and apps, 76% stating this. Personal recommendation (63%) and email or social media (43%) are also important. Printed information remains an important influence for around a third (34%).

Figure 26



5.12 Conversations with friends and family who have visited is the single biggest anticipated information source for a trip to Wales, 45% stating this, followed by search engine (39%), traveller review sites (36%), tourist board websites (27%) and online travel agents (25%). Travel guide books/brochures are the most popular printed source of information (22%).

Figure 27

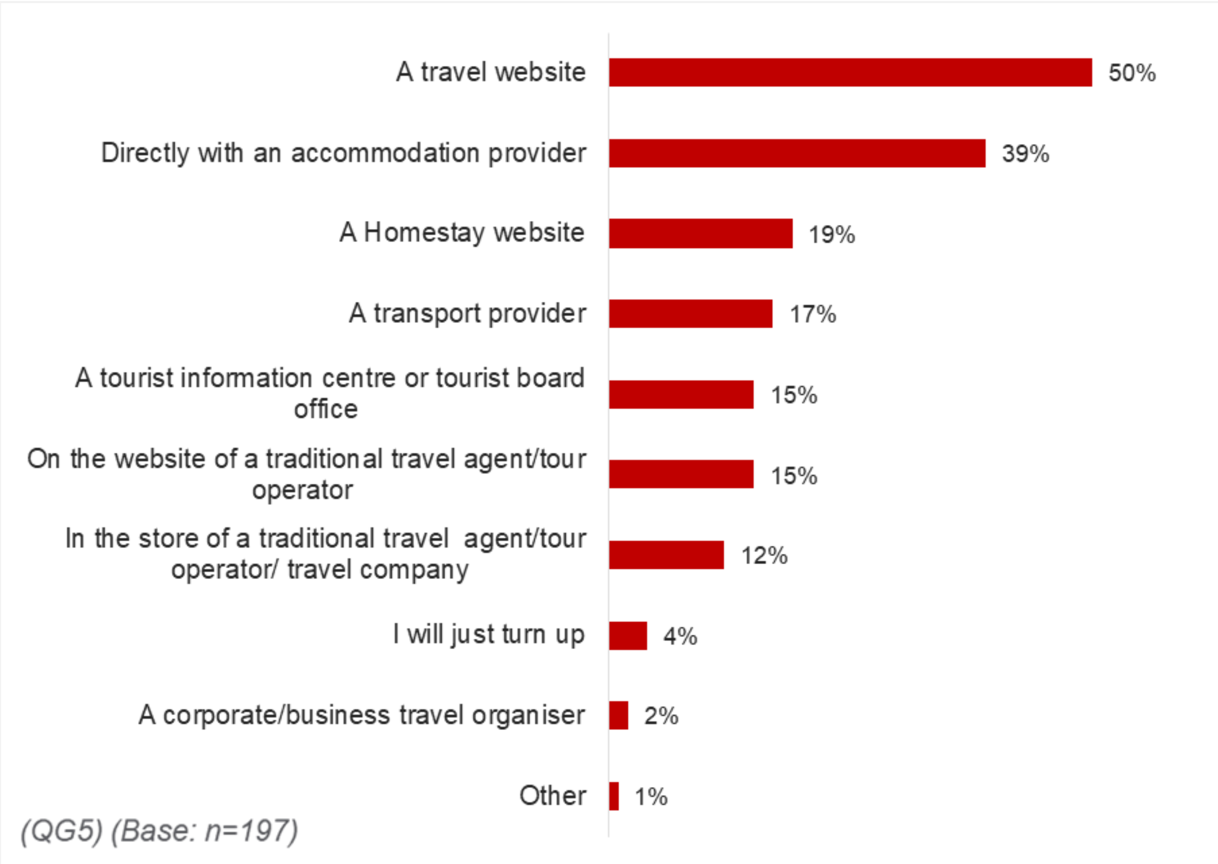


Anticipated booking channels for next trip to Wales

5.13 Travel websites are the channel Wales considerers are most likely to book accommodation with (50% stating this), followed by 'directly with an accommodation provider' (39%).

5.14 Amongst the segments, explorers are most likely to have visited the store of a traditional travel (23% vs an average 12%) or store of a traditional travel agent (21% vs an average 10%) while buzzseekers (72% vs an average 48%) and sightseers (61% vs an average 48%)) are more likely to have used a travel website.

Figure 28: Anticipated accommodation booking channels for trip to Wales (% listed)

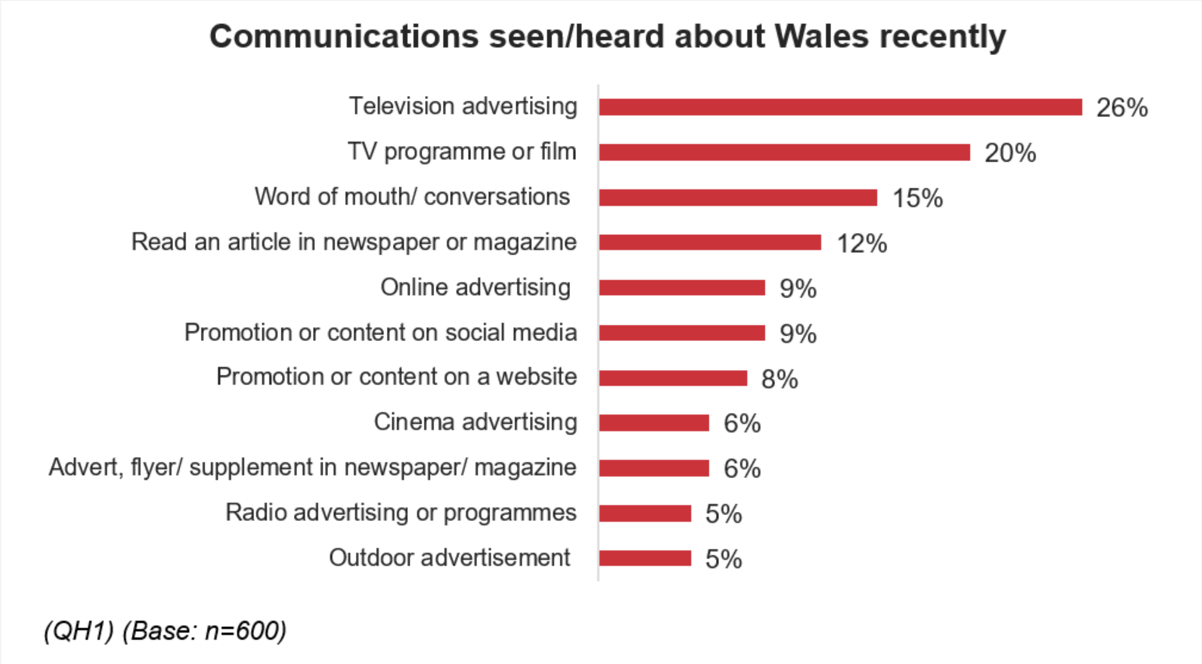


6. Contact with Visit Wales

Recent communication seen/heard about Wales recently

6.1 Unprompted, around 1 in 4 (26%) of the Irish market, surveyed in February 2020, recall seeing television advertising about Wales recently, 1 in 5 recall hearing about Wales in a TV programme or film. There was lower recall of hearing about Wales in articles in print (12%), online advertising (9%) and on social media (8%).

Figure 29

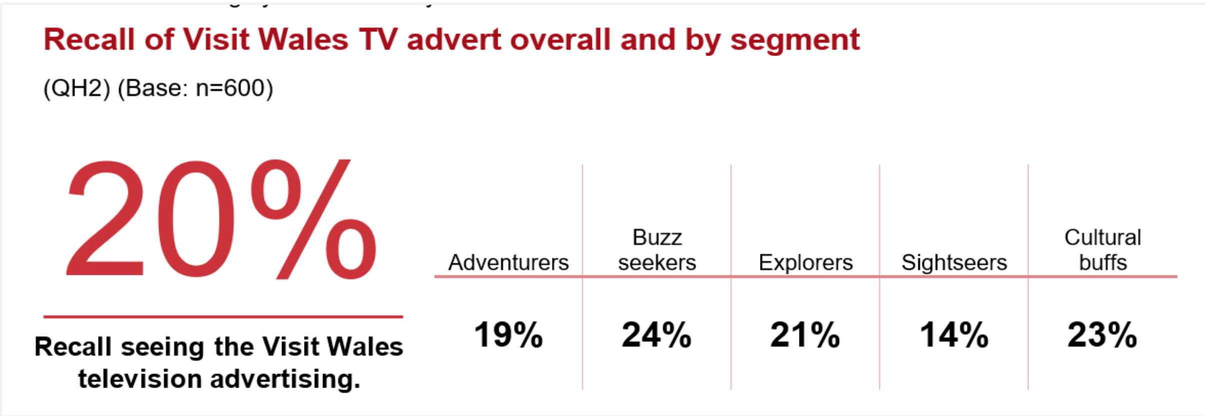


Recall of Visit Wales television advertising (prompted)

6.2 1 in 5 of the Irish market recall seeing the recent Visit Wales television advertising, when shown it. This is a similar level of recall as the UK market. Notably, the segment most likely to see the TV advert is 'buzz seekers', the segment least likely to be considering visit Wales for a holiday or short break. There are broadly similar recall levels across the other segments with the exception of sightseers who have notably lower recall.

6.3 It's worth noting that the research was conducted at the start of the television advertising cycle in February/March 2020.

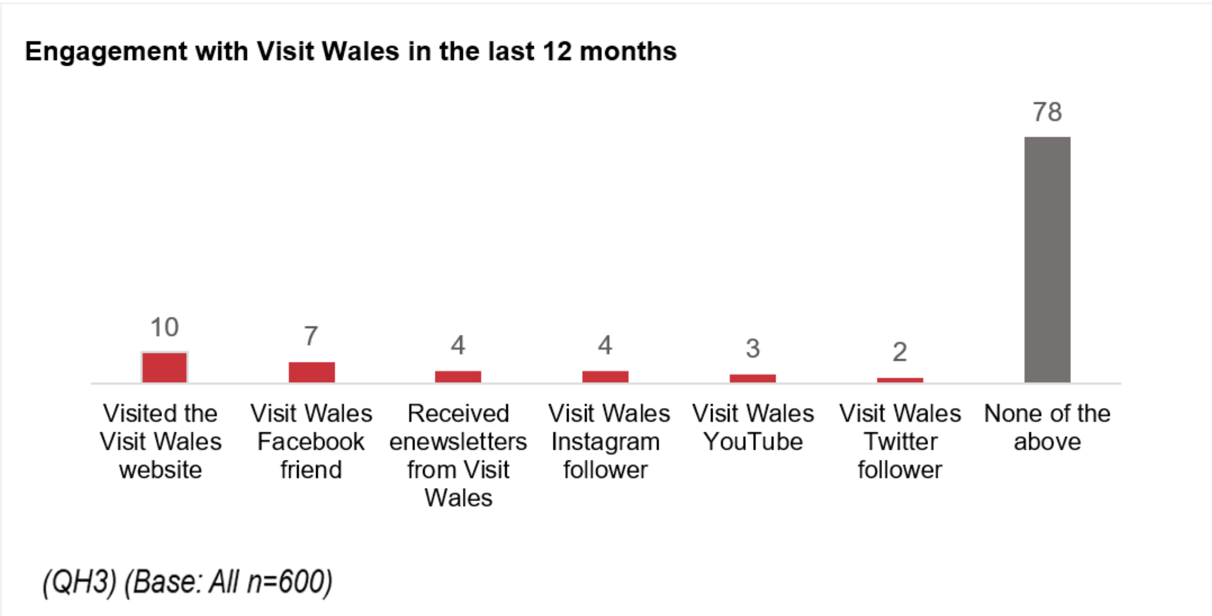
Figure 30



Engagement with Visit Wales communications in last 12 months

6.4 Nearly 1 in 4 (22%) of the Irish market have engaged with Visit Wales communication sources in some way in the last 12 months. 1 in 10 (10%) stated that they had visited the Visit Wales website in the previous 12 months and 1 in 13 (7%) were a Visit Wales Facebook friend. Small proportions had contact with Visit Wales across other channels. This is a similar level of engagement to the UK market

Figure 31



6.5 Amongst the segments, buzzseekers are the most likely to have been to the Visit Wales website or to have engaged with the social media channels. Cultural Buffs and Adventurers are the other segments most likely to have engaged with Visit Wales mainly via the website. 89% of explorers and 88% of sightseers have not had any contact with Visit Wales channels and are the least engaged segments.

Figure 32: Engagement with Visit Wales in the last 12 months amongst segments

(QH3) (Base: Adventurers n=124; Buzzseekers n=114; Explorers n=149; Sightseers n=122; Cultural buffs n=91)

	Adventurers	Buzzseekers	Explorers	Sightseers	Cultural Buffs
Visited the Visit Wales website	12%	13%	7%	6%	15%
Received e- newsletters from Visit Wales	5%	6%	1%	2%	10%
Follow Visit Wales on Twitter	3%	4%	1%	0%	2%
Friends with Visit Wales on Facebook	9%	13%	3%	2%	8%
Subscribe to the Visit Wales Channel on YouTube	1%	11%	2%	1%	1%
Follow Visit Wales on Instagram	3%	10%	2%	2%	2%
None of the above	75%	63%	89%	88%	73%

7. Key Findings & Implications

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

7.2 Notably, desire to take domestic trips within Ireland, or trips to Mainland Europe is set to increase in the next 12 months. This does suggest that – with the right conditions - there is potential to increase trips to the UK as well.

7.3 There are a number of perceived barriers to visiting the UK for a holiday or short break such as value for money and cost of exchange rates. Brexit is particularly strong – around 2 in 5 citing it. This highlights the importance of communicating certainty around travel to the UK when the end of the transition period is over.

7.4 The Irish market have a net positive impression of the UK – 'reasons for visiting' indexing higher than 'barriers to visiting' – a positive indicator for future visits.

7.5 The Irish market are most likely to be considering trips to the UK for a 'heritage' trip and 'city break' trip, two areas where Wales has the lowest associations of each country featured. Their importance suggests a need to strongly promote them within future Visit Wales communications. In particular, it highlights the potential to promote Cardiff and heritage towns to the Irish market.

7.6 Positively, there is widespread demand for scenic countryside and seaside holidays by the Irish market both of which are product strengths for Wales. Adventurers are the segment that these aspects appeal to most, suggesting an opportunity to target this segment for Wales.

7.7 A key issue in driving visits to Wales is familiarity with what the country has to offer. Notably, the Irish market is less familiar with Wales than it is with any other country within the UK. Familiarity with Wales correlates with relatively low visit consideration, and it is a reason directly given for not visiting. This validates the need to continue to promote Wales to the Irish market.

7.8 Raising the awareness of what there is to do in Wales should be combined with highlighting the ease of access to Wales, uncertainty in this area is also raised as a barrier to visits.

7.9 It's worth noting that familiarity isn't always a proxy for consideration to visit. Familiarity with Scotland is almost as low as Wales, but desire to visit is significantly higher. Scotland scores higher than Wales on almost all destination type associations – particularly those most important to the Irish market – highlighting the importance of a strong brand and diverse holiday offer. This further underlines the importance of strong Visit Wales marketing.

7.10 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 considering other places

7.11 A range of sources will need to be used to convert the Irish market to visitors – online sources, especially travel websites, are particularly important in planning, although print still has a role to play.

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 **20th February to 2nd 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 600 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 very/fairly likely to be taking a holiday or short break in paid-for accommodation in the UK in the next few years.

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.

Size of sample or sub-group on which survey result is based	10% or 90% ±	30% or 70%±	50%±
ALL RESPONDENTS (600)	2.4	3.7	4.0
WALES CONSIDERERS (197)	4.2	6.4	7.0
Dublin (168)	4.5	6.9	7.6
Munster (162)	4.6	7.1	7.7
Rest of Leinster (162)	4.6	7.1	7.7
Connaught & Ulster (108)	5.7	8.6	9.4
Adventurers (124)	5.3	8.1	8.8
Buzz Seekers (114)	5.5	8.4	9.2
Explorers (149)	4.8	7.4	8.0
Sightseers (122)	5.3	8.1	8.9
Cultural Buffs (91)	6.2	9.4	10.3

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 Irish 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 representativeness:** 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.