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Visit Wales consumer re-contact survey – Germany report (January 2023)

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This document is also available in Welsh.

Full Research Report: Visit Wales consumer re-contact survey – Germany report (January 2023)

Cardiff: Welsh Government, GSR report number 31/2023.

Available at: <https://www.gov.wales/visit-wales-consumer-re-contact-survey-19-january-3-february-2023>

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

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Background and Methodology



Background

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 tourism destination.

This is a detailed report drawn from an online survey conducted in January 2023 amongst Visit Wales consumer contacts based in Germany (referred to as 'enquirers' throughout the report). Separate reports are available for UK and Ireland, and US enquirers. Consumer contacts are defined as people who engaged with Visit Wales or partner communications, and provided their contact details to Visit Wales in 2022. The specific research objectives were to evaluate:

Trips taken in 2022

- Enquirers' relationship with Wales
- The proportion of enquirers who visited Wales in 2022 for a short break or holiday
- The characteristics of trips taken in Wales and the profile of visitors taking holidays
- The overall experience in Wales and ratings for elements of trips

Marketing impact

- Engagement with Visit Wales communications
- The perceived influence of Visit Wales communication on trip decisions
- The perceived impact of Visit Wales marketing

Trips intentions for 2023

- The proportion of enquirers planning a trip to Wales in 2023
- Anticipated trip characteristics for Wales trips in 2023

Methodology, sample and response rate

Methodology

Enquirers were contacted by Visit Wales via email in January 2022 and asked to complete a 10-15 minute online survey available in German. Reminder invites were sent out to non-openers, and a prize draw incentive was also offered. Participants were given 16 days within which to complete the survey – the survey opening on 19th January and closing on 3rd February.

Sample and response rate

The sample was derived from a number of different sources, reflective of how enquirers had been in contact with Visit Wales.

The table below outlines the sample sources and number of available contacts by sample source and at a total level.

Sample source	Sample sizes
Website enquirers	2,151
Lead generation	2,228
e-CRM	2,253
TOTAL SAMPLE	6,632

From 6,632 invites sent to enquirers, 1,287 completed survey responses were received, **delivering an overall response rate of 19%.**

An explanation of sample sources

VW Website

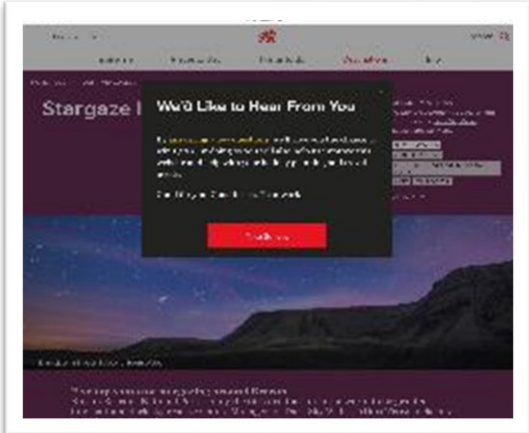
A sample of users of the www.visitwales.com website who completed a short intercept survey across the full calendar year 2022 and who were living in Germany.

Lead Generation

A sample of new users who entered a prize draw from a digital ad on Facebook or Instagram in the calendar year 2022 and who were living in Germany.

e-CRM

A sample of VW newsletter subscribers who were sent and actively engaged with Visit Wales newsletters during the calendar year 2022 and who were living in Germany.



Sample considerations/1

It is important to note that the sample used for this research is not representative of the German population, or of visitors to Wales. The results only represent a proportion of visitors that have an existing relationship with Visit Wales. The below sample considerations should therefore be kept in mind when reading the report:

- 1. Relationship with Wales:** In the main, enquirers will be naturally warmer towards Wales and its marketing, engagement with Visit Wales communications being a prerequisite to taking part in the survey.
- 2. Decision-makers not full visitor parties:** Enquirers are more likely than average to be 'holiday or short break organisers', having given their details at the planning stage of a trip. This may generate profile biases, so it is important to note that profiling refers to enquirers not the full visitor parties.
- 3. Age bias:** The sample also has a strong bias towards older age groups.

Sample considerations/2

The tables below and on the next two pages illustrate these sample considerations, using the following data sources.

- 2022 research respondents:** Respondent proportions from this research study
- 2020 research respondents:** Respondent proportions from the equivalent survey conducted in January 2020
- UK Holiday Market breakdown:** The breakdown of the Germany overnight trip market as of 2020 (pre-pandemic) based on a nationally representative survey amongst holiday decision-makers

Table 1. Relationship with Wales

Relationship with Wales	2023 research respondents (this report)	2020 research respondents	Germany holiday market breakdown*
I often take short breaks or holidays there and intend to do so again within the next year	7%	5%	6%
I sometimes take short breaks or holidays there and intend to do so again in the next couple of years	14%	9%	7%
I have taken a short break or holiday there once or twice before and might do so again	25%	34%	12%
I have never been on a holiday or short break there but would like to	51%	48%	43%
I have taken a short break or holiday there before, but am unlikely to do so again	1%	2%	4%
I have never taken a short break or holiday there before and am not likely to in the future	1%	1%	12%
I don't know	1%	2%	15%



*Market breakdown is based on research conducted amongst a nationally representative sample of Germany trip-takers in January 2020

Sample considerations/3

Table 2. Age profile

Age profile	2023 research respondents (this report)	2020 research respondents	Germany holiday market breakdown*
16-34	9%	9%	24%
35-54	36%	44%	33%
55-64	33%	27%	17%
65+	23%	19%	26%



*Market breakdown is based on research conducted amongst a nationally representative sample of Germany trip-takers in January 2020

Definitions used within this report (1)

In this report we use a number of terms to define the survey respondents. These include:

- **Visit Wales enquirers:** The total survey population - Visit Wales consumer contacts used for this survey.
- **2022 Wales trip-takers:** Visit Wales enquirers that stated within the survey that they took a short break or holiday in Wales in 2022
- **Non-visitors to Wales:** Visit Wales enquirers that stated within the survey that they did not take a short break or holiday in Wales in 2022
- **2023 Wales trip intenders:** Visit Wales enquirers that stated within the survey that they intend to take a short break or holiday in Wales in 2023

To deliver clearer profiles, we also profile by life stage. Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, we have used the following:

- **Pre-nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older independents:** Aged 35-64 with no children in household
- **Retirement age:** Aged 65+

Definitions used within this report (2)

We also use 'social grades' within this report. Social Grade is a classification system based on occupation and broadly aligns with income. It has been used as a standard within market research for a number of decades to build an understanding of respondents alongside a number of other factors. In this report, social grade should be assessed alongside life stage, financial and attitudinal segments. Broadly, social grades are outlined as below:

- **A Higher managerial, administrative and professional**
- **B Intermediate managerial, administrative and professional**
- **C1 Supervisory, clerical and junior managerial, administrative and professional**
- **C2 Skilled manual workers**
- **D Semi-skilled and unskilled manual workers**
- **E State pensioners, casual and lowest grade workers, unemployed with state benefits only**

Key findings



Key findings (1)

Profile of Visit Wales Enquirers

1. Visit Wales enquirers tend to belong to 'older' life stages, with older independents making up over half of enquirers, and nearly 1 in 4 enquirers being of retirement age. This is relatively consistent across sample sources, although 'lead generation' enquirers are less likely to be retirees.
2. Around a third of enquirers belong to social grades AB, while a further 3 in 10 belong to social grade C1, suggesting a high disposable income for most enquirers. Only around 1 in 3 belong to lower social grades C2DE.
3. Enquirers are spread across Germany, although enquirers are most likely to be from North Rhine-Westphalia, Bavaria and Baden-Württemberg – three of the most populated areas in Germany.

2022 trip conversion and relationship with Wales

1. Around half of Visit Wales enquirers from Germany have been to Wales for a short break or holiday at some point in their lives – 7% do so often, 14% sometimes, and 25% have done so once or twice and might do so again. Website and e-CRM enquirers are the most likely to report that they visit Wales regularly or have visited Wales at some point – lead generation enquirers are the least likely to report regularly visiting or having visited previously.
2. 1 in 10 German-based enquirers visited Wales for a holiday or short break in 2022, taking 2 trips on average. The rate of trip conversion varied by sample source – website enquirers had the highest rate of conversion (at 13%), followed by e-CRM (9%) and lead generation (4%). All life stages reported similarly strong trip-taking behaviour but – aligned with the enquirer population – older independents had by far the strongest representation.
3. Residents of North Rhine-Westphalia, Bavaria, Baden-Wurttemberg, Lower Saxony and Hesse have the strongest representation among 2022 Wales trip-takers, which aligns with the enquirer population.
4. Of the German enquirers that have visited Wales in the past, most (35% of all enquirers) did not do so in 2022. 8% of enquirers visited in 2022 and earlier – 2% were visiting Wales for the first time in 2022.

Key findings (2)

2022 trip characteristics

1. Wales trip-takers from Germany were most likely to have taken their trip to Wales in August, followed closely by September. May, June, July – and to a lesser extent October – were also popular, with only a minority taking a trip from January to April and October to December.
2. On average German visitors' trip length was 12.4 nights – the majority (67%) staying away for 8 nights or more. However, it's likely some of those nights were spent outside of Wales. Two thirds of Wales trip-takers visited elsewhere in the UK and Ireland on their trip – the majority in England. Of those that only stayed in Wales, the average trip length was 10.5 nights.
3. The tendency for German trip-takers to stay in more than one place was further underlined, with 46% of trip-takers stating they 'stayed overnight in several places' in Wales, visiting 1.5 regions on average. Of these, South West Wales was the most popular, although only marginally ahead of North Wales.
4. The main draw for a trip to Wales amongst Wales trip-takers was 'to connect with nature/be outdoors', reported by 59% of trip-takers. A positive experience on a previous stay was also a driver for German trip-takers – 45% stating they were visiting because they have 'been before and wanted to go again' and 31% because they wanted to 'visit a part of Wales they hadn't been to before'. A notable 1 in 4 (26%) were visiting 'for adventure or an active holiday'.
5. Aligned with a motivation 'to connect with nature/be outdoors', 'walking, hiking or rambling' was the most popular activity for trip-takers on their 2022 trip, followed by 'trying local food and drink' and 'visiting heritage sites or cultural attractions. Around half explored scenic areas by car on their trip, underlining the 'multi-destination' nature of visits.
6. 'Hotels or motels' were the preferred accommodation type amongst Wales trip-takers from Germany (33% staying in this category) followed by 'guest house/B&B' (at 21%). Almost 2 in 5 (38%) of Wales trip-takers booked their accommodation 'directly with an accommodation provider' and nearly 3 in 10 (29%) booked via a 'travel website' – the next most popular booking option. 1 in 7 'just turned up', the majority of whom either stayed in a tent or with family/friends. Notably, a quarter (24%) of Wales trip-takers stated they found their accommodation on the Visit Wales website.

Key findings (3)

7. Almost 9 in 10 (87%) Wales visitors from Germany rated their experience in Wales as 'excellent'. Ratings were highest amongst those that stayed in North Wales, with 93% scoring their experience as 'excellent'.
8. When assessing individual elements of the trip, Wales trip-takers from Germany were very satisfied with a range of areas. They were most satisfied with 'the welcome they received', followed by the 'quality of the natural environment', 'customer service', and 'feelings of safety'. Ratings were lower – although still positive – for the 'availability' and 'quality' of 'things to do'. Ratings were lowest for 'the cost of car parking', 'accessibility' (although amongst a low base size), 'the availability of public transport' and 'the cleanliness of public toilets'.

Key findings (4)

Marketing Impact

1. Wales trip-takers were most likely to report having seen or heard about Wales through 'promotion or content on a website' in 2022 (37%), closely followed by 'promotion or content from an organisation on social media' (36%). Around 3 in 10 had seen or heard about Wales through 'an article in a newspaper or magazine' (31%).
2. In terms of specific Visit Wales communications, engagement is highest with Visit Wales e-newsletters and the Visit Wales website, with four fifths of 2022 Wales trip-takers reporting engaging with each. Around 3 in 10 enquirers (and 4 in 10 trip-takers) recall engaging with Visit Wales social media.
3. Visit Wales communications may have had an impact on the decision to visit Wales in 2022. Just under 3 in 10 trip-takers stated that Visit Wales communications were an influence on their decision to take their holiday or short break in Wales, and around a third of trip-takers reported that they were undecided on whether they would visit Wales at the end of 2021.
4. 'I visited more places than I originally planned to' was the main way in which Visit Wales communications impacted Wales trips taken in 2022. This was followed by 'I visited a part of Wales I hadn't been to before' and 'I visited Wales outside of the summer season'.
5. Around 2 in 5 Wales 2023 trip intenders indicated that Visit Wales communications have already had an influence on their decision to take their 2023 trip.

Reasons for not taking trips to Wales in 2022

1. Of the enquirers that did not visit Wales in 2022, half (50%) were considering going there, highest amongst families (59%) and lowest amongst retirees (45%). Only 13% of non-visitors to Wales in 2022 'went somewhere else in the British Isles or Ireland instead', England generating the most visits. Around 1 in 3 'went somewhere else abroad' (36%) or 'did not take a holiday at all' (32%), while just over 1 in 4 (26%) 'booked a holiday in Germany'.
2. 'Personal circumstances' was the most common reason given for not visiting Wales in 2022 (high amongst all life stages but particularly so for pre-nesters and families'). The next most popular reasons were 'I was still nervous about travelling due to COVID' (also high amongst all life stages but highest amongst retirees) and 'I couldn't afford a trip to Wales' (highest amongst families).

Key findings (5)

Intention to take a trip in Wales in 2023

1. 4% of enquirers have already booked a Wales trip in 2023, with a further 8% stating they will 'definitely' go but have not booked. A further 16% state they are 'probably' going. 7 in 10 (72%) are either unsure or will probably/definitely not take a holiday or short break in Wales in 2023. Amongst non-intenders for 2023, there is interest in a trip further ahead – around half report that they are planning a trip in either 2024 or 2025.
2. Wales 2022 enquirers are most likely to take their trip in September 2023, driven by older independents and retirees. August is also a popular month – driven by families – as are May, June, July and October.
3. The most popular Wales destination for a 2023 trip is South West Wales (43%), closely followed by South East Wales (including Cardiff) (41%) and North Wales (36%). 1 in 4 (26%) plan on visiting Mid-Wales.
4. Two thirds (65%) of 2023 trip intenders plan on visiting Wales in 2023 with their partner, with 1 in 5 expecting to do so with their children or grandchildren. 1 in 6 expect to travel to Wales on their own.
5. Unsurprisingly families are the most likely to plan on taking a Wales trip with children.

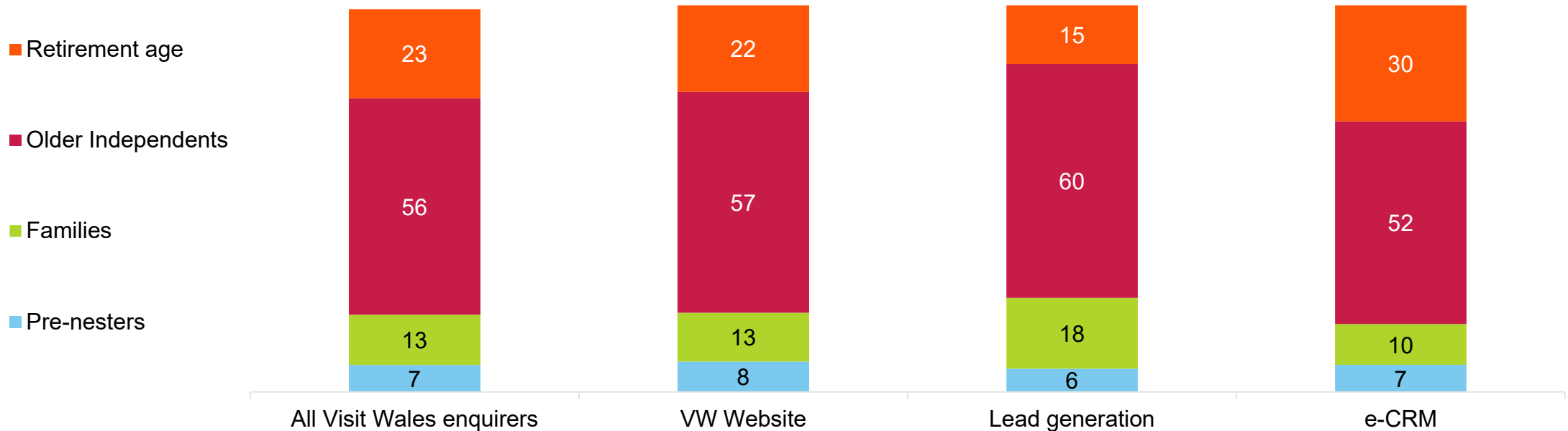
Profile of Visit Wales Enquirers



Life stage of enquirers

- The vast majority of German enquirers are made up of older independents (56%) and retirees (23%), with families and pre-nesters making up 2 in 5 (20%) between them.
- Each sample source has a higher proportion of 'older' age profiles than 'younger' ones, although e-CRM has a higher proportion of retirees – at 30%, above the proportion of retirees in the overall sample.

Figure 1. Life stage of enquirers, Percentage, All Enquirers and by sample source



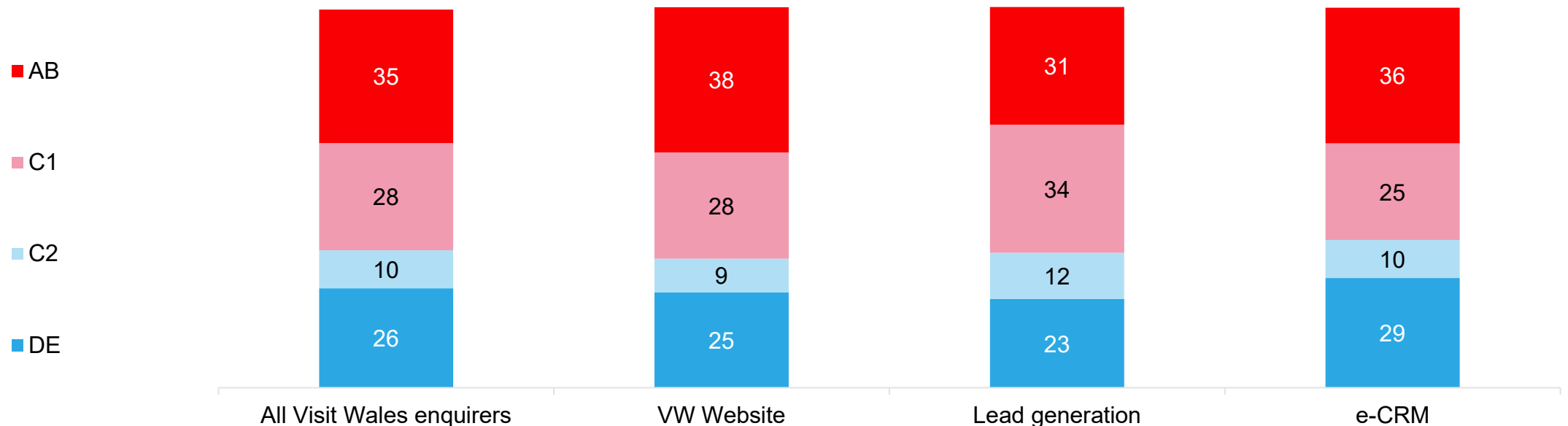
Demographics questions

Base: All Visit Wales enquirers excluding 'prefer not to say' n=1,258; VW Website n=532; Lead generation n=316; e-CRM n=410

Social grade of enquirers

- Just over a third (35%) of all German Visit Wales enquirers belong to the high social grades AB, with just under 3 in 10 belonging to social grade C1 (28%) and over 1 in 3 (36%) to social grades C2DE.
- All sample sources are majority ABC1, although a lower proportion of lead generation enquirers belong to social grades AB, and a higher proportion belong to social grade C1 than in the overall sample.

Figure 2. Social grade of enquirers, Percentage, All Enquirers and by sample source



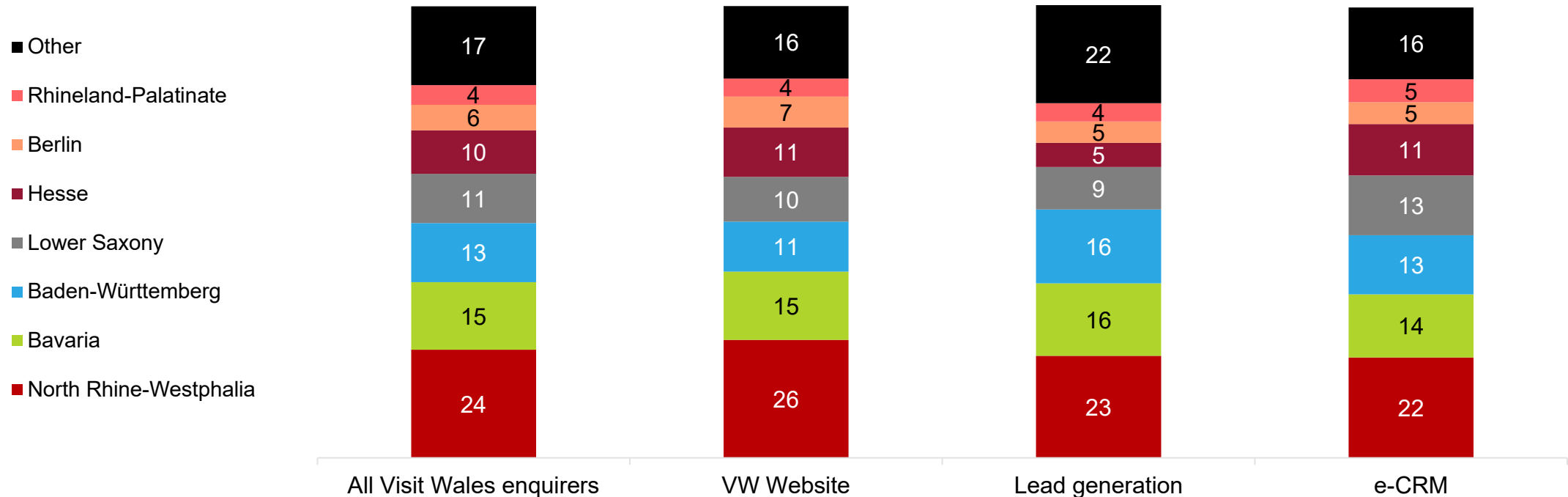
X4a. Which one of these best describes the occupation of the main income earner in your household?

Base: All Visit Wales enquirers excluding 'prefer not to say' n=1,164; VW Website n=497; Lead generation n=289; e-CRM n=383

Region of residence of enquirers

- Visit Wales enquirers are from a range of regions across Germany. North Rhine-Westphalia, Bavaria and Baden-Württemberg are the leading areas of origin. This is consistent across sample sources.

Figure 3. Origin of enquirers by Germany region, Percentage, All enquirers and by sample source



X3a: Where in Germany do you live?

Base: All Visit Wales enquirers n=1,287; VW Website n=546; Lead generation n=319; e-CRM n=422

2022 trip conversion and relationship with Wales

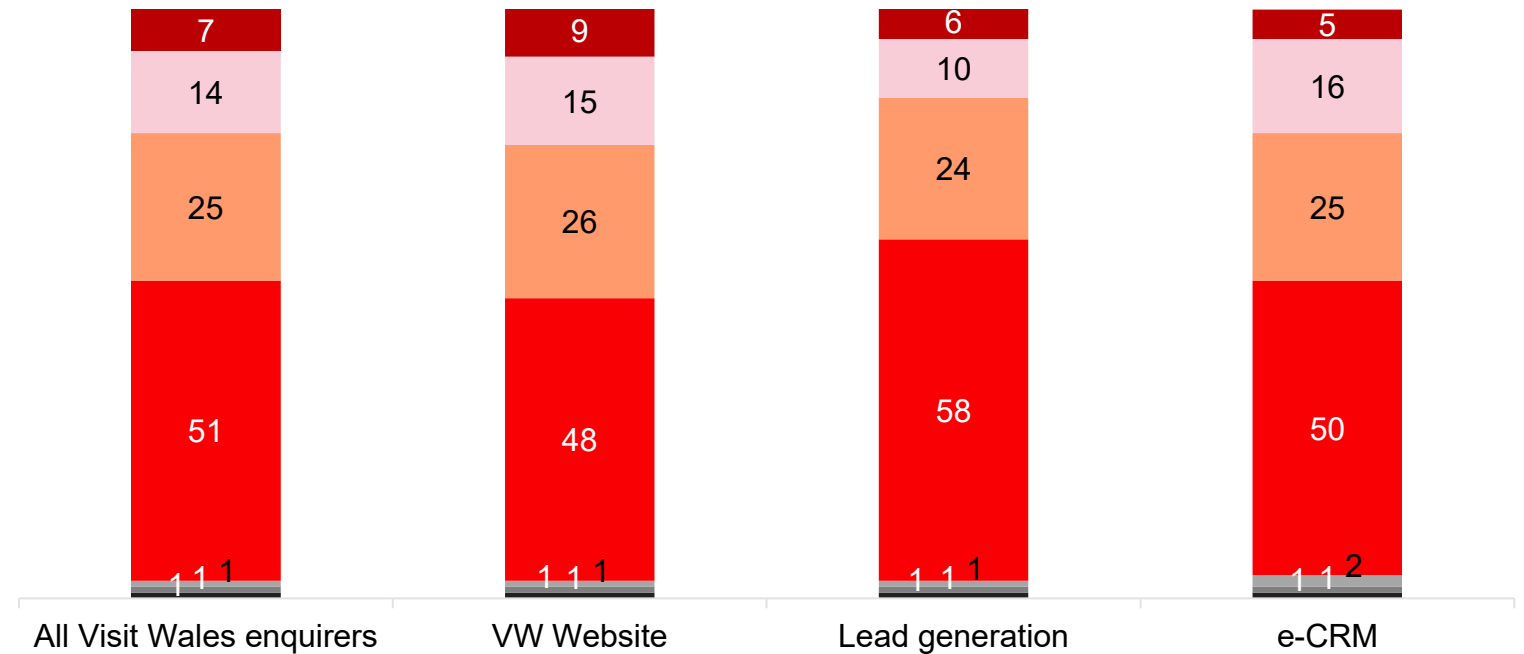


Loyalty of visitation with Wales

- Around half of German Visit Wales enquirers have visited Wales for a holiday or short break at some point – a small proportion (7%) ‘often’ doing so, around 1 in 7 (14%) ‘sometimes’ doing so and 1 in 4 having done so ‘once or twice before’ and ‘might do so again’.
- Lead generation enquirers are the least likely to have ever been to Wales for a holiday or short break – 59% falling into this category. Other sample sources are in line with the average.

Figure 4. Relationship with Wales, Percentage, All Enquirers

- I often take short breaks or holidays there and intend to do so again within the next year
- I sometimes take short breaks or holidays there and intend to do so again in the next couple of years
- I have taken a short break or holiday there once or twice before and might do so again
- I have never been on a holiday or short break there but would like to
- I have taken a short break or holiday there before, but am unlikely to do so again
- I have never taken a short break or holiday there before and am not likely to in the future
- I don't know



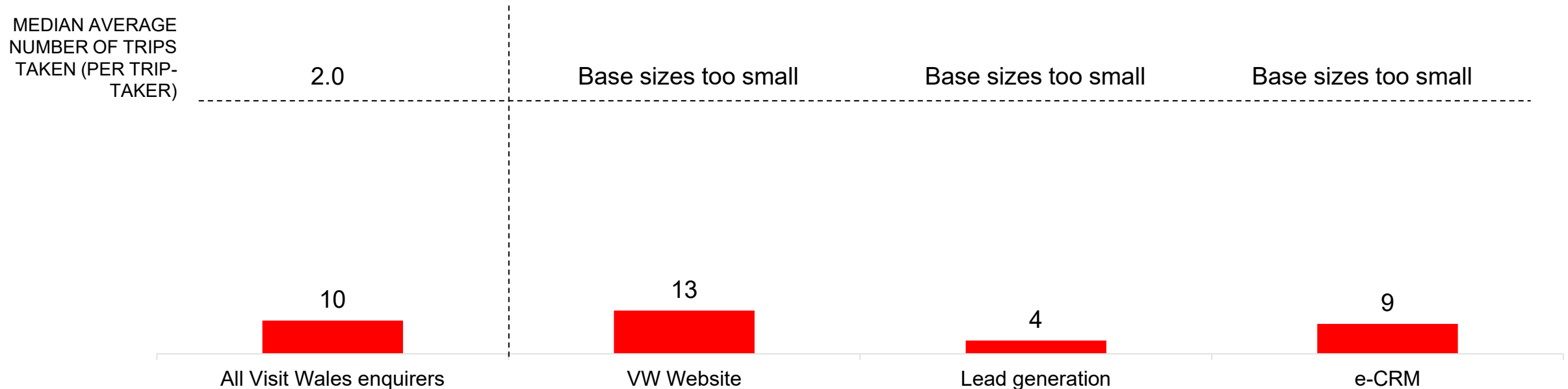
A1. Which of the following statements best applies to you when it comes to visiting Wales?
 Base: All Visit Wales enquirers n=1,287; VW Website n=546; Lead generation n=319; e-CRM n=422



Whether took a short break or holiday in Wales in 2022

- 1 in 10 (10%) German Visit Wales enquirers stated that they took a holiday or short break in Wales in 2022, with some variation across sample sources. VW website enquirers were the most likely to have taken an overnight Wales trip, with lead generation enquirers the least likely to.
- On average, Visit Wales trip-takers from Germany took 2 trips to Wales in 2022.

Figure 5. Whether took a short break or holiday in Wales in 2022, Average and Percentage, All Enquirers and by sample source



A2a. Did you take a holiday or short breaks did you take in Wales in 2022?

Base: All Visit Wales enquirers n=1287 ; VW Website n=546; Lead generation n=319; e-CRM n=422

All 2022 Wales trip-takers n=123; VW Website n=73; Lead generation n=14*; e-CRM n=36* *Caution: Low base size



Whether took a short break or holiday in Wales in 2022

- The profile of Wales 2022 trip-takers amongst German enquirers is broadly aligned with the total German enquirer population. They tend to be 'older' – the majority are older independents or retirees, and they are most likely to live in North Rhine-Westphalia, Bavaria, Baden-Württemberg, Lower Saxony and Hesse.

Figure 6. Breakdown of Wales 2022 trip-takers by life stage, Percentage

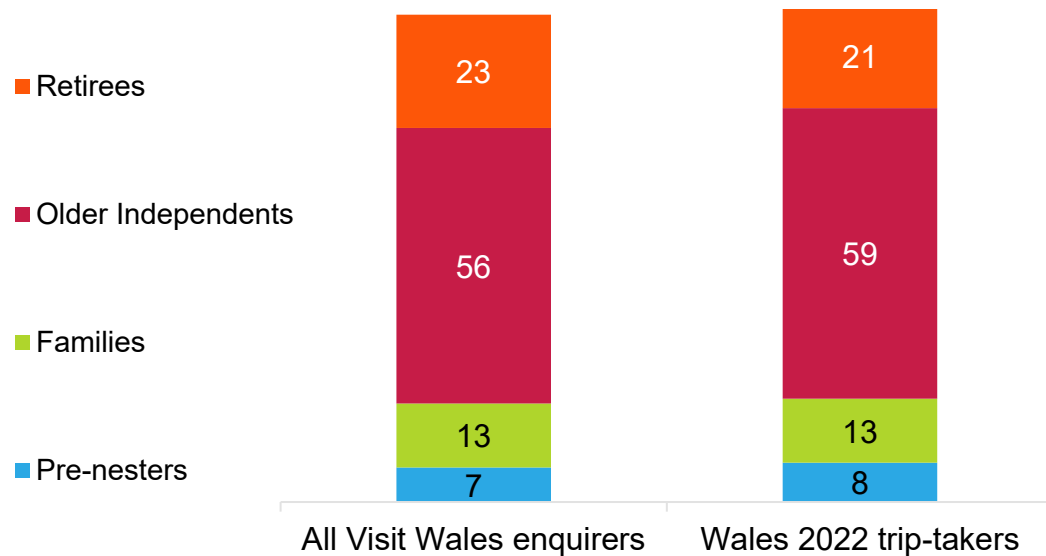
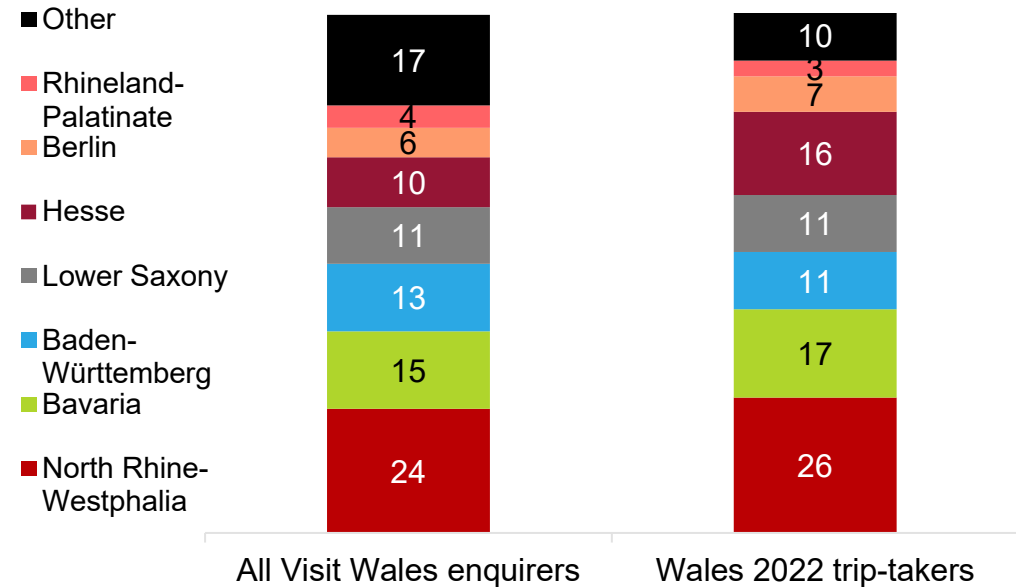


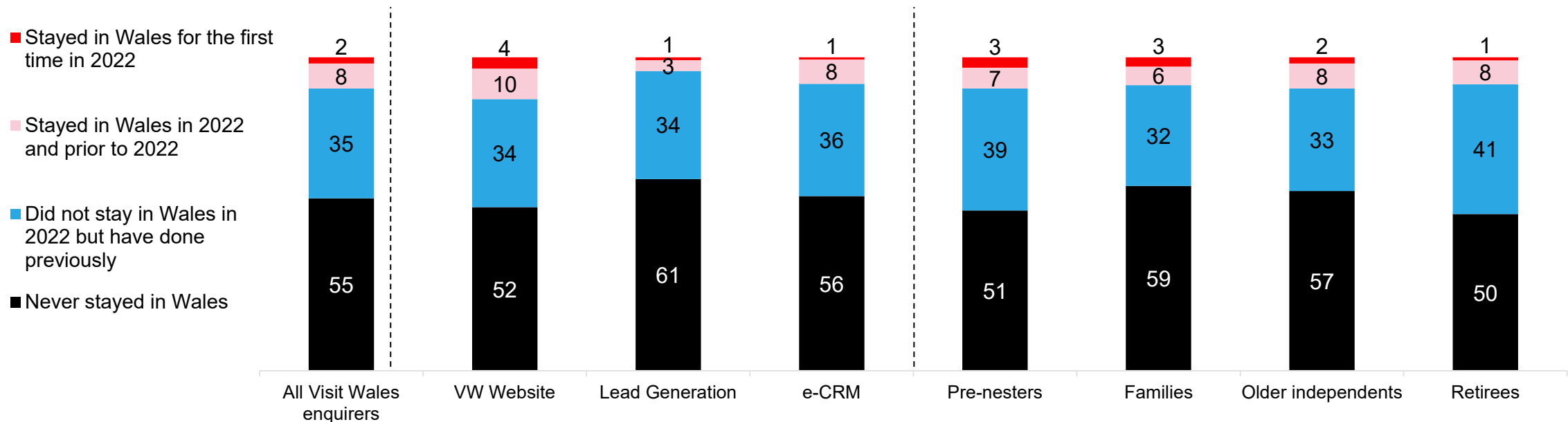
Figure 7. Breakdown of Wales 2022 trip-takers by region of residence, Percentage



When taken holidays or short breaks in Wales

- The majority of German enquirers have never taken a holiday or short break in Wales – consistent across all sample sources and life stages, although retirees and pre-nesters are most likely to have taken a previous trip. A small proportion (2%) stayed in Wales for the first time in 2022, with around 1 in 12 (8%) staying in Wales in 2022 and prior to 2022. Around a third of enquirers did not stay in Wales in 2022 but have done so previously.

Figure 8. When taken holidays or short breaks in Wales, Percentage, All Enquirers, By sample source and life stage



A2a. Did you take a holiday or a short break in Wales in 2022? A2b. Have you taken a holiday or short break in Wales prior to 2022? Base: All Visit Wales enquirers n=1,287; VW Website n=546; Lead generation n=319; e-CRM n=422; Pre-nesters n=90; Families n=168; Older Independents n=710; Retirees n=290

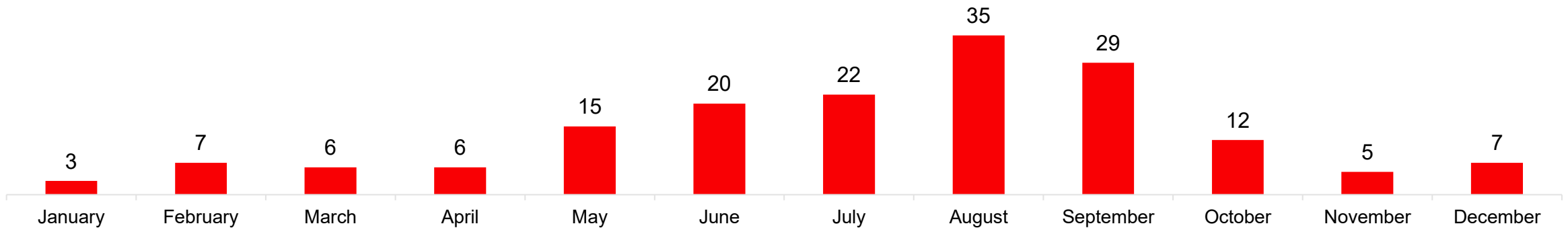
2022 trip characteristics



Month trip taken and number of nights stayed in Wales in 2022

- Over a third (35%) of 2022 Wales trip-takers from Germany took their trips in August, more than a quarter took their trips in September (29%), and over 1 in 5 (22%) took their trips in July.
- Only a small proportion of trip-takers took their trip in Wales between January to April and November to December.

Figure 9. Month trip taken in Wales in 2022, Percentage, All 2022 Wales trip-takers



A4.And in which months of the year did you visit Wales for a short-break or holiday in 2022?

Base: All 2022 Wales trip-takers n=123

Number of nights on Wales trip and party composition

- German trip-takers to Wales spent 12.4 nights away from home on average – just under a third reported staying away for 3 nights or less – although this number likely includes trips to other parts of the UK and Ireland too.
- The average total party size was 2.5, comprised predominantly of adults. Only a very small proportion of German trip-takers took their overnight trip with children or pets.

Figure 10. Trip length of Wales overnight stay, Percentage, All 2022 Wales trip-takers

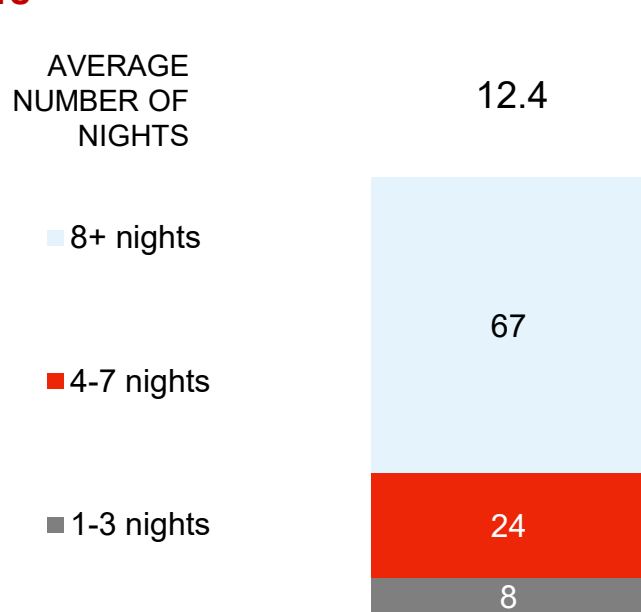
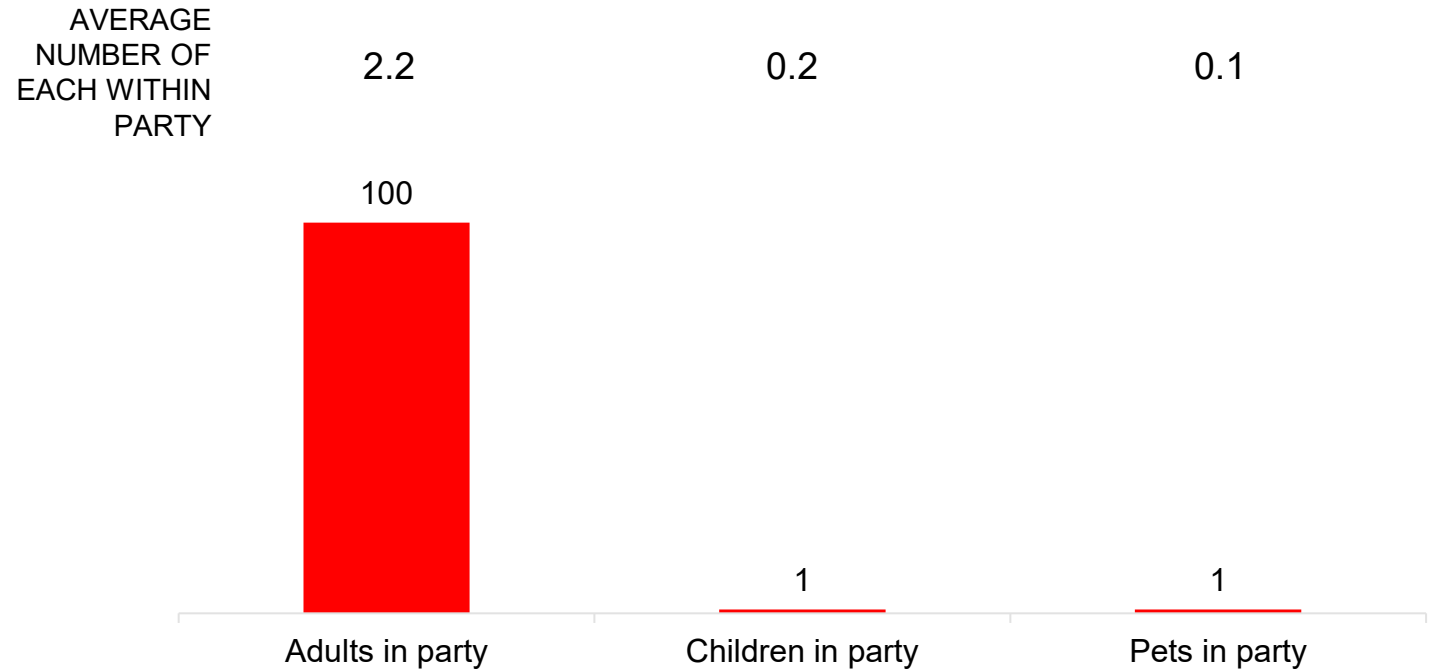


Figure 11. Party composition of Wales trip-takers in 2022, Average and Percentage, All 2022 Wales trip-takers



A5. On this overnight trip to Wales in [MONTH], how many nights did you stay away for? A6. Including yourself, how many of the following were there in your immediate party on this overnight trip to Wales in [MONTH]?

Base: All 2022 Wales trip-takers n=123. Note: Responses to this question and all subsequent 2022 trip-related questions are based on one randomly selected trip the respondent took in Wales in 2022.

Visits elsewhere in UK or Ireland

- Two thirds (66%) of Wales trip-takers from Germany stayed elsewhere in the UK and Ireland as well as staying in Wales – an almost equal split between doing so before and after. The vast majority (86%) of these individuals stayed in England although approximately 1 in 6 stayed in Scotland and Ireland.

Figure 12. Visits elsewhere in UK or Ireland as part of the same trip, Percentage, All 2022 Wales trip-takers

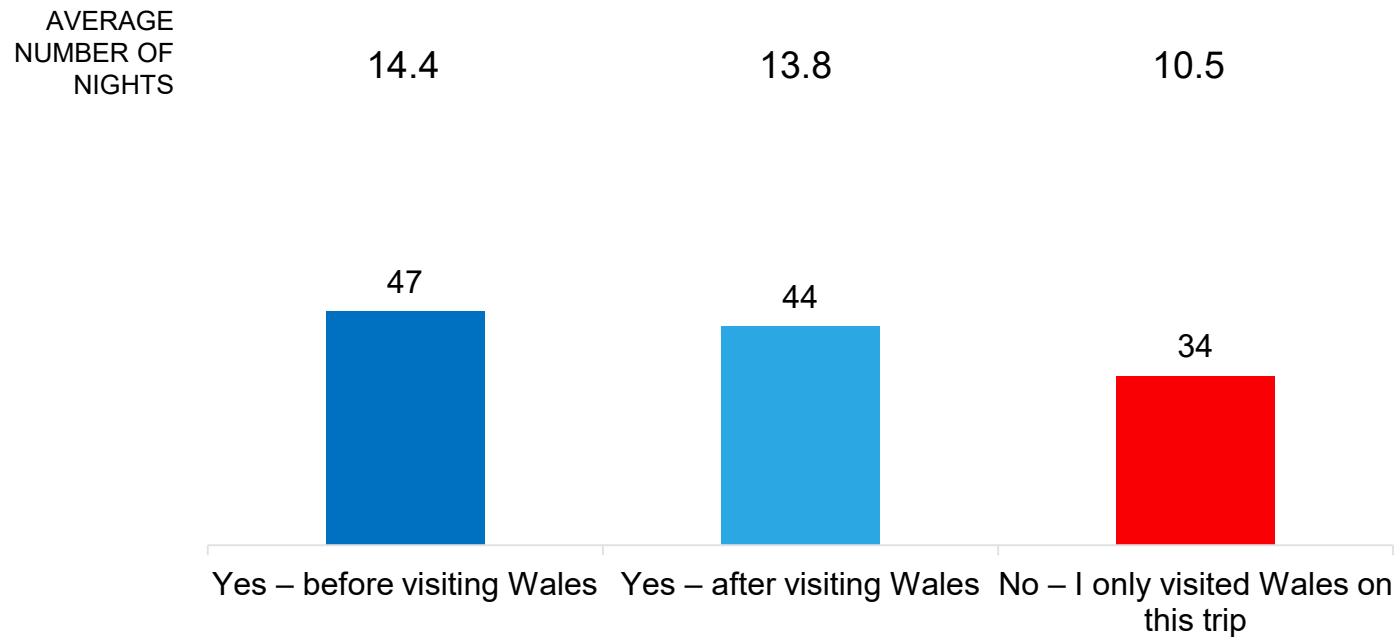
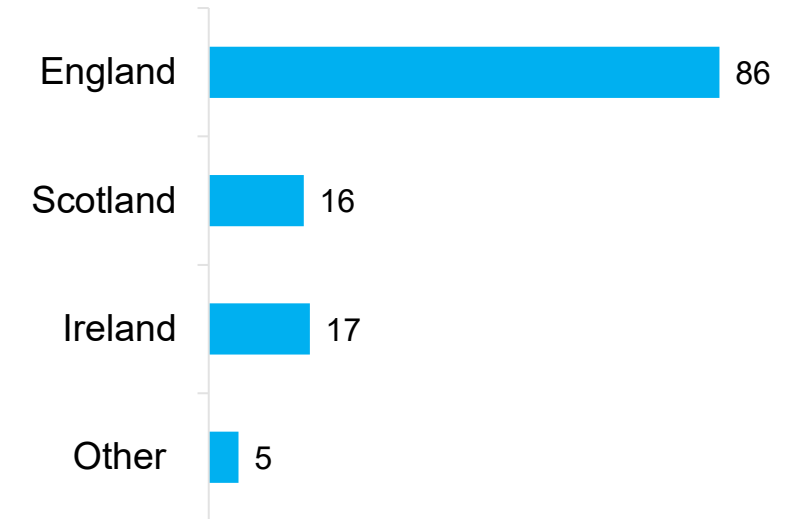


Figure 13. Where else stayed in UK or Ireland, Percentage, All 2022 Wales trip takers that stayed elsewhere



A8. Did you stay overnight in any other parts of the UK or Ireland as part of this same trip? Base: All 2022 Wales trip-takers n=123. A8b. Where else, if anywhere, in the UK and Ireland did you stay overnight on this trip? Base: All 2022 Wales trip-takers that stayed elsewhere n=81

Where stayed in Wales during trip in 2022

- South West Wales was the region of Wales attracting the highest number of overnight visits from German enquirers (with half of trip-takers staying there), closely followed by North Wales (at 45%).
- Just over half of Wales overnight visitors from Germany stayed in one location on their trip (53%), and a similar proportion of trips takers (46%) stayed overnight in several places.

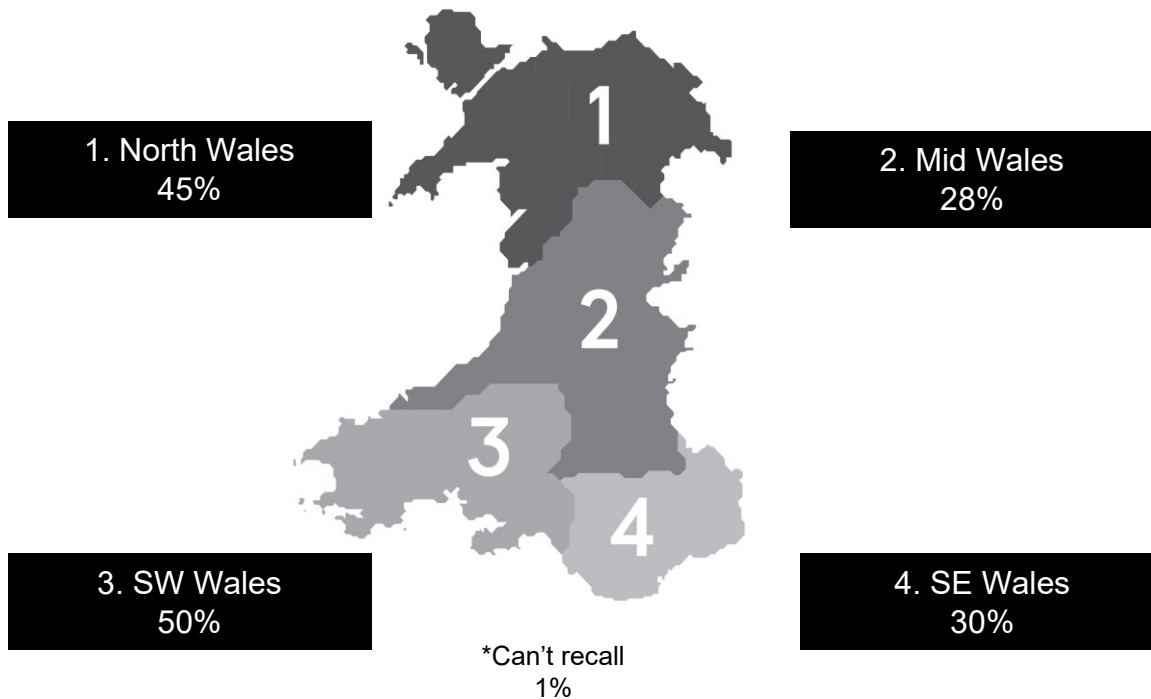
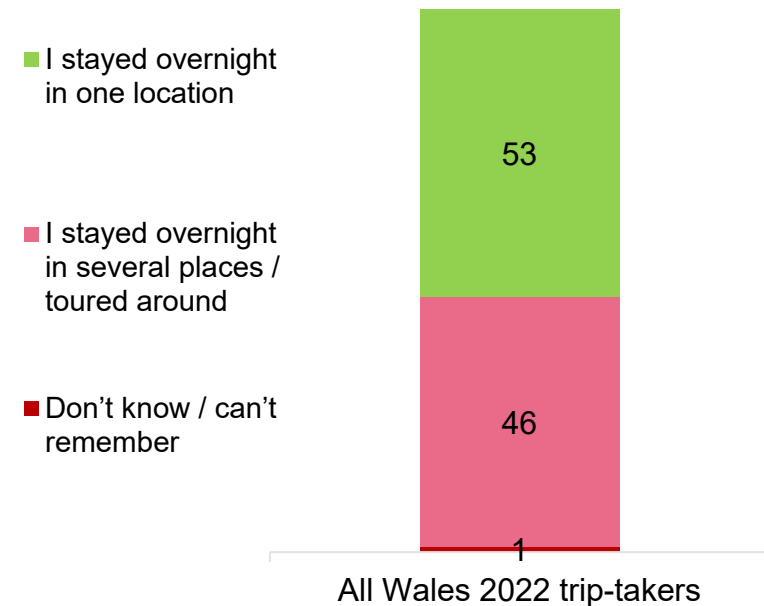


Figure 14. Type of trip taken on Wales trip, Percentage, All 2022 Wales trip-takers



Reasons for choosing Wales as a destination in 2022

- A number of motivations were cited for choosing Wales as a holiday or short break destination in 2022 – nearly 3 in 5 (59%) stating they went ‘to connect with nature/be outdoors’, and nearly half (45%) because they have ‘been before and wanted to go again’ (45%). A similar proportion stated they visited ‘to experience the culture and heritage’ (41%).
- A number of other reasons were also cited, including ‘to get away from it all and have a rest’ (33%), ‘to spend time with family or friends’ and ‘to visit a part of Wales I hadn’t been to before’ (both at 31%). 27% visited because they have ‘family/friends who live there’, and a notable 1 in 4 (26%) were visiting ‘for adventure or an active holiday’.

Figure 15. Reasons for choosing Wales as a destination, Percentage, All 2022 Wales trip-takers

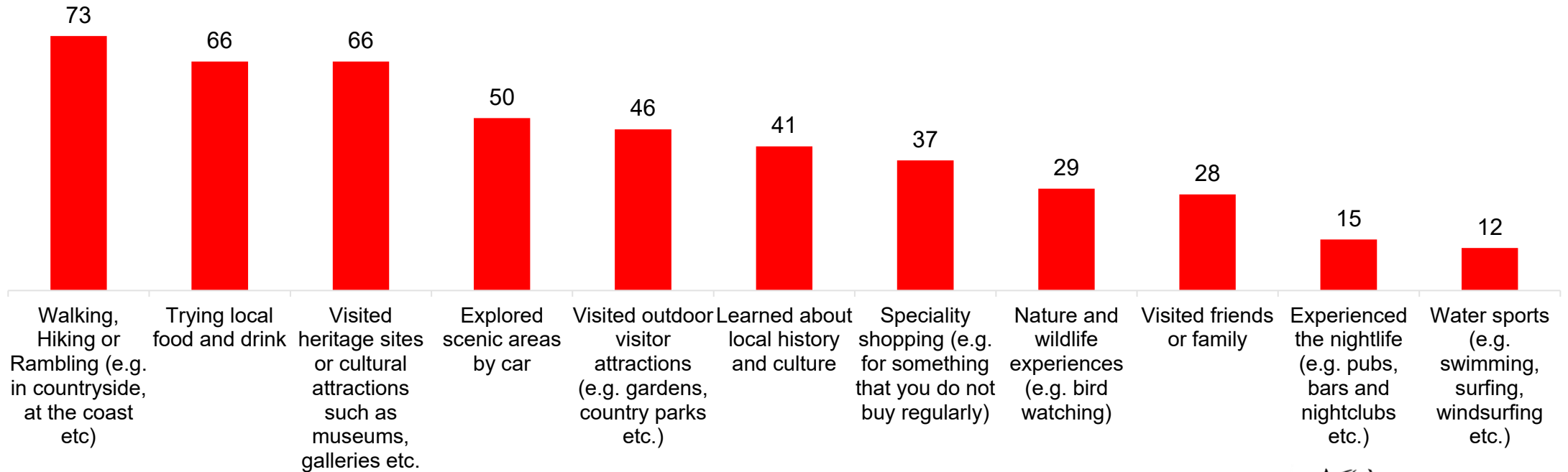


A7. Which, if any, of the following were the main factors that made you choose Wales as a destination for this holiday/short break in [MONTH]? Base: All 2022 Wales trip-takers n=123

Trip behaviour on Wales trip in 2022 – Top 11

- Aligned with a motivation 'to connect with nature/be outdoors', 'walking, hiking or rambling' was the most popular activity for trip-takers on their 2022 trip, followed by 'trying local food and drink' and 'visiting heritage sites or cultural attractions'. The popularity of 'exploring scenic areas by car' (50%), and 'visiting outdoor visitor attractions' (46%) also aligned with the motivation 'to connect with nature/be outdoors'. A notable 3 in 10 'visited friends or family'.

Figure 16. Activities conducted on Wales trip, Percentage Top 11, All 2022 Wales trip-takers



A14. Which, if any, of the following did you do on this trip in Wales in [MONTH]?

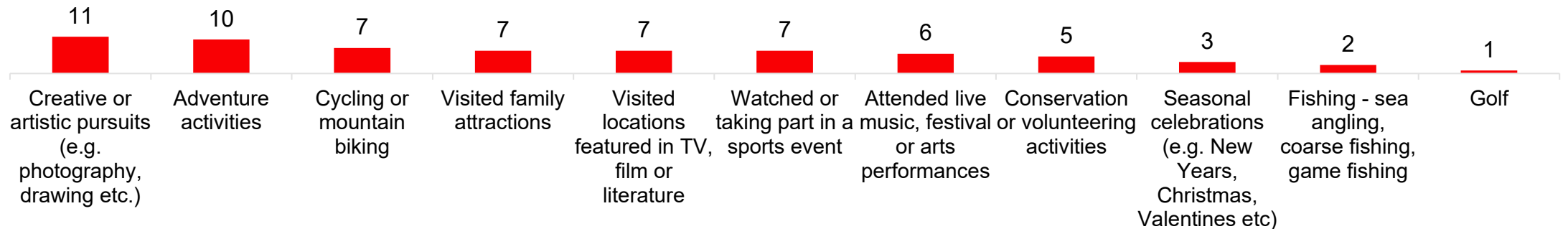
Base: All 2022 Wales trip-takers n=123



Trip behaviour on Wales trip in 2022 – Bottom 11

- A range of other activities were conducted by a more niche proportion of Wales visitors. For example, 11% undertook 'creative or artistic pursuits', 1 in 10 undertook 'adventure activities', and 'cycling or mountain biking', 'visiting family attractions', 'visiting TV/film/literature locations' and 'watching or taking part in a sports event' were each undertaken by 7% of trip-takers.

Figure 17. Activities conducted on Wales trip, Percentage Bottom 11, All 2022 Wales trip-takers



A14. Which, if any, of the following did you do on this trip in Wales in [MONTH]?

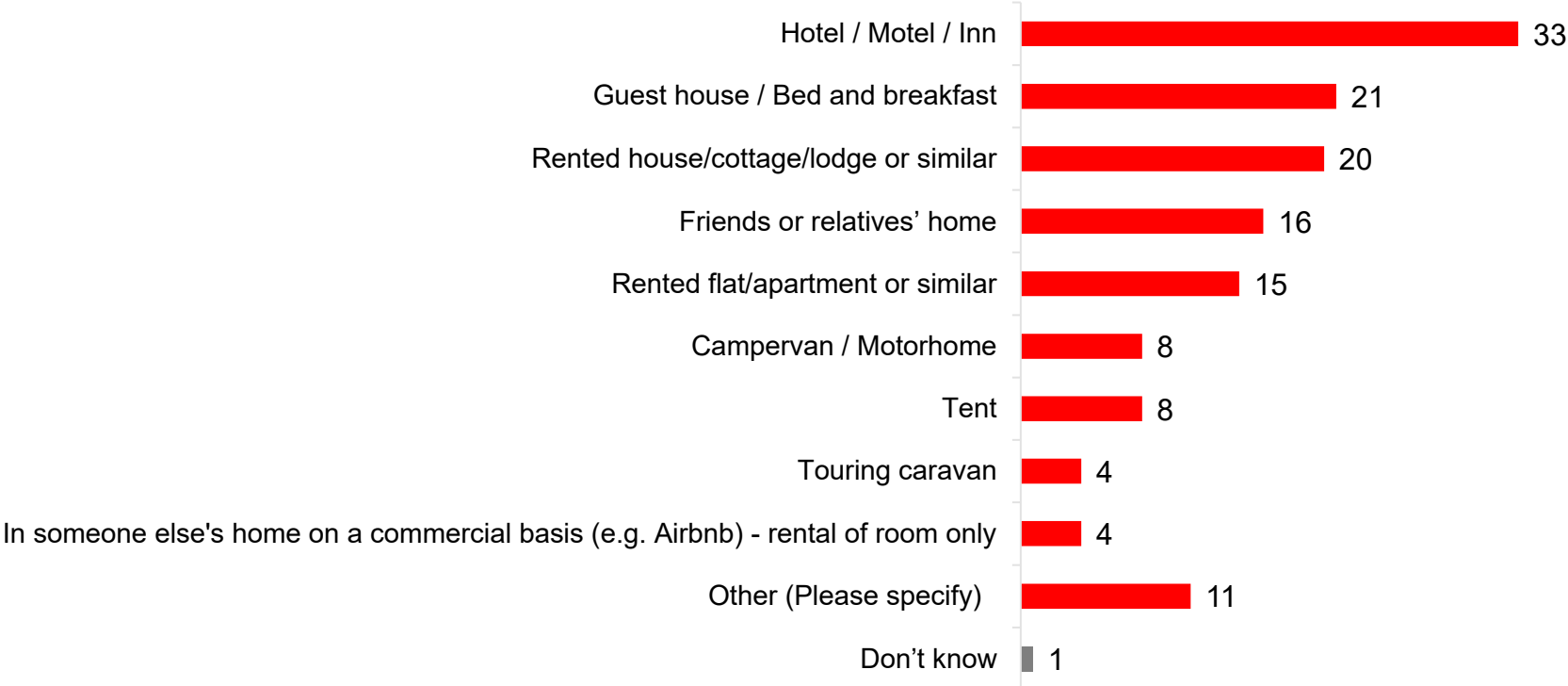
Base: All 2022 Wales trip-takers n=123



Accommodation stayed in during Wales trip in 2022

- 'Hotels or motels' were the preferred accommodation type amongst Wales trip-takers in 2022 (33% staying in this category) followed by 'guest house/B&B' (at 21%). A range of other accommodation types were also chosen, including 'rented house/cottage/lodge' (20%) and 'friends' or relatives home' (16%).

Figure 18. Accommodation stayed in during Wales trip, Percentage. All 2022 Wales trip-takers



A11.What type/s of accommodation did you stay in during your trip in [month] in Wales?

Base: All 2022 Wales trip-takers n=123

Note: Responses to this question and all subsequent 2022 trip-related questions are based on one randomly selected trip the respondent took in Wales in 2022. All responses under 3% are combined into 'other'.



How accommodation was booked for Wales trip in 2022

- Almost 2 in 5 (38%) of Wales trip-takers booked their accommodation ‘directly with an accommodation provider’ and nearly 3 in 10 (29%) booked via a ‘travel website’ – the next most popular booking option. Approximately 1 in 7 ‘just turned up’, the majority of whom either stayed in a tent or with family/friends.
- Notably, just under a quarter (24%) of Wales trip-takers stated they found their accommodation on the Visit Wales website

Figure 19. How accommodation was booked for Wales trip, Percentage, All 2022 Wales trip-takers

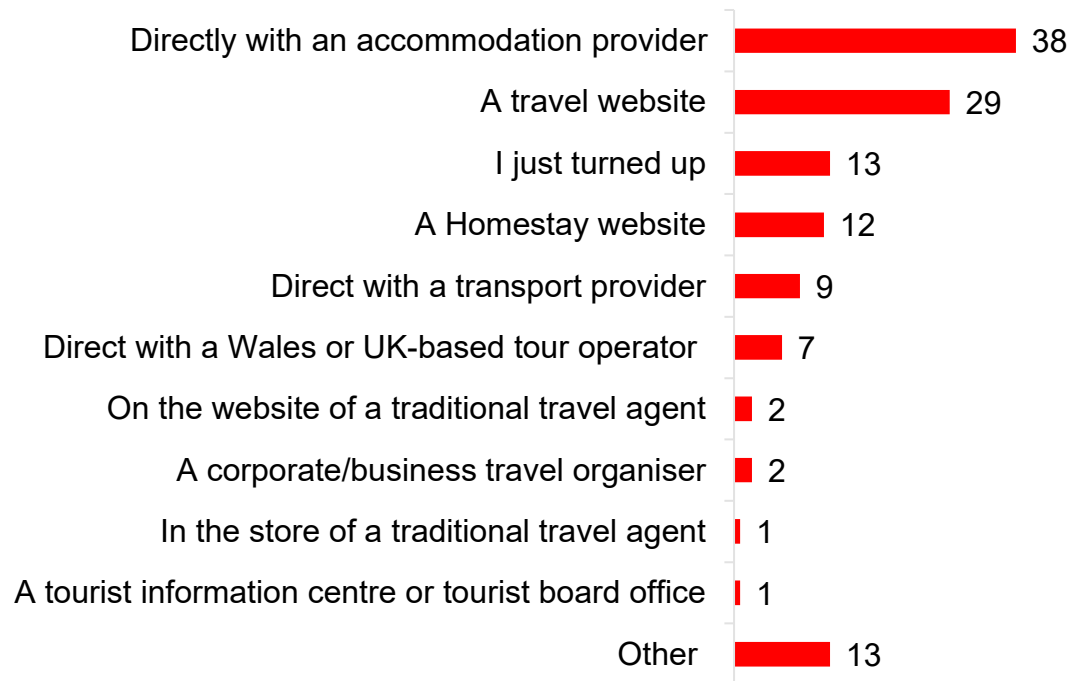
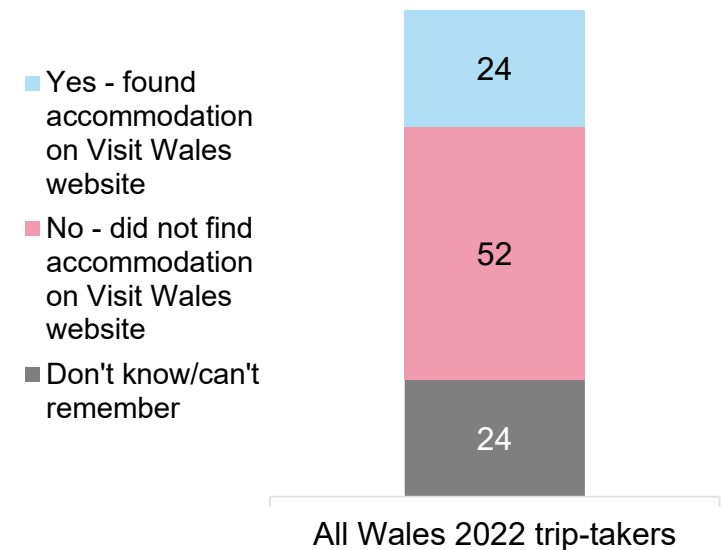


Figure 20. Whether found accommodation on Visit Wales website, Percentage, All 2022 Wales trip-takers

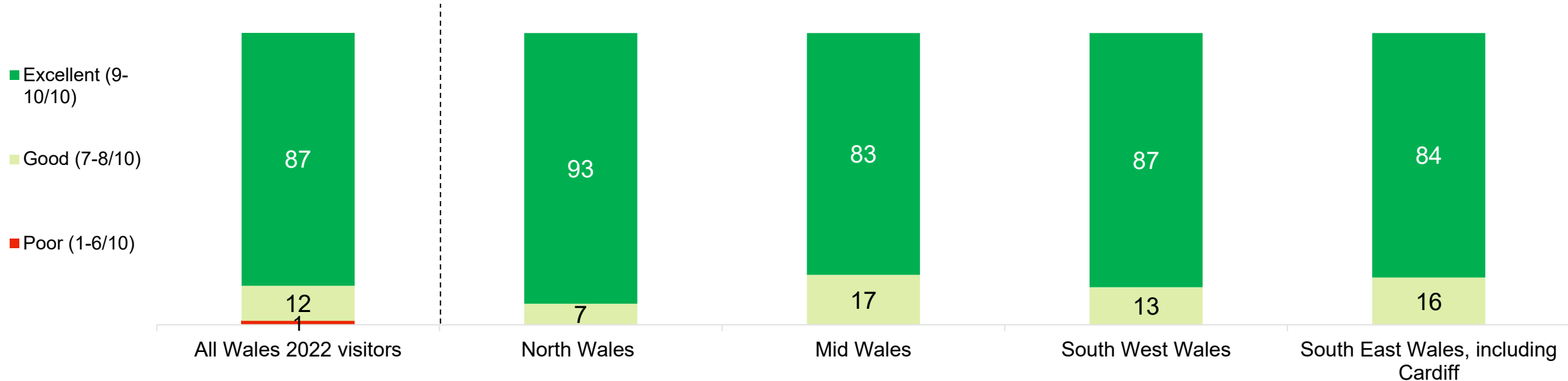


A9.How did you book your accommodation for this trip to Wales? A10.Did you find information or contact details for the accommodation you stayed in on the Visit Wales website? Base: All 2022 Wales trip-takers n=123

Rating of experience staying in Wales

- Almost 9 in 10 (87%) Wales visitors from Germany rated their experience in Wales as 'excellent'. Ratings were highest amongst those that stayed in North Wales – 93% scoring their experience as 'excellent'.**

Figure 21. Rating of experience staying in Wales, Percentage, All 2022 Wales trip-takers



A15. Now going back to your overnight trip in Wales in <INSERT MONTH>, how would you rate your experience overall?
 Base: All 2022 Wales trip-takers n=123. North Wales n=55; Mid Wales n=35*; South West Wales n=62; South East Wales, including Cardiff n=37*

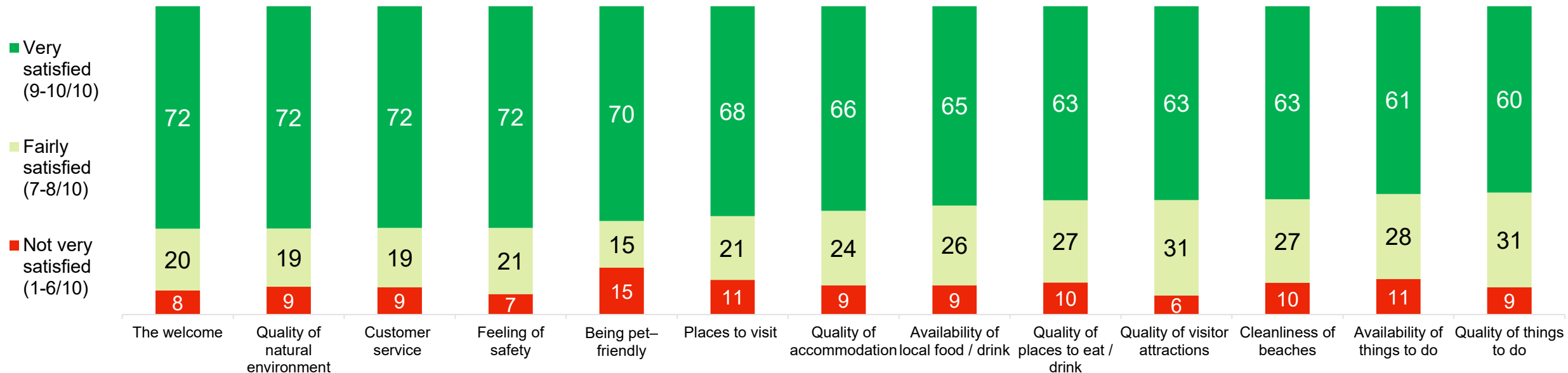
*Caution: Low base size **Please note ratings of destinations are inferred from where trip-takers stayed in Wales – they do not represent a direct rating of each destination



Satisfaction with different elements of the Wales experience

- When assessing individual elements of the trip, Wales trip-takers from Germany were very satisfied with a range of areas. They were most satisfied with 'the welcome they received', followed by the 'quality of the natural environment', 'customer service', and 'feelings of safety'. Ratings were lower – although still positive – for the 'availability' and 'quality' of 'things to do'.

Figure 22. Satisfaction with different elements of the Wales visit experience, Percentage, Top 13, All 2022 Wales trip-takers



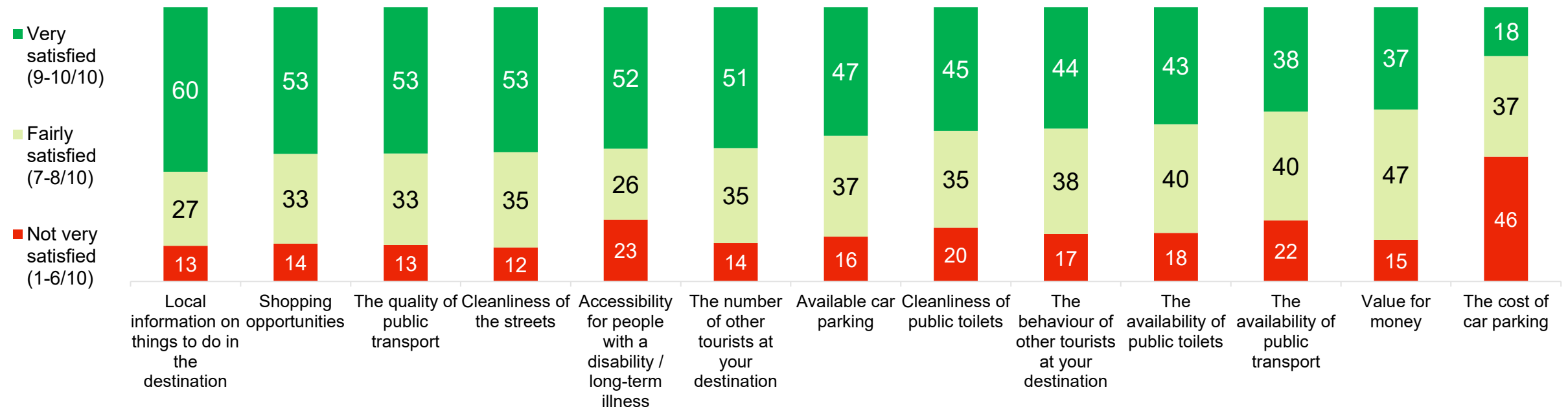
A16/17. How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>?
 Base: All 2022 Wales trip-takers n=123. NA responses removed from all options to reflect the ratings of those for whom statements are relevant. Please note low base size for 'being pet friendly' n=33. All other base sizes n=60 and above



Satisfaction with different elements of the Wales experience

- Ratings were lowest for ‘the cost of car parking’, ‘accessibility’ (although amongst a low base size), ‘the availability of public transport’ and ‘the cleanliness of public toilets’.
- Although ‘value for money’ received relatively low proportion of ‘very satisfied’, visitors were generally satisfied with this area – only 15% reported being ‘not very satisfied’.

Figure 23. Satisfaction with different elements of the Wales visit experience, Percentage, Bottom 13, All 2022 Wales trip-takers



A16/17. How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <INSERT MONTH>?
 Base: All 2022 Wales trip-takers n=123. NA responses removed from all options to reflect the ratings of those for whom statements are relevant. Please note low base size for ‘accessibility for people with a disability’ n=31. All other base sizes n=60 and above



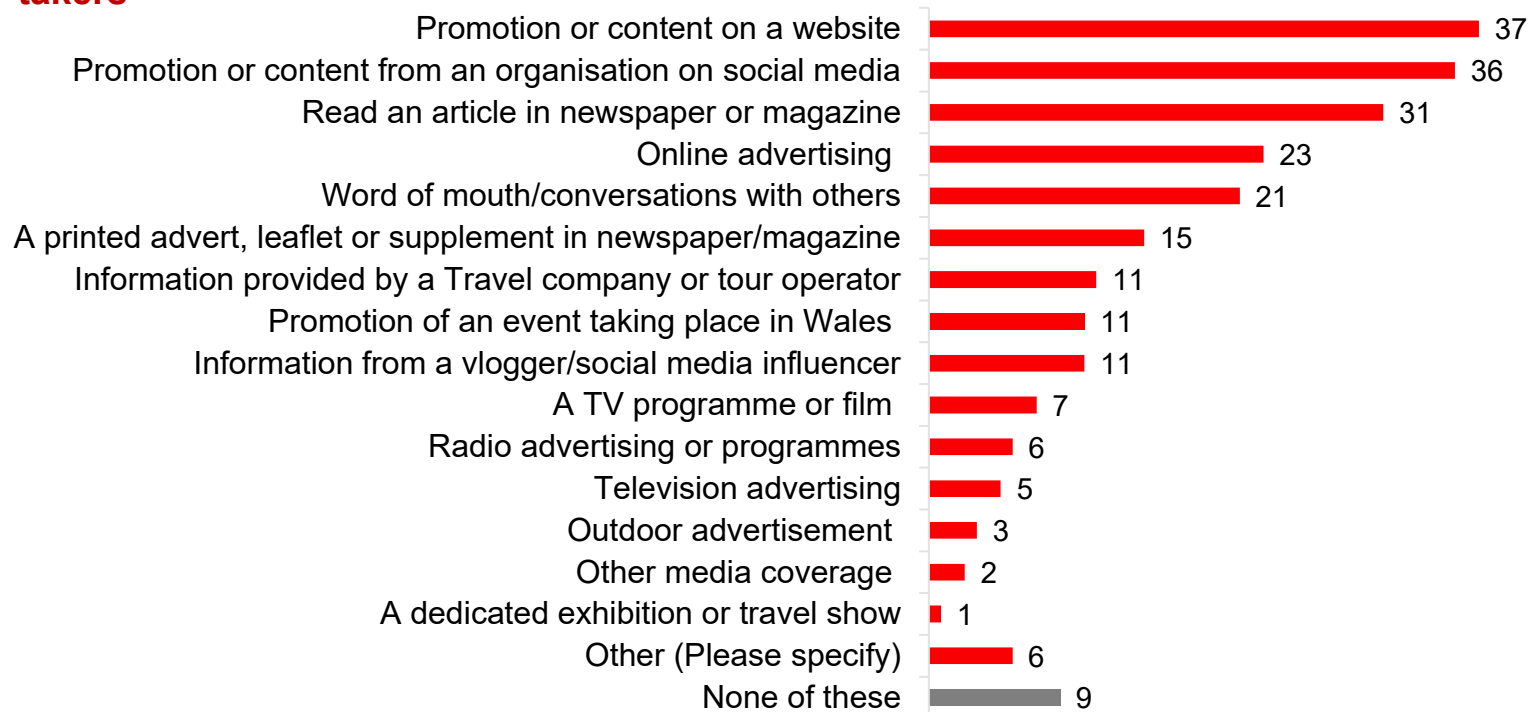
Marketing impact



Ways in which seen or heard about Wales in 2022

- Wales trip-takers were most likely to report having seen or heard about Wales through 'promotion or content on a website' in 2022 (37%), closely followed by 'promotion or content from an organisation on social media' (36%). Around 3 in 10 had seen or heard about Wales through 'an article in a newspaper or magazine' (31%). Wales trip-takers have also heard about Wales through a range of other sources – for example, 23% report having heard about Wales through 'online advertising', while just over 1 in 5 report having heard about Wales through 'word of mouth or conversations with others' (21%).

Figure 24. Engagement with Visit Wales marketing and communications, Percentage, All 2022 Wales trip-takers



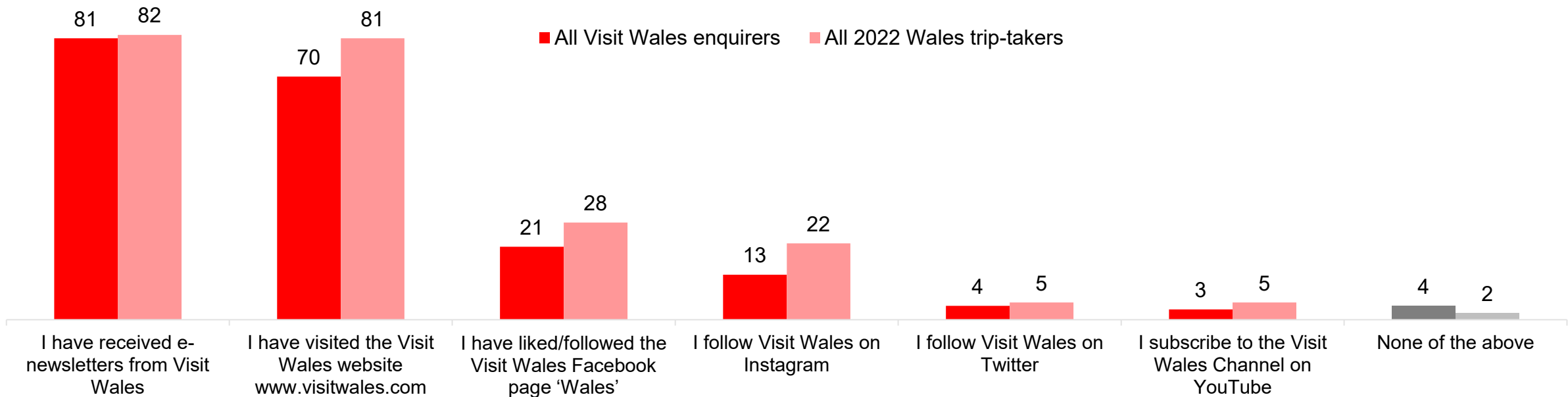
A18. Thinking about marketing and communications which, if any, of the following did you see or hear about Wales during 2022? Base: All 2022 Wales trip-takers n=123.



Engagement with Visit Wales marketing and communications

- Perhaps unsurprisingly given the method of recruitment for this research, Visit Wales e-newsletters was the channel of communication that enquirers were most likely to have engaged with in 2022, followed by the Visit Wales website.
- 3 in 10 of all enquirers and 2 in 5 Wales visitors engaged with at least one Visit Wales social media channel – Facebook and Instagram were the most commonly reported.
- Enquirers engage with multiple channels – the majority that have received e-newsletters also engaged with the Visit Wales website, and vice versa.

Figure 25. Engagement with Visit Wales marketing and communications, Percentage, All Enquirers



A19. Thinking about all the contact you had with Visit Wales in 2022, which of the following apply to you?

Base: All Visit Wales enquirers n=1,287; All 2022 Wales trip-takers n=123



Influence of Visit Wales communications on trip decision

- Just under 3 in 10 (29%) Wales visitors stated that Visit Wales communications were an influence (4-5 out of 5) on their decision to take their holiday or short break in Wales.
- By the end of 2021, around 3 in 5 (63%) Visit Wales trip-takers had already decided to take a holiday or short break in Wales in 2022. However, 1 in 3 (34%) were either considering Wales but had not made a final decision or were not considering visiting Wales in 2022, suggesting the influence of Visit Wales communications in driving a visit.

Figure 26. Influence of Visit Wales communications on trip decision, Percentage, All 2022 Wales trip-takers

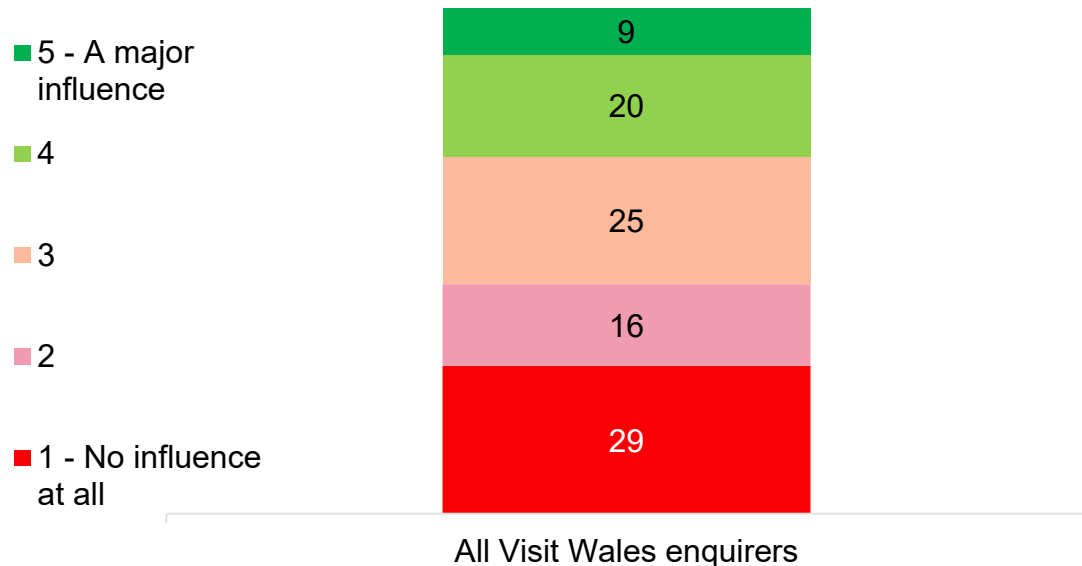
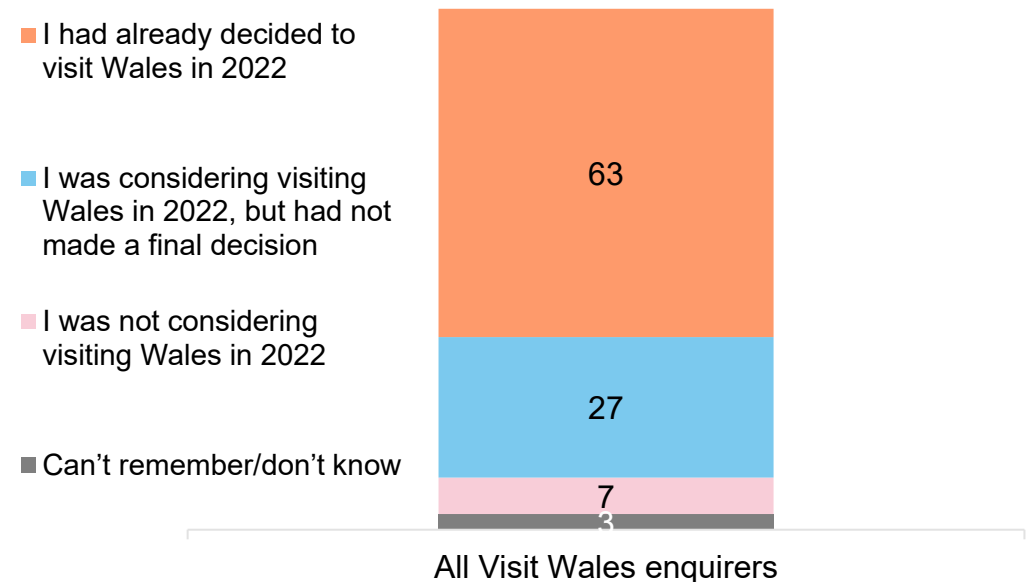


Figure 27. Mindset around visiting Wales at the end of 2021, Percentage, All 2022 Wales trip-takers



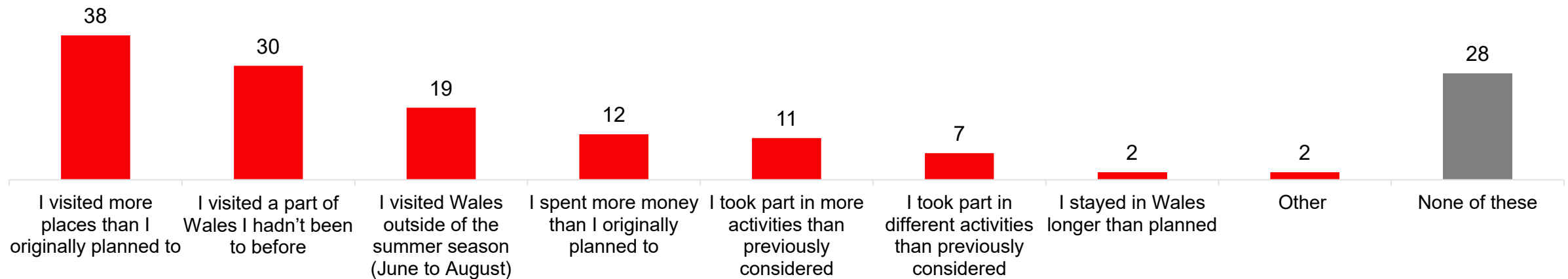
A22.What influence, if any, did the Visit Wales communications have on your decision to take your holiday or short break in [MONTH]? A24.Finally in this section, thinking back to the end of 2021, which of these statements best describes your plans at that time to visit Wales in 2022?

Base: All 2022 Wales trip-takers n=123.

Ways in which Visit Wales communications impacted trip

- 'I visited more places than I originally planned to' was the main way in which Visit Wales communications impacted Wales trips taken in 2022 (38%). This was followed by 'I visited a part of Wales I hadn't been to before' (30%) and 'I visited Wales outside of the summer season' (19%).
- Communications also influenced behaviour in other ways – albeit to a lesser extent. 12% spent more money than originally planned, 11% 'took part in more activities' and 7% 'took part in different activities'.

Figure 28. Engagement with Visit Wales marketing and communications, Percentage, All 2022 Wales trip-takers



A23. In which, if any, of these ways do you think Visit Wales communications impacted your trip in [MONTH] to Wales?

Base: All 2022 Wales trip-takers n=123



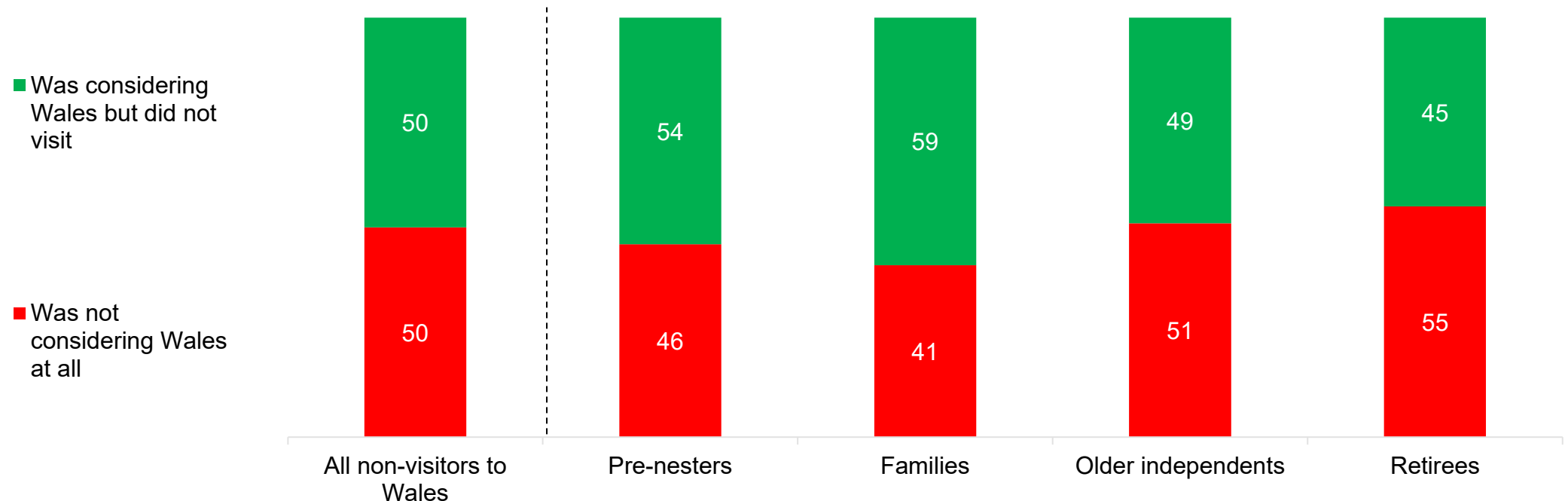
Reasons for not taking trips to Wales in 2022



Wales consideration amongst non-visitors to Wales

- Of the enquirers that did not visit Wales in 2022, half (50%) were considering going there, highest amongst families (59%) and lowest amongst retirees (45%).

Figure 29. Wales visiting intentions by non-visitors to Wales, Percentage, non-visitors to Wales, By life stage



B1. You mentioned that you did not take a holiday or short break in Wales during 2022. Were you considering a trip in Wales in 2022 at any stage?

Base: All 2022 non-visitors to Wales n=1,164; Pre-nesters n=81; Families n=153; Older Independents n=639; Retirees n=265.

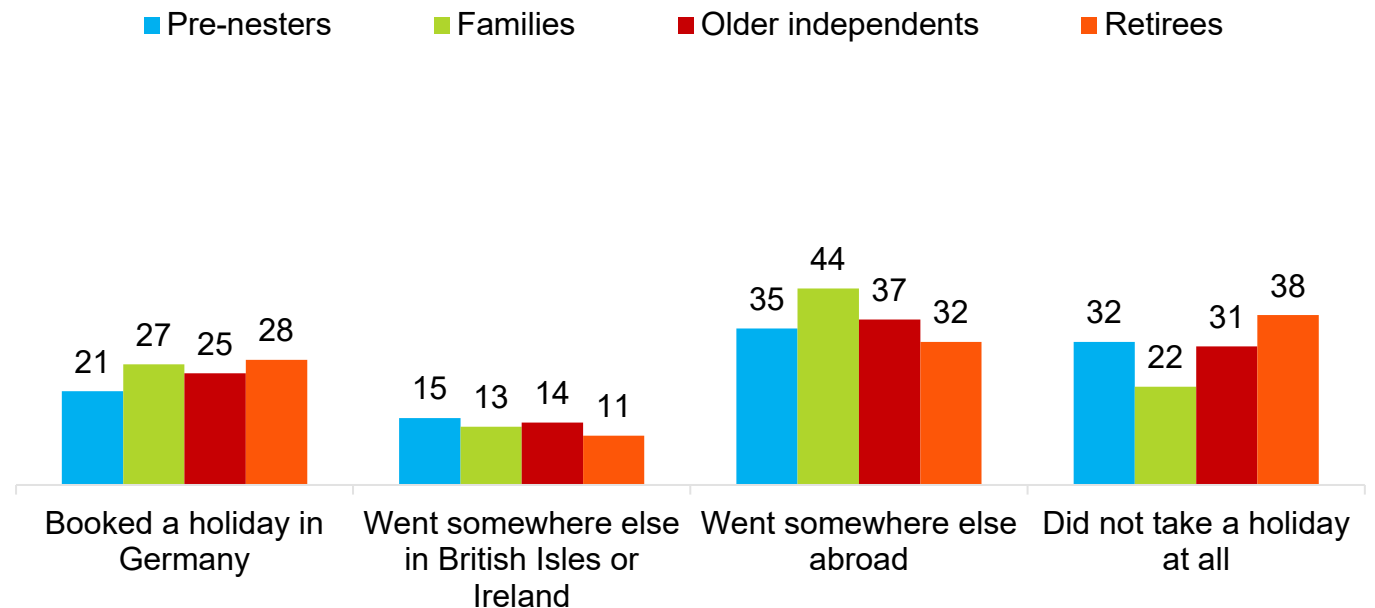
Destination consideration amongst non-visitors to Wales

- Over a third (36%) of non-visitors to Wales in 2022 ‘went somewhere else abroad instead’, highest amongst families. Around a quarter (26%) ‘booked a holiday in Germany’ and just under a third (32%) ‘did not take a holiday at all’.
- There were minimal differences by life stage, although ‘families’ were the most likely to have travelled ‘somewhere else abroad’, and the least likely to have ‘not taken a holiday at all’.

Figure 30. Other destination visiting intentions by non-visitors to Wales, Percentage, non-visitors to Wales



Figure 31. Other destination visiting intentions by non-visitors to Wales, Percentage, non-visitors to Wales, By life stage



B2. And did you go somewhere else for a holiday or did you not take a holiday at all?

Base: All 2022 non-visitors to Wales n=1,164; Pre-nesters n=81; Families n=153; Older Independents n=639; Retirees

n=265.



Destination consideration amongst non-visitors to Wales

- Of the non-visitors to Wales that went elsewhere in the British Isles, 'England' was the most visited alternative destination (60%), followed by Scotland (37%) and Ireland (22%)
- England was the most popular alternative destination amongst all types of enquirers. However, more e-CRM enquirers reported visiting an 'other place' in the British Isles and Ireland than Visit Wales website enquirers and lead generation enquirers.

Figure 32. Destination of those that went elsewhere in the British Isles, Percentage, non-Wales visitors

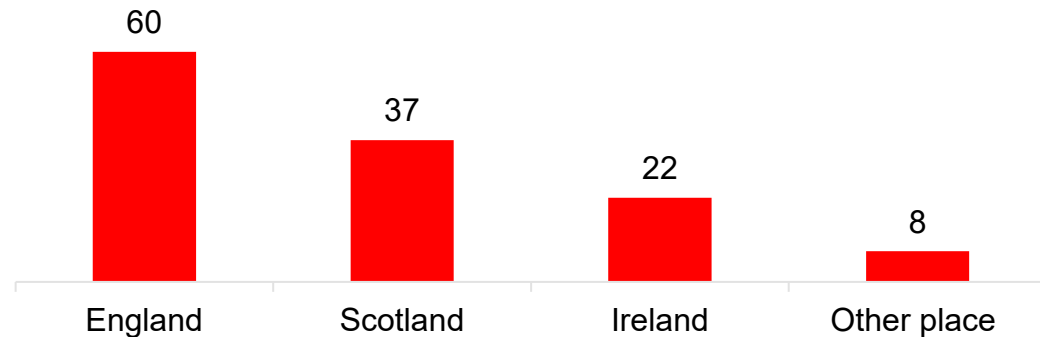
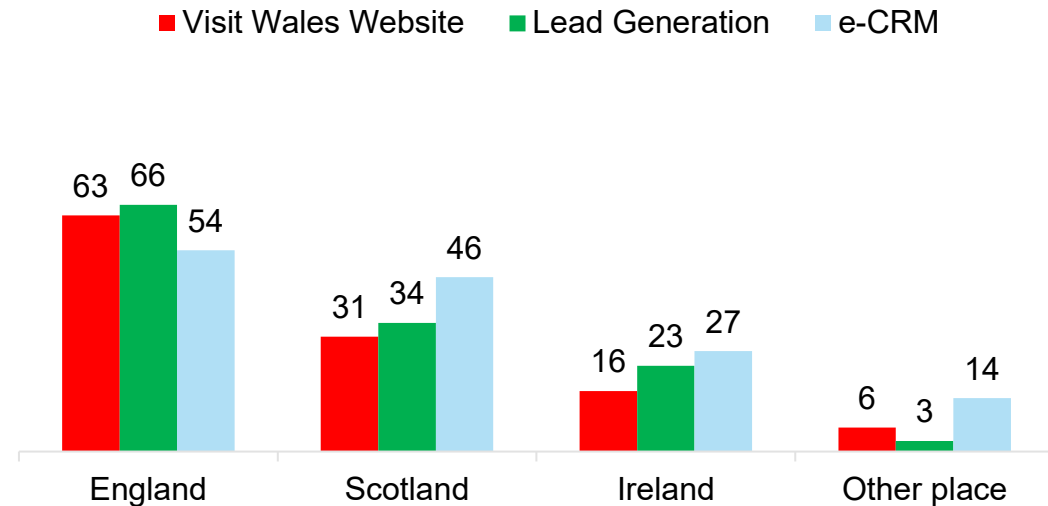


Figure 33. Destination of those that went elsewhere in the British Isles, Percentage, non-Wales visitors, by sample source



B3. And in which of the following areas of the British Isles and Ireland did you go?

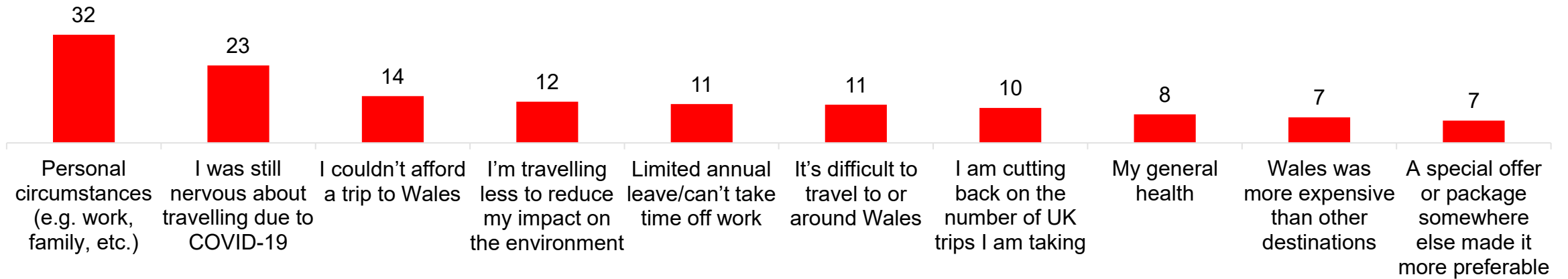
Base: All 2022 non-visitors to Wales that took a trip in the British Isles n=154; VW Website n=62; Lead generation

n=36; e-CRM n=56

Reasons for not visiting Wales in 2022

- ‘Personal circumstances’ was the most commonly cited reason for not visiting Wales in 2022, with just under a third (32%) of non-visitors giving this reason. Just under a quarter (23%) reported ‘still feeling nervous about travelling due to COVID’. ‘I couldn’t afford a trip to Wales’ and ‘I’m travelling less to reduce my impact on the environment’ were mentioned by 14% and 12% respectively.

Figure 34. Reason for not visiting Wales for overnight trip in 2022, Percentage Top 10 reasons, non-Wales visitors



B4. What are the reasons that you didn't visit Wales for a holiday or short break in 2022?

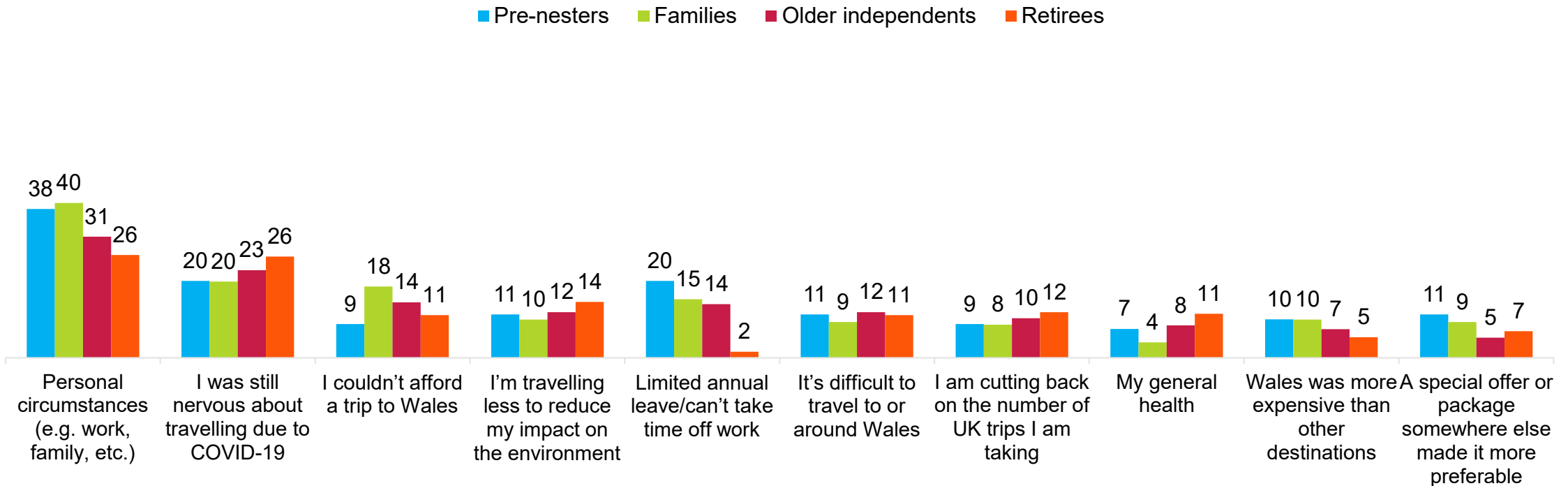
Base: All 2022 non-visitors to Wales n=1,164



Reasons for not visiting Wales in 2022

- ‘Personal circumstances’ was a leading reason for not visiting Wales in 2022 among all life stages, although more so for ‘pre-nesters’ and ‘families’. Retirees were the life stage most likely to cite nervousness around COVID-19, although this was the second most influential reason amongst other life stages too. Families were more likely than other life stages to report that they ‘couldn’t afford a trip to Wales’. ‘I’m travelling less to reduce my impact on the environment’ was consistently mentioned across life stages.

Figure 35. Reason for not visiting Wales for overnight trip in 2022 by life stage, Percentage Top 10 reasons, non-Wales visitors



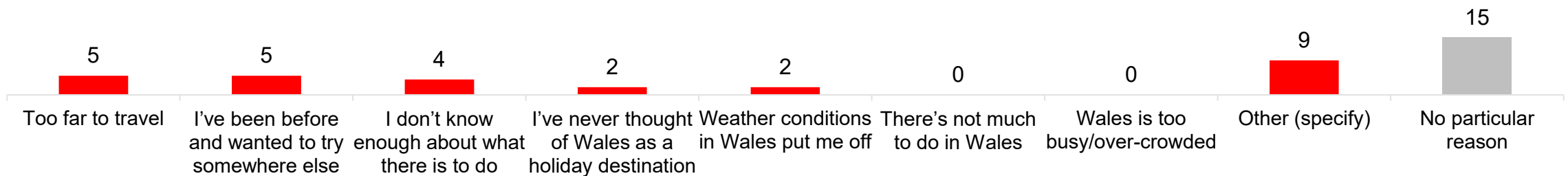
B4. What are the reasons that you didn't visit Wales for a holiday or short break in 2022?
 Base: All 2022 non-visitors to Wales n= 1,164
 Base: Pre-nesters n=90; Families n=168; Older Independents n=710; Retirees n=290.



Reasons for not visiting Wales in 2022

- A small number of German enquirers also cited other reasons for not visiting Wales, including 'too far to travel' (5%), 'I've been before and wanted to try somewhere else' (5%), and 'I don't know enough about what there is to do' (4%).

Figure 36. Reason for not visiting Wales for overnight trip in 2022, Percentage Bottom 8 reasons, non-Wales visitors



B4. What are the reasons that you didn't visit Wales for a holiday or short break in 2022?

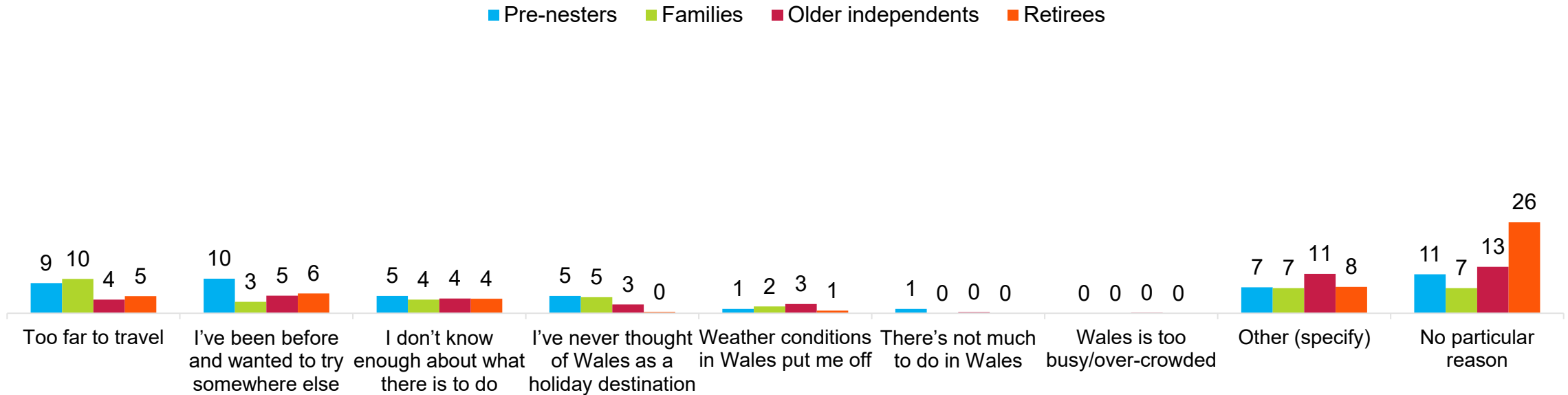
Base: All 2022 non-visitors to Wales n=1,164



Reasons for not visiting Wales in 2022

- Pre-nesters and families were most likely to report that Wales is 'too far to travel'. Pre-nesters were also most likely to state 'I've been before and wanted to try somewhere else'.

Figure 37. Reason for not visiting Wales for overnight trip in 2022 by life stage, Percentage Bottom 8 reasons, non-Wales visitors



B4. What are the reasons that you didn't visit Wales for a holiday or short break in 2022?

Base: Pre-nesters n=90; Families n=168; Older Independents n=710; Retirees n=290.



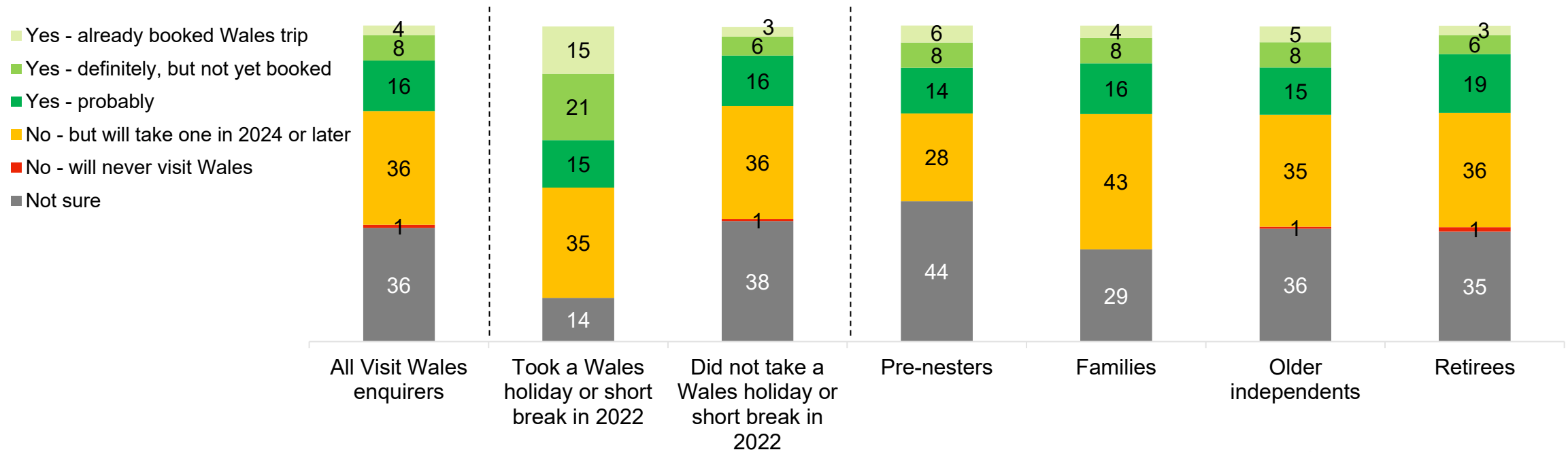
Intention to take a trip in Wales in 2023



Wales overnight trip intention in 2023

- 4% of Visit Wales enquirers have *already* booked a Wales trip in 2023, with a further 8% stating they will 'definitely' go but have not booked. A further 16% stated they are 'probably' going. Positively, over a third indicate that, although they won't visit Wales in 2023, they do intend to do so in 2024 or later.
- Over half (51%) of German enquirers who took a Wales trip in 2022 state they will also probably or definitely take a Wales overnight trip in 2023, as do 1 in 4 non-2022 trip-takers. There is minimal difference in Wales trip intention by life stage, although pre-nesters are the most likely to say they are 'unsure', suggesting there is potential to convert this audience to visits.

Figure 38. Wales visit intention, Percentage, All enquirers and by life stage



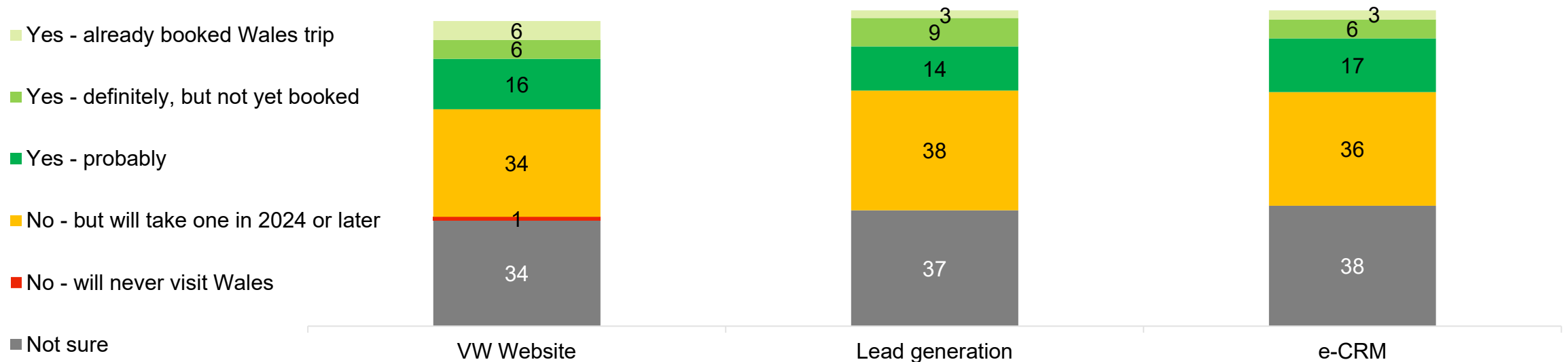
B5. Are you intending to visit Wales for a holiday or short break in 2023? B6. And when are you next likely to visit Wales for a holiday or short break? Base: All Visit Wales enquirers n=1,287; All non-visitors to Wales 2022 n=1,164; All 2022 Wales trip-takers n=123; Pre-nesters n=90; Families n=168; Older Independents n=710; Retirees n=290.



Wales overnight trip intention in 2023

- Intentions to take a holiday or short break in Wales in 2023 are very similar by channel of enquiry, around 1 in 4 having either 'already booked a trip' or 'definitely/probably' going.

Figure 39. Wales visit intention in 2023, Percentage, By sample source

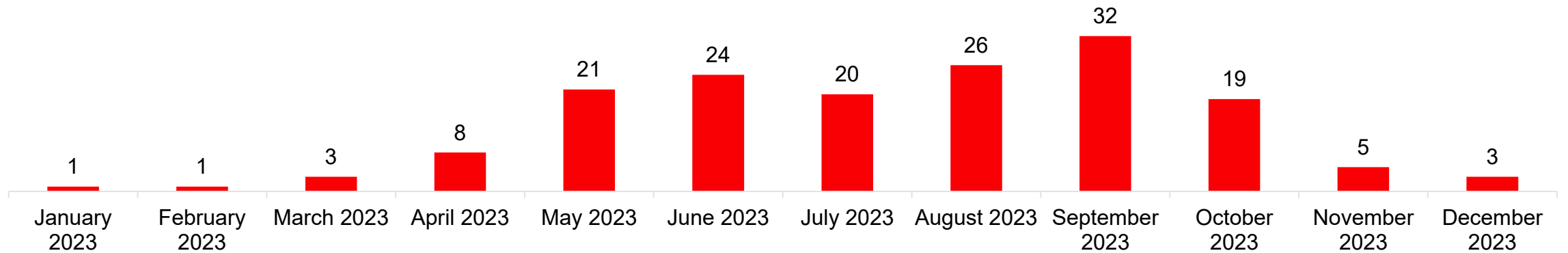


B5. Are you intending to visit Wales for a holiday or short break in 2023? B6. And when are you next likely to visit Wales for a holiday or short break? Base: All Visit Wales enquirers n=1,287; VW Website n=546; Lead generation n=319; e-CRM n=422

Month of intended Wales trip in 2023

- Wales 2022 enquirers are most likely to take their trip in September 2023, driven by older independents and retirees. August is also a popular month – driven by families – as are May, June, July and October.
- German enquirers show less interest in the off-peak months of January to April and November to December.

Figure 40. Month of intended Wales trip in 2023, Percentage, All 2023 Wales trip intenders



B7. When are you planning to take a holiday or short break in Wales in 2023?

Base: All 2023 Wales trip-intenders n=359



Anticipated destination for 2023 Wales trip

- The most popular Wales destination for a 2023 trip is South West Wales (43%), closely followed by South East Wales (including Cardiff) (41%) and North Wales (36%). 1 in 4 (26%) plan on visiting Mid-Wales.

Figure 41. Destination for intended Wales trip in 2023, Percentage, All 2023 Wales trip intenders



B8.Which of these areas do you plan on visiting on your next holiday or short break in Wales in 2023?

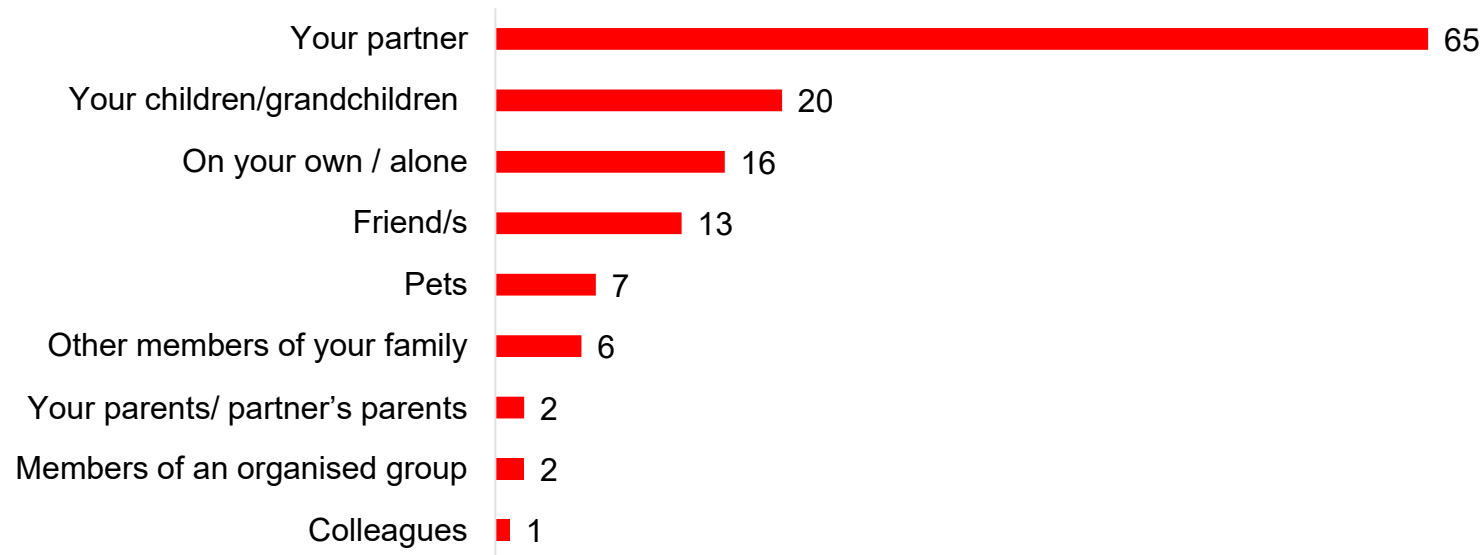
Base: All 2023 Wales trip-intenders n=359



Visitor party make-up for Wales trip in 2023

- Two thirds (65%) of 2023 trip intenders plan on visiting Wales in 2023 with their partner, with 1 in 5 expecting to do so with their children or grandchildren. 1 in 6 expect to travel to Wales on their own.
- Unsurprisingly, families are the most likely to plan on taking a Wales trip with children.

Figure 42. Visitor party make-up for Wales trip in 2023, Percentage, All 2023 Wales trip intenders



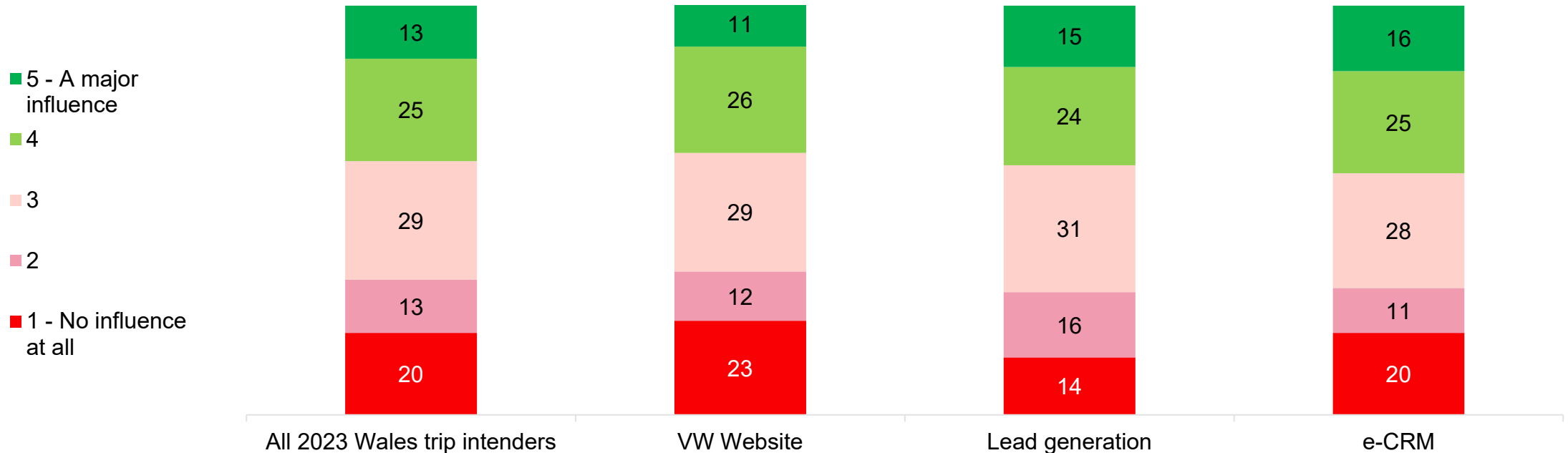
B9. Who, if anyone, is likely to accompany you on your next short break or holiday in Wales?

Base: All 2023 Wales trip-intenders n=359

Influence of Visit Wales communications on trip decision

- Around 2 in 5 (38%) Wales 2023 trip intenders indicate that Visit Wales communications have already had an influence on their decision to take their 2023 trip. There are minimal differences by sample source.

Figure 43. Influence of Visit Wales communications on trip decision, Percentage, All 2023 Wales trip intenders



B10. On a scale of 1 to 5 where 1 means 'no influence at all' and 5 means 'a major influence', what influence, if any, has Visit Wales communications had on your decision to take a holiday or short break in Wales in 2023? Base: All 2023 Wales trip-intenders n=359. VW Website n=171; Lead generation n=80; e-CRM n=108

Appendix
Statistical significance



Statistical significance

The table below outlines the statistical reliability of survey responses. The examples used are not exhaustive but have been selected to illustrate varying confidence at a range of different sample sizes.

Base	Survey finding of...		
	5 / 95%	20 / 80%	50 / 50%
Total Sample (1,287)	+/- 1.2%	+/- 2.2%	+/- 2.7%
Wales trip-takers in 2022 (123)	+/- 3.9%	+/- 7.1%	+/- 8.8%
Wales trip intenders for 2023 (359)	+/- 2.3%	+/- 4.1%	+/- 5.2%