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Visit Wales Tourism Market Demand Report – Germany May 2023

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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Available at: https://www.gov.wales/tourism-market-demand-reports-may-2023

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

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Contents (click title to jump to chapter)

Llywodraeth Cymru
Welsh Government

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 holiday destination. As part of this, each year Visit Wales conducts research amongst its priority markets. The research featured within this report covers the German Market and broadly looks at:

- The factors influencing holiday and short break choice
- Types of destination and experiences favoured on holidays and short breaks
- Associations with UK holiday destinations
- Wales as a destination
- Future visits to Wales
- Barriers to taking holidays or short breaks in the UK and reasons for not planning to visit Wales in the next few years
- Engagement with Visit Wales information channels and marketing
- The impact of the World Cup on perceptions of Wales
- Profiling and demographics

Methodology

Respondents were contacted though an online panel which could be completed via desktop or mobile device. To qualify for the survey, participants must belong to the **German holiday market (a term used throughout this report)**. We define this as:

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

Fieldwork took place from 9th May to 23rd May 2023.

There were 1,000 completed surveys. The first 300 responses to the survey were nationally representative of the German population by age, gender and region of residence. This allowed the researchers to understand the nationally representative breakdown of the German holiday market. The survey was then sampled and weighted by age, gender and region of residence in line with the nationally representative breakdown.

The survey took 20 minutes to complete on average.

Please note that in some instances percentages do not sum to 100%, and this is due to rounding.

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Definitions used within this report (1)

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

- **The German holiday market:** The total survey sample. Residents of Germany who are seriously considering a holiday or short break in the UK in the next few years
- **Wales trip intenders**: Members of the German holiday market who are definitely or probably intending to take a holiday or short break in Wales in the next few years.

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)

This report also includes reference to VisitBritain's global audience segments. These are based on research across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. There are five segments in total, defined as below:

- **Experience Seekers**: Free spirited and spontaneous, they like holidays full of action and excitement
- **Explorers**: They enjoy the outdoors, must see sites, and embracing local cultures at a more relaxed pace
- **Adventurers**: They live to go off the beaten track, spending time outdoors and trying out new experiences
- **Sightseers**: They prefer staying within their comfort zone, preferring cities to countryside, planning in advance
- **Culture Buffs**: Image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations

The question used to derive these is *"In this section, we are going to show you a series of paired statements. Simply select which of the two statements in each pair BEST describes you."* Respondents are then showed six paired statements.

Please note, whilst a similar survey was conducted amongst the German market in 2020, changes in the questionnaire, and a very different post-pandemic demographic profile mean this report does not make comparisons to the 2020 version. Indicatively, the current German market is considerably younger than the German market pre-pandemic.

Back to contents

Key Findings

Key findings (1)

German Holiday Market - Profile

1. This research identifies the German holiday market as those who are seriously considering taking a holiday or short break in the UK in the next few years.
2. Families make up 36% of the current market, with older independents also making up 36%. This is followed by Pre-Nesters (16%). Retirees are the smallest segment of the current market (13%), a departure from before the pandemic when they were considerably larger. Adventurers, Explorers and Experience Seekers, are the three largest segments in the German holiday market.
3. The distribution of the sample across regions of residence broadly replicates the distribution of German population across the regions of Germany.
4. Around 1 in 5 have some sort of existing ties to Wales - ‘having Welsh ancestry’ is the most common, followed by ‘I have friends or family living there’.
5. Over half of the Germany holiday market have either been ‘hit hard’ by the cost of living crisis so far, or ‘are ok but have to be careful’, suggesting that financial considerations are an important concern when planning trips to the UK

Trip Influences and Preferences – UK Holidays

1. The German holiday market is interested in a broad range of destination types. Urban destinations (‘cities and large towns’ and ‘historic and heritage towns’) make up the top two, but there is also strong interest in ‘wilderness and nature’, ‘scenic coastline and harbours’ and ‘scenic countryside and villages’.
2. Destination influences and experiences broadly replicate preferred destination types – ‘history, culture and heritage’ and ‘scenery, landscapes and outdoor activities’ all featuring strongly. However, further underlining the German market’s financial concerns, the leading influence for a UK trip is ‘great value for money’. Beyond these influences, the German market also show an interest in ‘trying local food and drink’ and ‘speciality shopping’.
3. Unsurprisingly, preferences differ somewhat by life stage. Preference for history and heritage is higher amongst older independents and retirees, whilst pre-nesters and families show a stronger preference for adventure, creative or artistic pursuits, and health or wellbeing activities. All life stages show an interest in visiting large cities and towns and walking/hiking.

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Key findings (2)

Destination relationships and previous visits

1. The German market have some familiarity with Wales – around a third report that they know what there is to see and experience on a holiday there ‘very’ or ‘fairly well’. However, familiarity with Wales is lower than Scotland, Ireland, the Rest of England outside of London, and London.
2. Similarly, Wales is the destination least likely to be visited at any point in the past and in recent years.
3. Familiarity correlates strongly with previous visits, suggesting increasing familiarity with Wales may drive visits in the future.
4. Positively, around 2 in 5 (41%) of the German market state they have never been to Wales but would like to, although this is also the case for Scotland (43%) and Ireland (41%), two regions with higher levels of previous visitation.
5. Families have the strongest reported familiarity with Wales as a destination and are more likely to report having visited Wales recently, compared to other life stages. Notably however, older independents and retirees report relatively strong visits to Wales between 2016 and 2019, suggesting that older life stages may have curtailed their visits since 2019.

Destination associations and preferences

1. Relative to the destination types the German market like to visit, Wales has strong associations with ‘historic and heritage towns’, ‘wilderness and nature’, and ‘scenic countryside and villages’. It has weaker associations with ‘cities and large towns’, ‘scenic coastline and harbours’, ‘touring holidays’ and ‘traditional seaside resorts’. Given that Wales has a relatively strong offer in most of these areas (perhaps with the exception of ‘cities and large towns’), these findings suggest there is an opportunity for Wales to improve its appeal amongst the German market.
2. In terms of destination influences and experiences important to the German market, 'accommodation with charm and character' and 'great places to explore off the beaten track’ are important to the German market, while also being influences that Wales has strong associations with. It has less strong associations with being a place that is ‘easy to travel to and get around’.

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Key findings (3)

3. Despite some positive associations against areas of importance to the German market, Wales typically has the weakest associations compared to other destinations tested within this research. Scotland, Ireland and the Rest of England generally have stronger associations when it comes to rural destination types, and all other tested destinations tend to score higher in relation to history and heritage. In the majority of areas, the gaps in associations are relatively small between destinations. However, in some cases, other destinations have considerably stronger associations, compared to Wales. For example, despite only a small difference in familiarity, Scotland has considerably stronger associations than Wales as somewhere with 'incredible scenery and landscapes' and as somewhere for 'hiking, walking or rambling'.
4. The importance of Wales' natural beauty to the German market is perhaps best underlined when participants were asked to state what they think is appealing about Wales as a holiday or short break destination – 'landscape', 'nature', 'mountains' and 'the coast' were most commonly mentioned. 'Culture' and 'castles' were also mentioned, highlighting the potential value of Wales' history and heritage in attracting this market.

Trip Intentions – UK Holidays

1. 2 in 5 of the German holiday market are *very* likely to visit the UK in the next few years, the remainder just 'fairly likely'.
2. Pre-nesters and families are considerably more likely to say they are 'very likely' to take a holiday or short break in the UK and to be intending to visit this year in 2023. Older independents and retirees show greater uncertainty over when they will next visit the UK.
3. Experience Seekers and Cultural Buffs are the segments most likely to say that they are very likely to take a UK holiday in the next few years (and in 2023) – other segments show a similar propensity to take a trip to the UK.
4. The likelihood of visiting the UK is consistent across German regions.
5. The most commonly reported barriers to taking a UK holiday/short break are 'Brexit has made travel to the UK more difficult', 'personal circumstances, 'it is too expensive in the UK' and 'UK weather is too unreliable'.
6. Over half of the Germany holiday market have either been 'hit hard' by the cost of living crisis so far, or 'are ok but have to be careful'.
7. Frictionless travel and value for money will be priorities to reassure the potential visitors to the UK from the German market.

Key findings (4)

Future trips to Wales

1. 7% of the German market state they have already booked a holiday or short break in Wales in the next few years, with just over a quarter 'very interested – but have not yet booked'. 16% of those interested in taking a Wales trip state they are planning on doing so in 2023, but the majority are planning their trip from 2024 onwards.
2. Families are the life stage most interested likely to be very interested in a trip to Wales, while Experience Seekers are the segment most likely to be very interested.
3. Anticipated overnight visits to Wales from the German market are at their highest between June and August, with relatively equal intention across each of these months. Off-peak trips to Wales are of limited interest to the German market.
4. Half of anticipated overnight trips to Wales are stays of 4-7 nights, although around 3 in 10 anticipate a longer break of 8+ nights.
5. German visitors to Wales will predominantly be staying in more than one place – half would stay overnight in more than one place in Wales, and 3 in 5 would stay elsewhere in the UK – London and Scotland are the leading additional destinations
6. Aligned with preferences and associations, the most popular destination types for a trip to Wales are 'historic or heritage town', 'scenic countryside or village', 'wilderness and nature' and 'scenic coastline or harbours'. Also aligned with associations, 'cities or large towns' - the most popular destination type amongst the German market - is relatively low down the list of planned destination types for a trip in Wales.

4. Intended activities replicate general preferences amongst the German market with 'history and heritage', 'nature and wildlife experiences' and 'trying local food and drink' all dominant.
5. 'Hotels or motels' is the most popular types of accommodation amongst future German trip takers to Wales, followed by 'guest house/B&B' and a range of other accommodation types, including 'serviced apartment' (24%), 'rented flat/apartment' (21%) and 'hostel' (20%).
6. There is strong interest in visiting festivals/events in Wales amongst German intenders, with a 'food and drink festival', 'live music festival' and 'cultural/literary/arts festival' of most interest.

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Key findings (5)

Wales trip booking and information influences

1. Wales intenders are likely to use a range of sources to plan their next trip/s – printed travel guide books/brochures and conversations with friends and family are the leading influences.
2. Nearly 2 in 5 Wales trip intenders will book some, but not all elements of their trip together – this is driven largely by families. Only 1 in 5 will book most or all elements as one package and this is driven by retirees.
3. When booking trips to Wales, the German market are most likely to book them via an 'online only travel agent or tour operator' and a 'price comparison site', although neither of these dominate, with a range of other potential options also indicated.
4. Trips are likely to be booked relatively close to the date of travel - 1 in 3 will book within 1 month of the travel date, and a further 1 in 4 just 1 to 3 months beforehand. Only 3 in 10 would expect to book the trip more than 3 months in advance of the trip. The last-minute nature of trip-booking underlines the need for destinations to remain at the forefront of consumers' minds.

Non-intenders to Wales

1. Low familiarity with Wales is linked to intention to visit Wales - 'I don't know enough about what there is to do' (26%) and 'I've never thought of Wales as a destination' (24%), two of the leading barriers to visiting. This suggests that further promoting Wales to this market could lead to greater interest in visiting.
2. Aligned with 'value for money' being a strong influence on trip choice, financial concerns are impacting Wales trips - 'a special offer or package somewhere else makes it more preferable' and 'I can't afford a trip to Wales' are also in the top five barriers to visiting.
3. Of the people not intending to visit Wales in the next few years, London is the most popular alternative, but there is also strong interest in Ireland, Scotland and the Rest of England. Positively, a small proportion (14%) of non-visitors are likely to combine their visit to these areas with a day trip to Wales.

Key findings (6)

Marketing Impact

1. Just over a third of the German holiday market ‘definitely’ or ‘possibly’ recall seeing promotions or marketing about Wales in the last year or so, higher among families.
2. Of the German holiday market who have ‘definitely’ or ‘possibly’ seen promotions or marketing about Wales in the last year or so, they are most likely to recall seeing ‘promotion or content on social media’, ‘television advertising’ and ‘online advertising’.

Promotion and awareness of Wales from Football World Cup

1. Around a quarter of the German holiday market watched a Wales football match and a third saw some form of media coverage about Wales during the Men’s Football World Cup.
2. The vast majority of these engaged with Wales at some level – watching one of the Wales football matches, talking about Wales with other people and searching for information about Wales online, the most popular ways of doing so.

Sustainability

1. The majority of the German holiday market are concerned about ‘sustainability issues’, and most conduct some sustainable actions – reducing energy usage at home, avoiding too much packaging and recycling are the main ways they look to make a difference.
2. Around 3 in 10 fall into the sustainability segments ‘Eco Evangelists’ and ‘Good Intentions’ – two segments that are the most passionate about the environment and would expect holiday companies to appeal in this area. Nearly half belong to ‘Green Signalling Hedonists’, who prioritise experiences, but respond well to sustainable messaging. Together, the dominance of these segments suggests that promoting sustainability will be well received by the German market. 3 in 4 agree with the statement that large companies ought to do more far more to help the environment.
3. Wales may also benefit from its proximity to Germany – relative to more medium or long haul destinations – with 1 in 4 saying they are flying shorter distances in an effort to be more sustainable.

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Welsh Government

Demographics of the German Holiday Market

Gender and life stage of the German holiday market

- The gender split of the German holiday market is slightly skewed towards females (57%). Families and older independents are the largest life stages, both making up 36% each. Retirees are the smallest life-stage, making up just 13%, with pre-nesters making up 16%.
- In comparison to before the pandemic, the German market is younger, with a considerably lower proportion of retirees currently planning a UK trip.

Figure 1. Gender of respondents, Percentage, All respondents

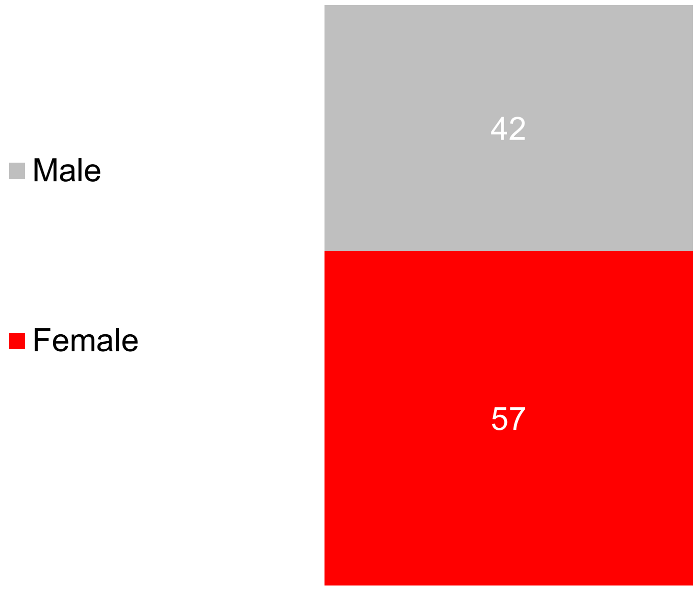
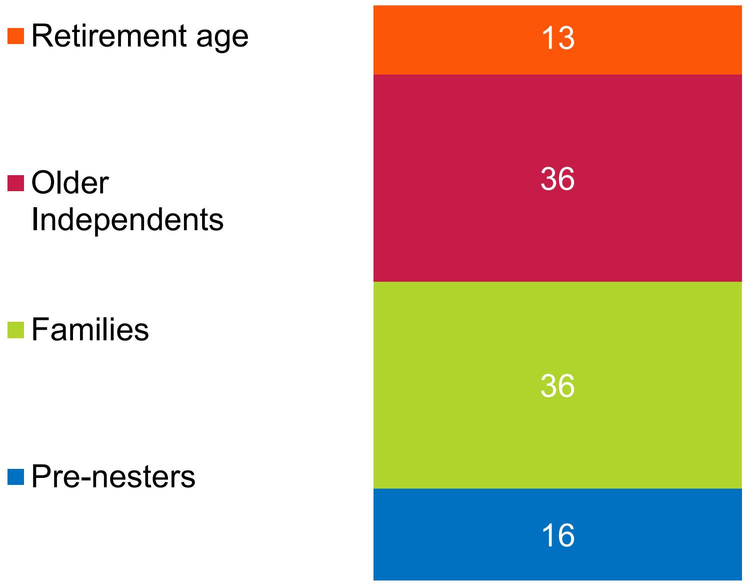


Figure 2. Life stage of respondents, Percentage, All respondents



Demographics questions. All data weighted.
Base: All respondents n=1,000

Relationship with Wales and VisitBritain segments

- Around 1 in 5 (21%) have some sort of existing ties to Wales - ‘having Welsh ancestry’ is the most common (11% falling into this category), followed by ‘I have friends or family living there’ (9%).
- Adventurers (26%), Explorers (23%) and Experience Seekers (22%) are the three largest segments in the German holiday market.

Figure 3. Relationship with Wales, Percentage, All respondents

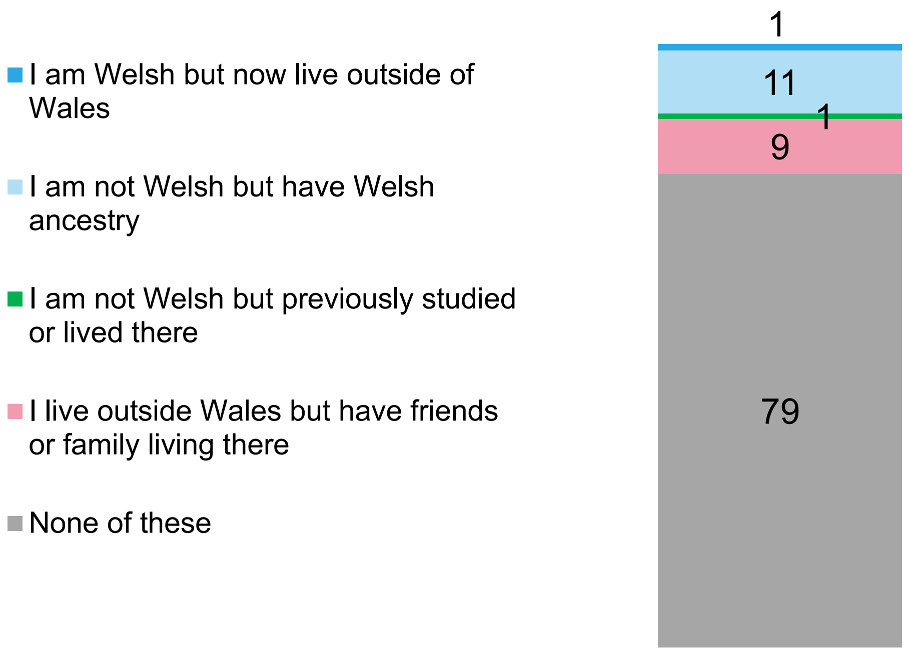
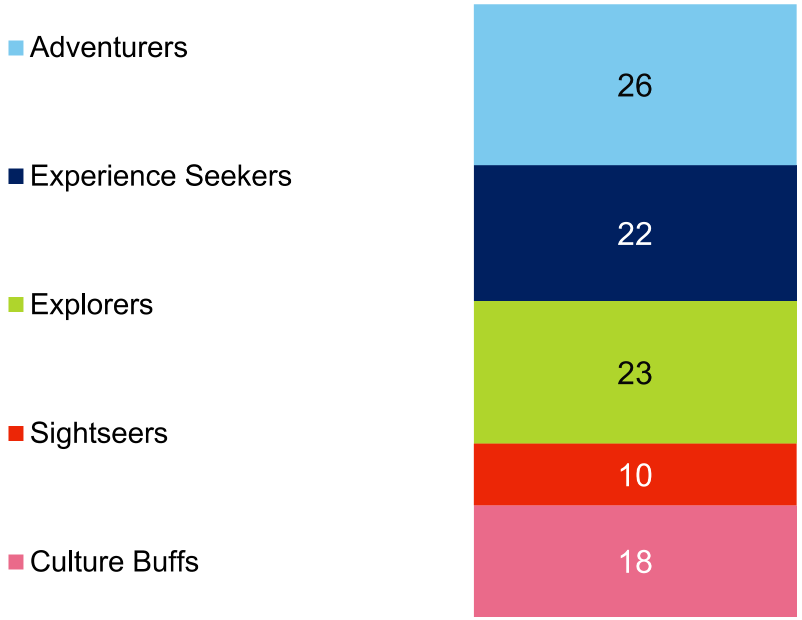


Figure 4. VisitBritain Segment of respondents, Percentage, All respondents

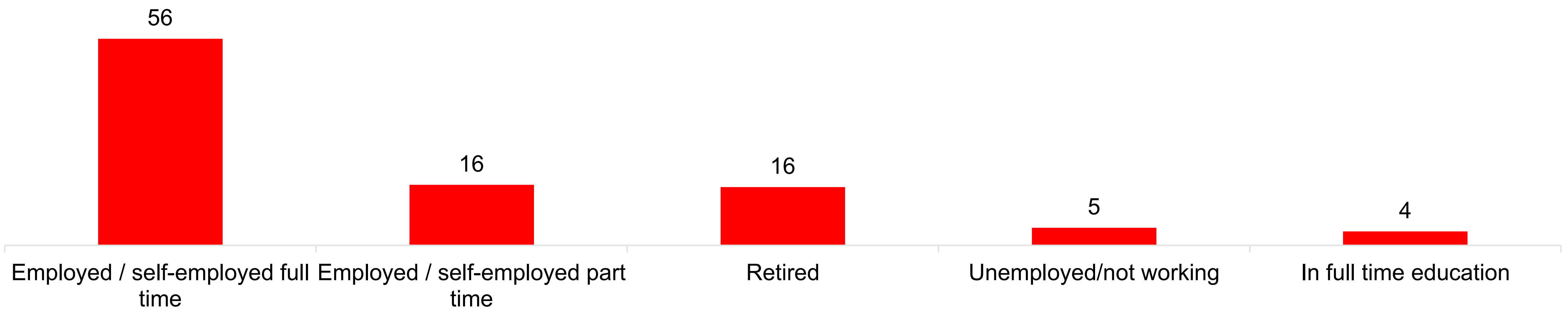


X9. Which, if any, of the following apply to you? All data weighted. For segment questions see introduction.
Base: All respondents n=1,000

Employment status of the German holiday market

- Just over half (56%) of the German holiday market is in full-time employment, with 1 in 6 (16%) working part time and retired.

Figure 5. Employment status of respondents, Percentage, All respondents

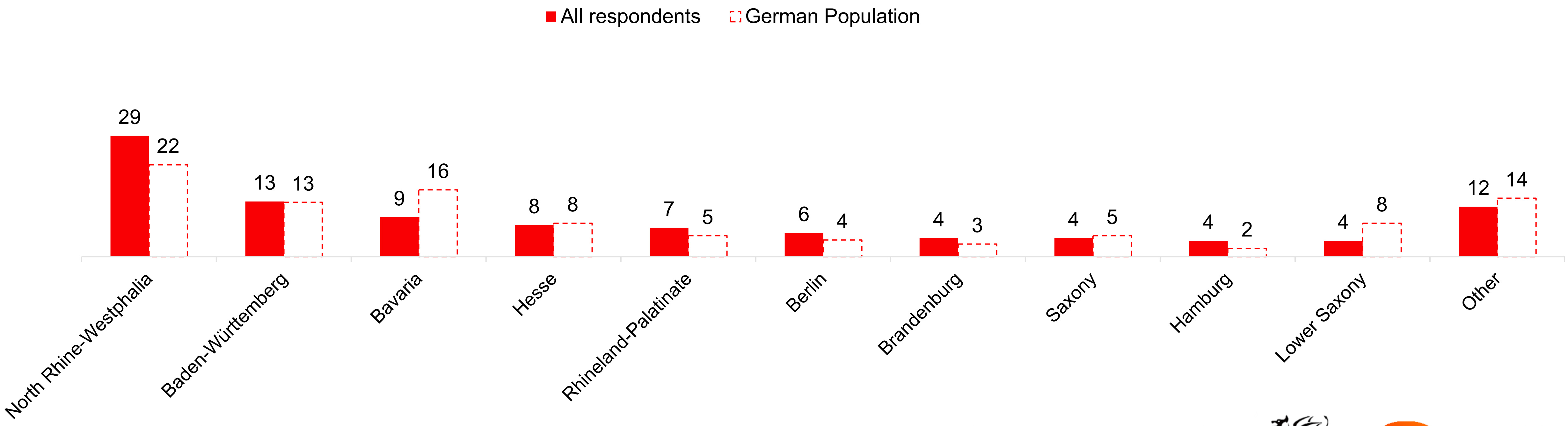


X3a.Which of these best describe you? All data weighted.
Base: All respondents n=1,000

Region of residence of the German holiday market

- The region of residence of the Germany holiday market which has the highest representation is North Rhine-Westphalia (29%) – the most populated German region - followed by Baden-Württemberg (13%) and then Bavaria (9%). Generally the distribution of respondents replicates the population, with the exception of North Rhine-Westphalia (over-indexing amongst respondents) and Bavaria (under-indexing amongst respondents).

Figure 6. Origin of respondents, Percentage Top 10 + other, All respondents

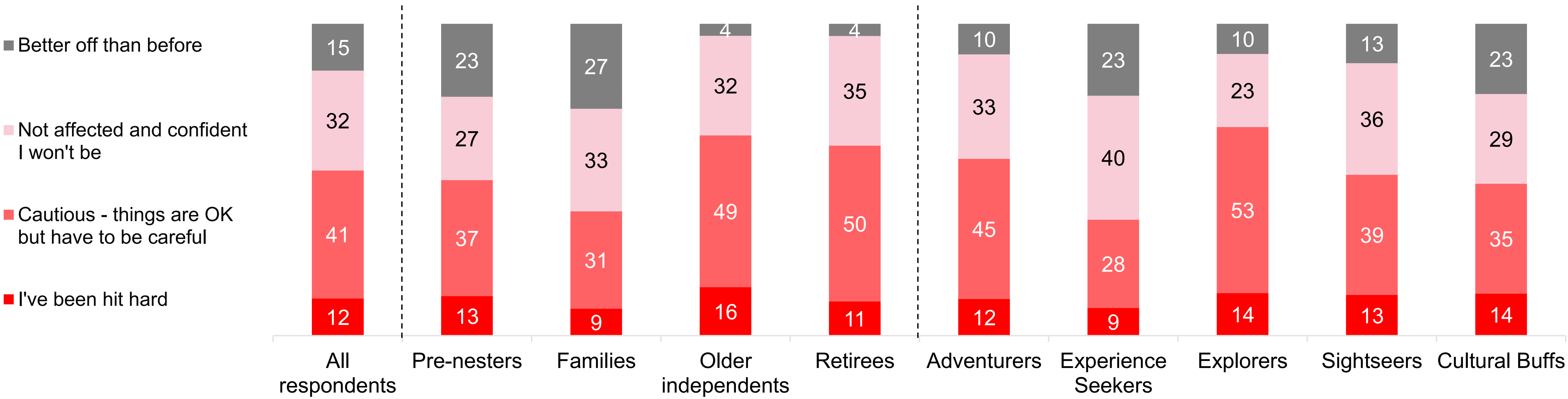


Demographics questions. S3. Where in Germany do you live? All data weighted. Base: All respondents n= 1,000 German population is sourced from Statista data 2021 https://www.statista.com/statistics/1127686/population-by-federal-state-germany/

Attitude to 'cost of living crisis' of the German holiday market

- Over half (53%) of the Germany holiday market have either been 'hit hard' by the cost of living crisis so far, or 'are ok but have to be careful' – the latter making up the largest proportion. Around a third (32%) believe they will not be affected, and 15% say they are better off than before the crisis.
- Pre-nesters and families are the most likely to state they are 'better off' with older independents and retirees more likely to be being 'cautious'. Amongst VisitBritain segments, 'Experience Seekers' and 'Cultural Buffs' are most likely to be 'better off than before', while 'Explorers' and 'Sightseers' are more likely to be 'cautious'.

Figure 7. Impact of cost of living crisis so far, Percentage, All respondents



X4c. There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? All data weighted.
 Base: All respondents n=1,000; Adventurers n=264; Experience Seekers n=214; Explorers n=232; Sightseers n=105; Cultural Buffs n=185; Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

Llywodraeth Cymru Welsh Government

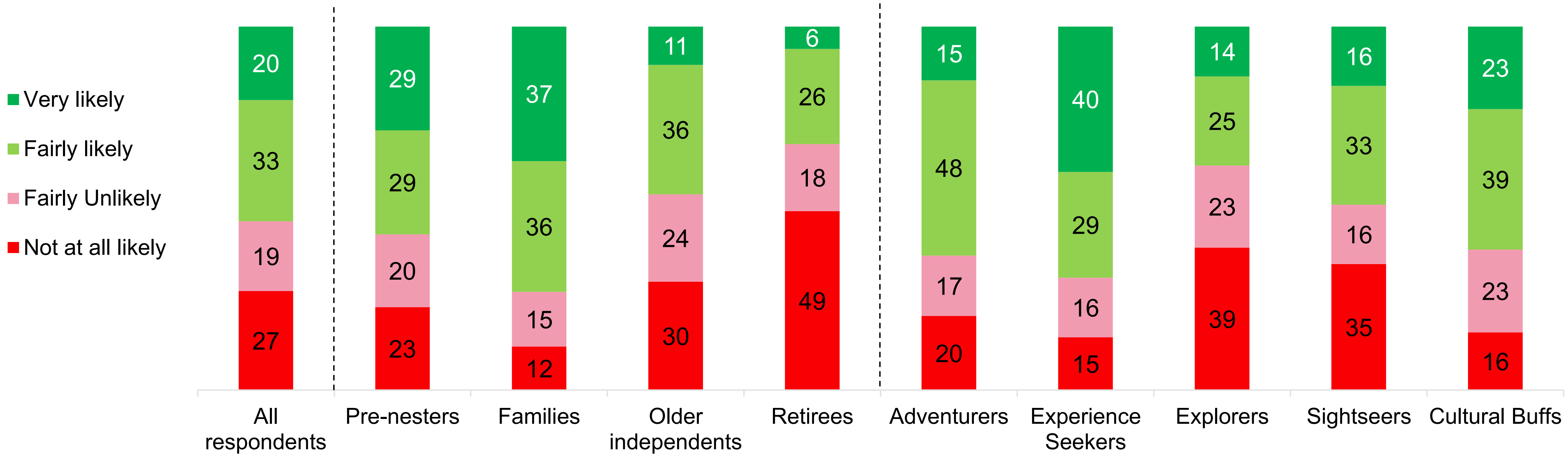
Back to contents

Trip intention and barriers

UK holiday/short break intention in the next few years – population

- 1 in 5 (20%) of the German population are 'very likely' to take a UK holiday/short break in the next few years.
- Pre-nesters and families are considerably more likely than older independents or retirees to say they are 'very likely' to take a holiday or short break in the UK in the next few years.
- Experience Seekers and Cultural Buffs are more likely to take a holiday or short break in the UK in the next few years.

Figure 8. Likelihood of taking a UK holiday or short break in the next few years, Percentage, All population



S6. How likely or unlikely are you to take a holiday or short break in the UK in the next few years?
Base: All national representative respondents n=304; Pre-nesters n=35*; Families n=100; Older Independents n=104; Retirees n=65; Adventurers n=54; Experience Seekers n=55; Explorers n=102; Sightseers n=49*; Cultural Buffs n=44*
*Caution: Low base sizes – treat indicatively
Note: These results are based on a smaller nationally representative sub-set of the population, meaning base sizes are lower.

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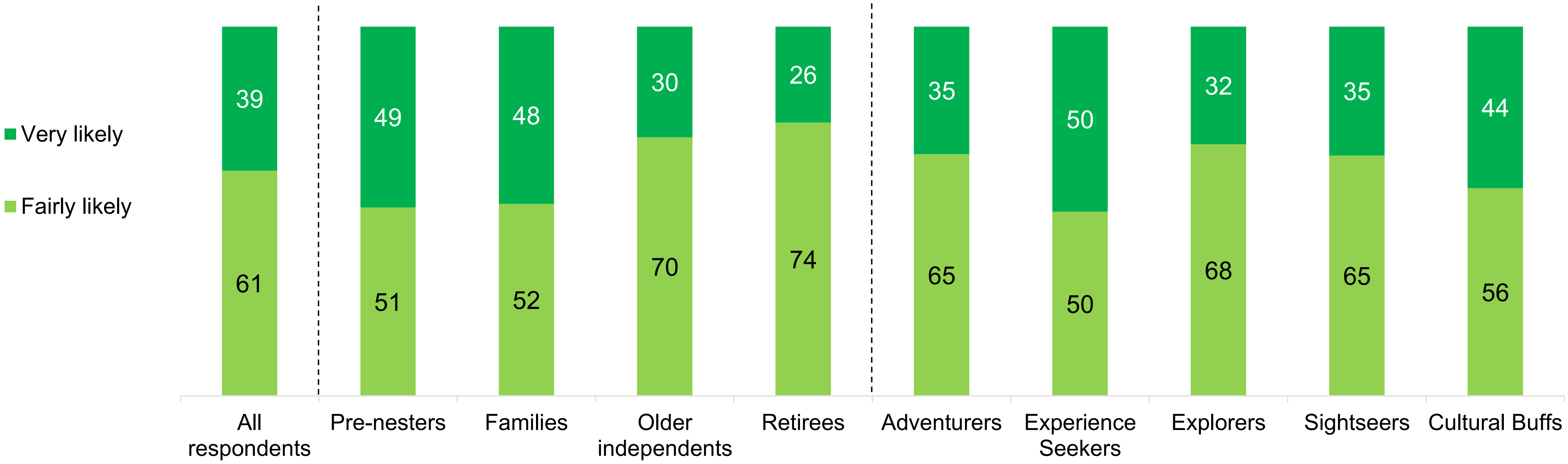
UK holiday/short break intention in the next few years – holiday market

- Just under 2 in 5 (39%) of the German holiday market are 'very likely' to take a UK holiday/short break in the next few years.
- Pre-nesters and families are considerably more likely than older independents or retirees to say they are 'very likely' to take a holiday or short break in the UK in the next few years.
- Experience Seekers and Cultural Buffs are more likely to take a holiday or short break in the UK in the next few years.

Figure 9. Likelihood of taking a UK holiday or short break in the next few years, Percentage, All respondents

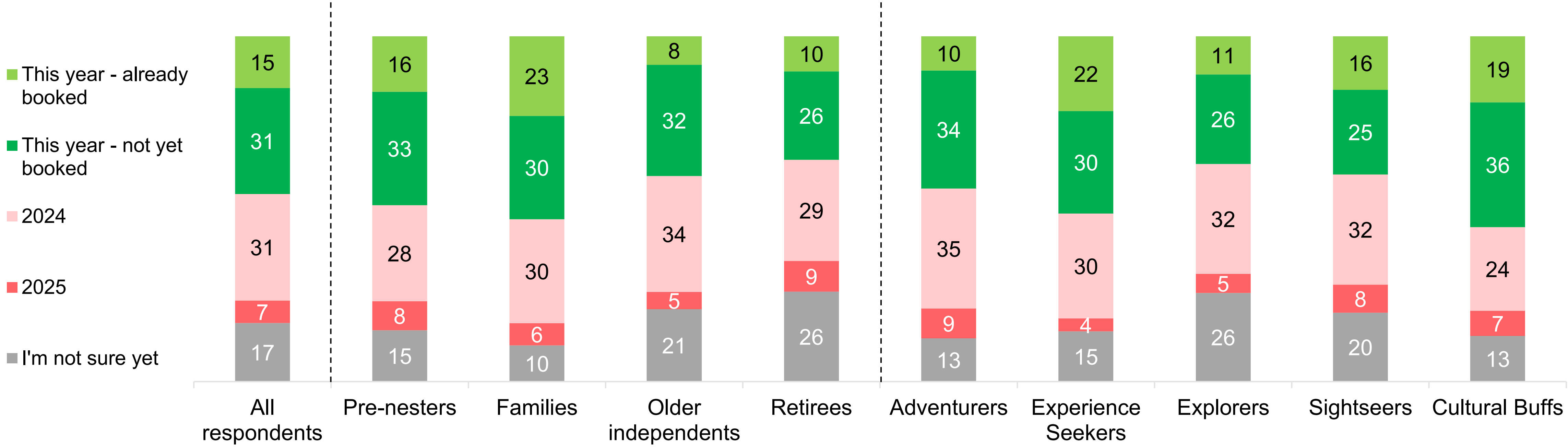


S6. How likely or unlikely are you to take a holiday or short break in the UK in the next few years?
Base: All respondents n=1,000 ; Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126; Adventurers n=264; Experience Seekers n=214; Explorers n=232; Sightseers n=105; Cultural Buffs n=185

UK holiday/short break intention in the next few years

- Nearly half (46%) of the German market plan on taking their next UK trip this year, with 15% having ‘already booked’, and 31% not yet having booked. Families are the most likely to have already booked a 2023 trip to the UK, followed by pre-nesters. This aligns with both groups having been more likely to report that they were very likely to take a holiday or short break in the UK in the next few years. Retirees exhibit the highest uncertainty about whether they will take a UK trip, with just over 1 in 4 reporting that they are ‘not sure yet’. Aligned with likelihood to travel to the UK, Experience Seekers and Cultural Buffs are the most likely to take an overnight UK trip this year (at 52% and 55% respectively), compared to other segments. Explorers are the least likely to take a trip in 2023 and the most likely to be ‘unsure’.

Figure 10. When planning to take a UK trip in the next few years, Percentage, All respondents



S7. In which year are you likely to take your next holiday or short break in the UK? All data weighted.
Base: All respondents n=1,000; Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126; Adventurers n=264; Experience Seekers n=214; Explorers n=232; Sightseers n=105; Cultural Buffs n=185

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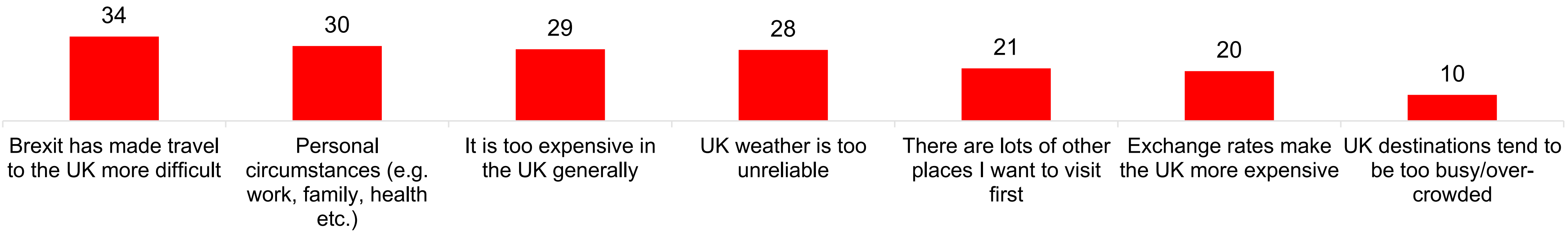
Barriers to taking a UK overnight trip

- The most commonly cited barrier to taking a UK holiday or short break in the next few years amongst the German market is ‘Brexit having made travel to the UK more difficult’ (34%).
- Around 3 in 10 people state ‘personal circumstances’ (30%), ‘it is too expensive in the UK generally’ (29%) and ‘UK weather is too unreliable’ (28%) as barriers to taking a holiday or short break to the UK in the next few years.

Figure 11. Barriers to take a UK holiday/short break in next few years, Percentage, Top 7, All respondents



S9. Which, if any, of these are barriers to people like you taking a short break or holiday in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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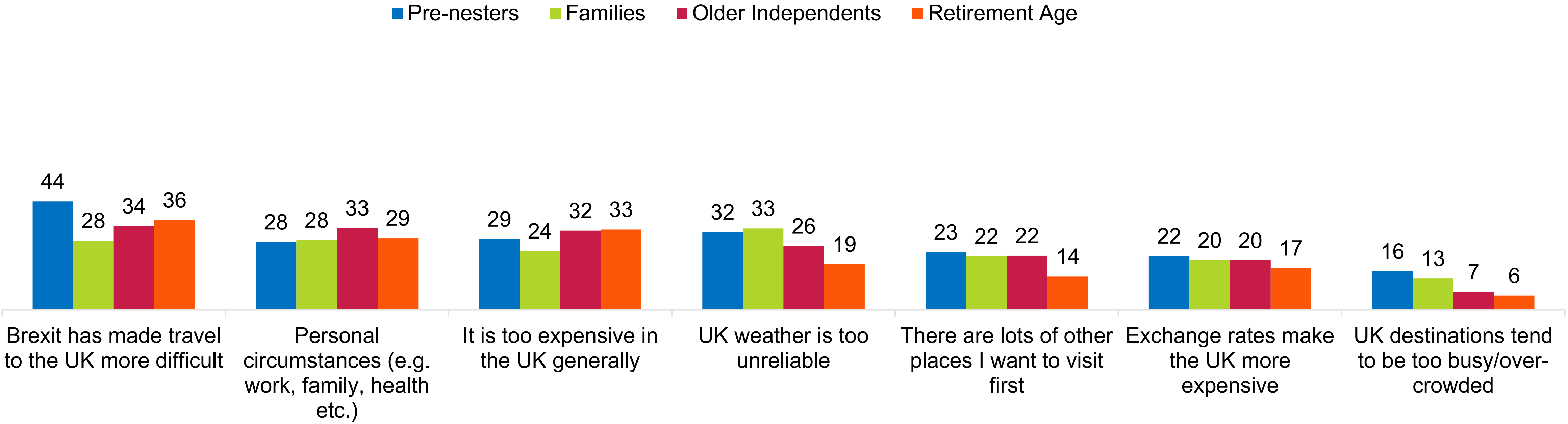
Barriers to taking a UK overnight trip by life stage

- Pre-nesters are more likely to report that 'Brexit has made travel to the UK more difficult', compared to other life stages. Families and pre-nesters are more likely to state weather is a barrier.
- Older independents are more likely to cite 'personal circumstances' as a barrier. Aligned with cost-of-living concerns, older independents and retirees index higher on the UK being 'too expensive'.

Figure 12. Barriers to take a UK holiday/short break in next few years by life stage, Percentage, Top 7, All respondents



S9. Which, if any, of these are barriers to people like you taking a short break or holiday in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

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Barriers to taking a UK overnight trip

- Barriers such as ‘it is difficult to travel around the UK’ and ‘the UK isn’t a welcoming destination’ are the least likely to be cited amongst the German market suggesting barriers around Brexit relate more to travelling to the UK as opposed to travelling around it, or the level of welcome when there.

Figure 13. Barriers to take a UK holiday/short break in next few years, Percentage, Bottom 7, All respondents

S9. Which, if any, of these are barriers to people like you taking a short break or holiday in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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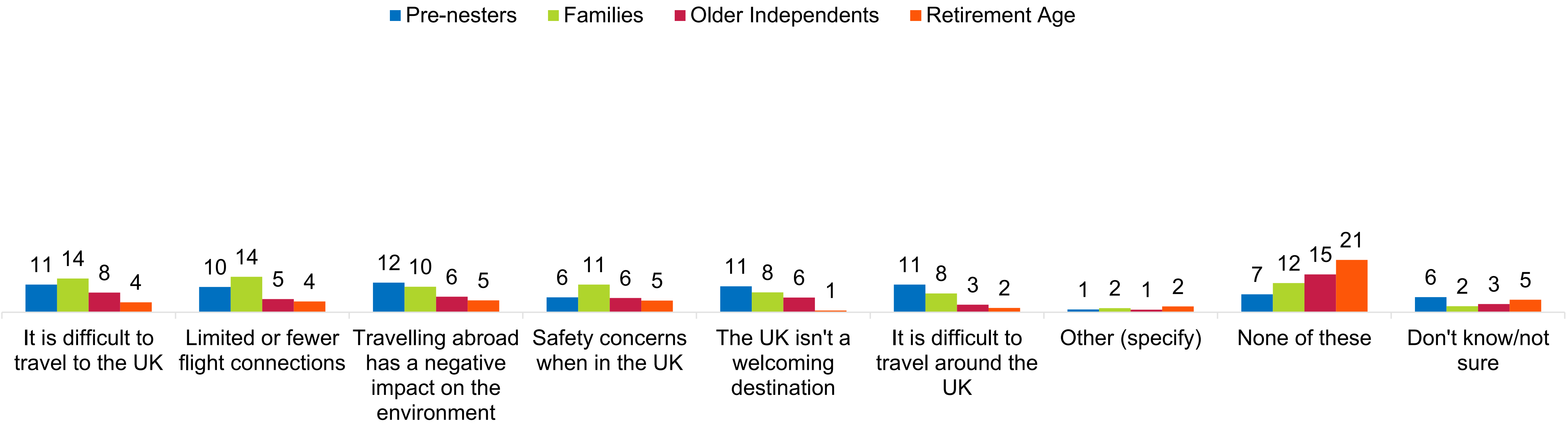
Barriers to taking a UK overnight trip by life stage

- Pre-nesters index highest compared to other life stages on ‘the UK isn’t welcoming’ and ‘it is difficult to travel around the UK’.
- Both pre-nesters and families are more likely than other life stages to report travel difficulties as barriers to visiting the UK in the next few years, including ‘limited or fewer flight connections’, as well as ‘it is difficult travelling both to and around the UK’.
- Additionally, both pre-nesters and families are more likely to cite the negative environmental impact of travelling abroad as a barrier to visiting the UK in the next few years.

Figure 14. Barriers to take a UK holiday/short break in next few years by life stage, Percentage, Bottom 7, All respondents



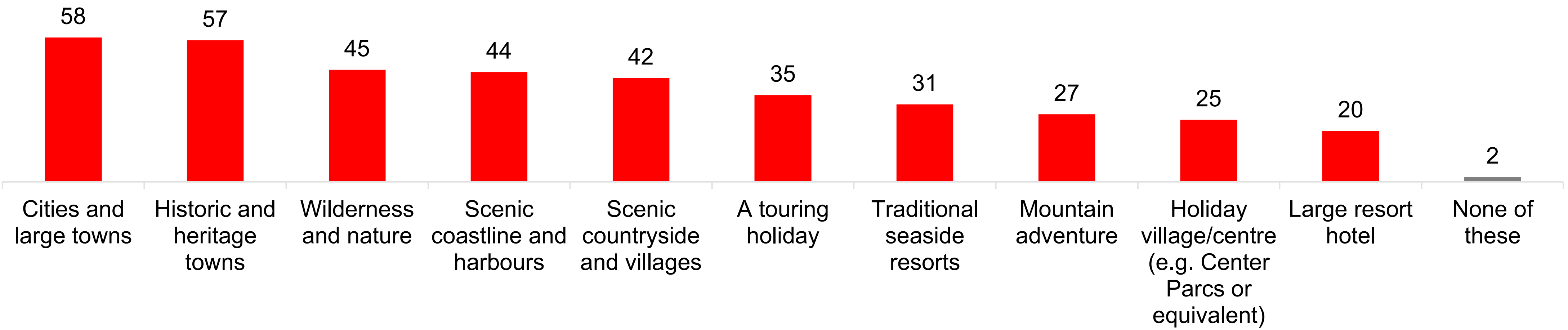
S9. Which, if any, of these are barriers to people like you taking a short break or holiday in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

Trip Influences and Preferences

Destination types seriously considering for a UK overnight trip

- 'Cities and large towns' and 'historic and heritage towns' are the destination types the German holiday market are most likely to be 'seriously considering' for a UK holiday or short break in the next few years. 'Wilderness and nature', 'scenic coastline and harbours' and 'scenic countryside and villages' also generate strong consideration.
- On average, the German market would seriously consider around four destination types for a UK holiday. Notably, 'historic and heritage towns' tends to be the destination type most likely to be considered in combination with others – for example, 67% of those that would consider a 'city and large town' would also consider a 'historic and heritage town'.

Figure 15. Destination types seriously considering a UK holiday/short break in next few years, Percentage, All respondents



B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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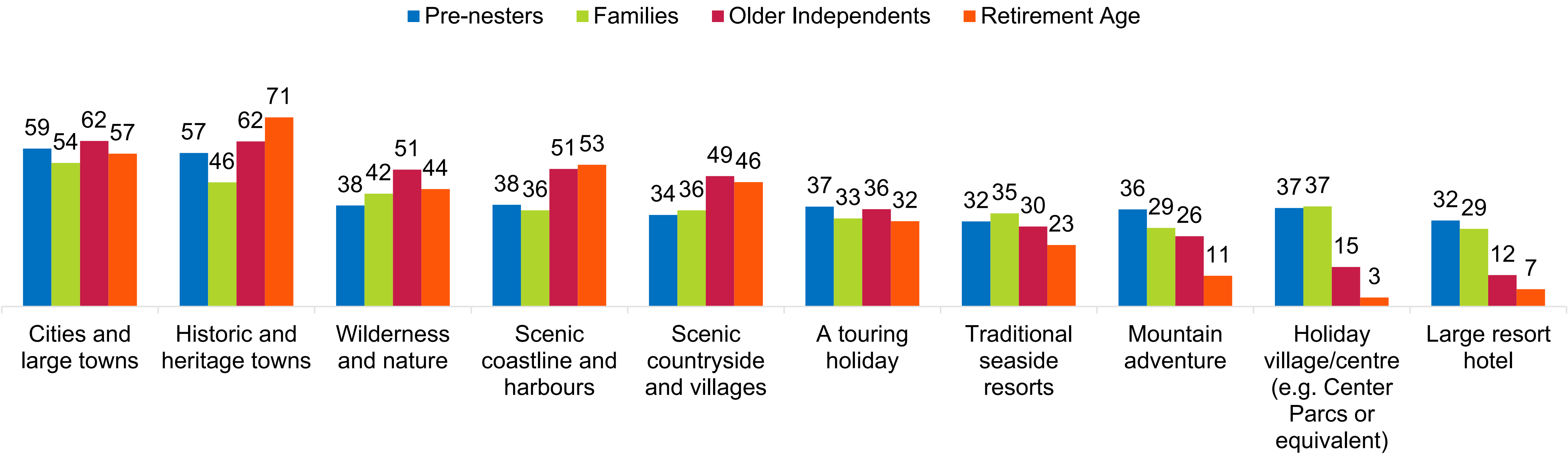
Destination types seriously considering – by life stage

- All life stages show a strong interest in visiting ‘cities and large towns’, although there is some variation across other destination types. Older independents and retirees are more likely to show an interest in ‘historic and heritage towns’, ‘scenic coastline and harbours’ and ‘scenic countryside and villages’.
- Younger life stages (pre-nesters and families) index higher on interest in ‘holiday villages/centres’ and ‘large resort hotels’.

Figure 16. Destination types seriously considering a UK holiday/short break in next few years by life stage, Percentage, All respondents



B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

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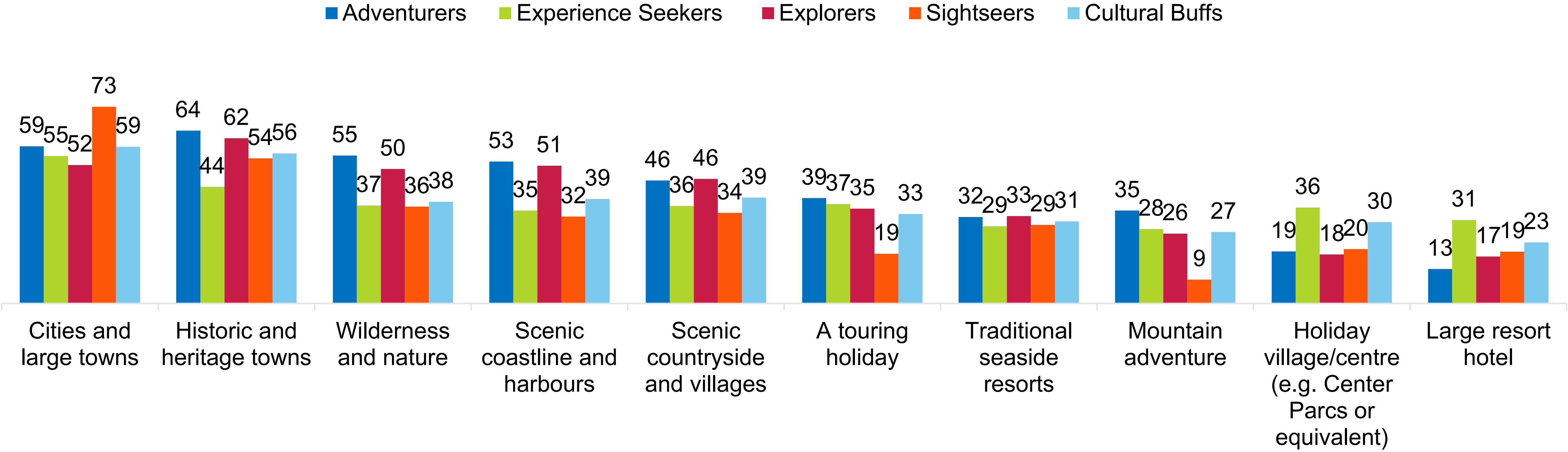
Destination types seriously considering – by VisitBritain segments

- Destination preference by segment aligns with general preferences. For example, 'sightseers' are the most likely to seriously consider 'cities and large towns'. 'Explorers' and 'adventurers' index higher on destinations that involved the outdoors, notably 'wilderness and nature' and 'scenic coastline and harbours'.

Figure 17. Destination types seriously considering a UK holiday/short break in next few years by segment, Percentage, All respondents



B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents. Adventurers n=264; Experience Seekers n=214; Explorers n=232; Sightseers n=105; Cultural Buffs n=185

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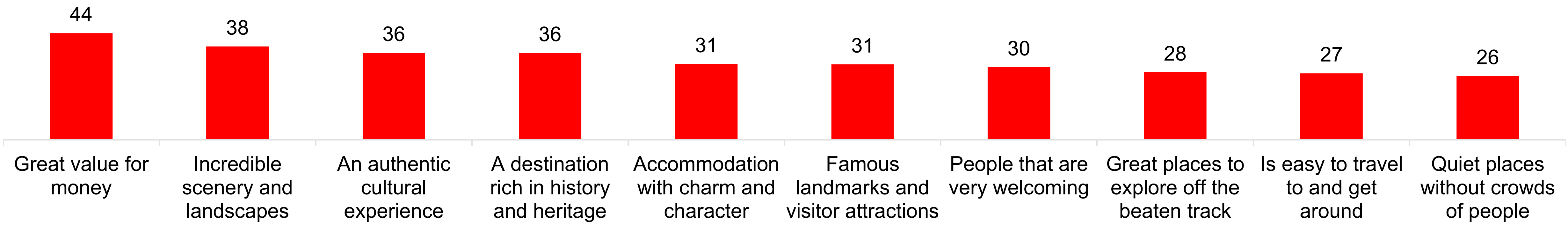
Destination influences for a UK overnight trip

- A broad range of factors influence destination choice for UK holidays among the German holiday market. ‘Great value for money’ is the leading influence, followed by ‘incredible scenery and landscapes’, ‘an authentic cultural experience’ and ‘a destination rich in history and heritage’. ‘Accommodation with charm and character’, ‘famous landmarks and visitor attractions’ and ‘people that are very welcoming’ are also influential.

Figure 18. Destination influences for a UK trip, Percentage, Top 10, All respondents

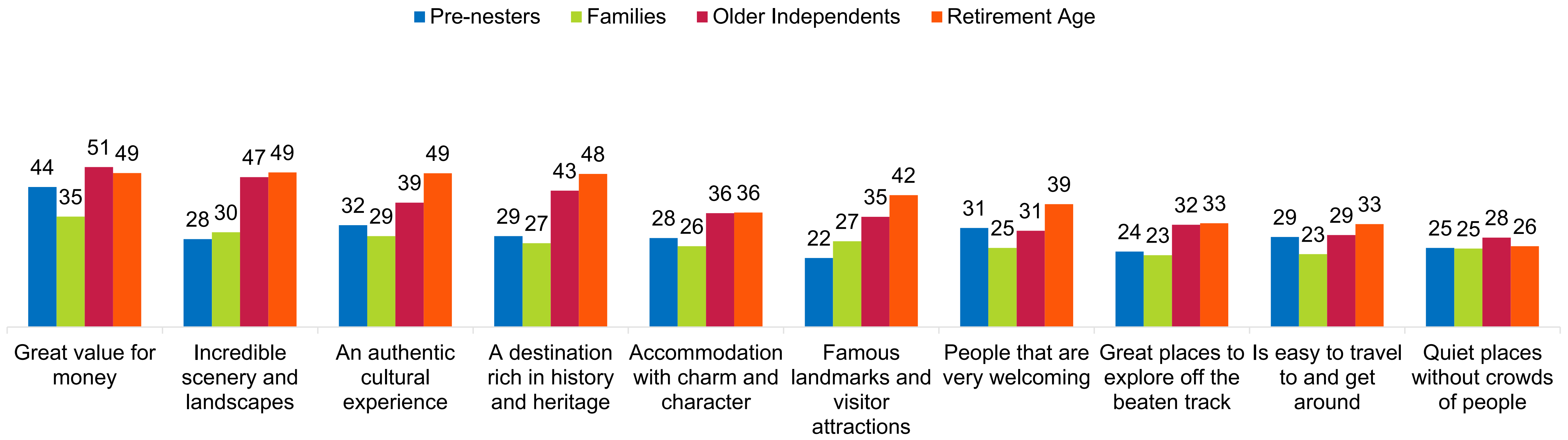


B2. Below is a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted.
Base: All respondents n=1,000

Destination influences for a UK overnight trip – by life stage

- ‘Great value for money’ is the leading destination influence for all life stages, but in particular for older independents and retirees who are most likely to see expense as a barrier to visiting the UK, and to be cautious around the cost-of-living crisis.
- Other destination influences vary by life stage. Older independents and retirees index higher on most influences, but are particularly likely to favour ‘incredible scenery and landscapes’, ‘an authentic cultural experience’, ‘a destination rich in history and heritage’, and ‘famous landmarks and visitor attractions’. They are also more likely to cite ‘accommodation with charm and character’ and ‘great places to explore off the beaten track’ than the younger life stages.

Figure 19. Destination influences for a UK trip by life stage, Percentage, Top 10, All respondents



B2. Below is a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

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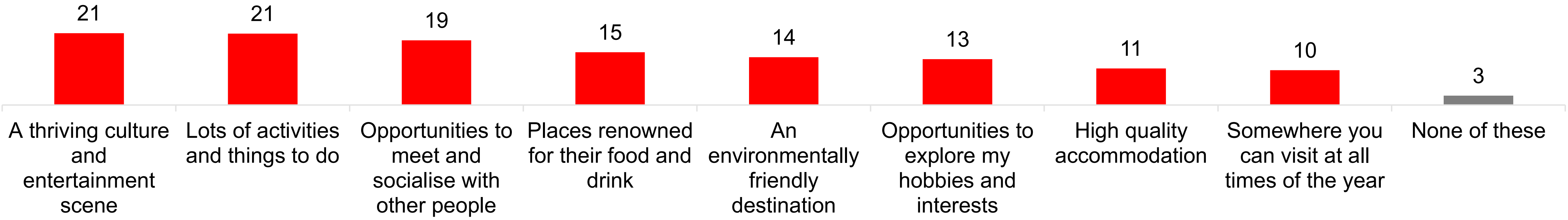
Destination influences for a UK overnight trip

- A range of other destination influences are also important, although ‘opportunities to explore my hobbies and interests’, ‘high quality accommodation’ and ‘somewhere you can visit at all times of the year’ are at the bottom of the list.

Figure 20. Destination influences for a UK trip, Percentage, Bottom 8, All respondents

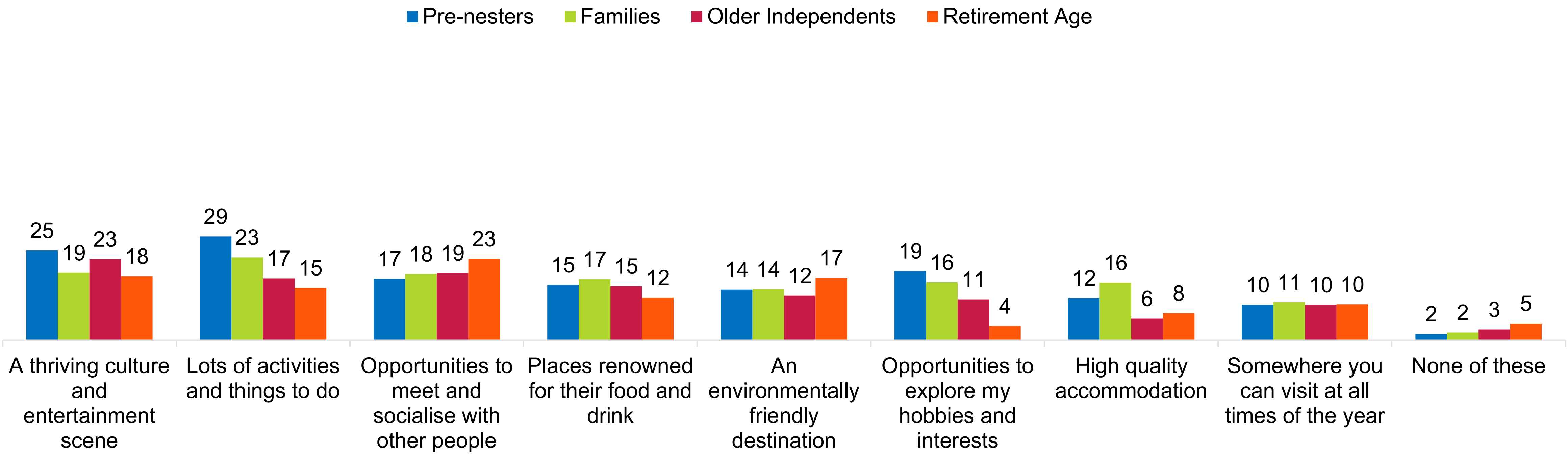


B2. Below is a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted.
Base: All respondents n=1,000

Destination influences for a UK overnight trip – by life stage

- Pre-nesters find ‘a thriving culture and entertainment scene’ and having ‘lots of activities and things to do’ more influential than other life stages. Retirees index higher for ‘opportunities to meet and socialise with other people’ and ‘an environmentally friendly destination’.

Figure 21. Destination influences for a UK trip by life stage, Percentage, Bottom 8, All respondents

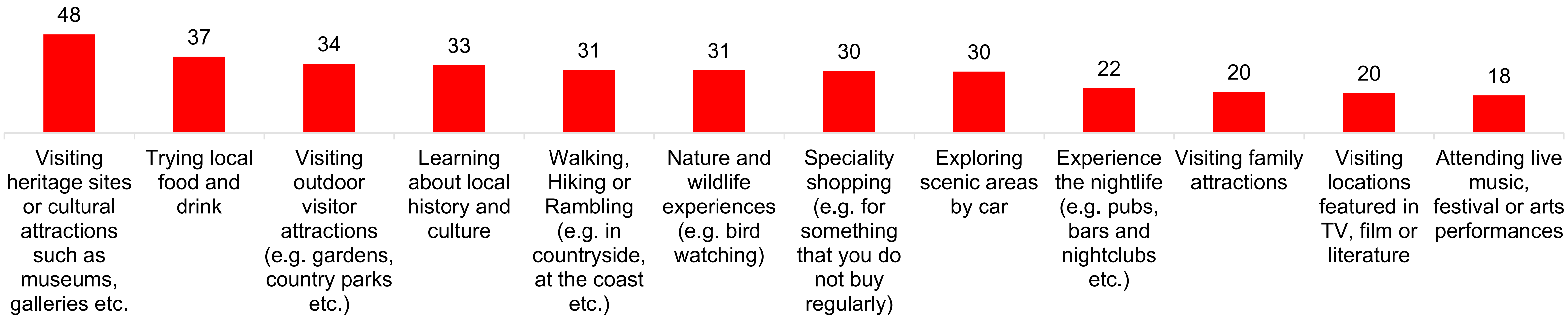


B2. Below is a list of influences people have given for choosing their holiday and short break destinations. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

Experiences would most like to do on a UK holiday/short break

- In terms of experiences, the German market shows a strong interest in ‘history and heritage’ – ‘visiting heritage sites’ (48%) and ‘learning about local history and culture’ (33%) are in the top 4 most preferred experiences. There is also considerable interest in ‘the outdoors’ – ‘visiting outdoor attractions (34%), ‘walking, hiking or rambling’ (31%) and ‘nature and wildlife experiences’ (31%) are in the top 6 most preferred experiences.
- Additionally, there is also strong interest in ‘trying local food and drink (37%) and ‘speciality shopping’ (30%).

Figure 22. Experiences would most like to do on a UK trip, Percentage, Top 12, All respondents



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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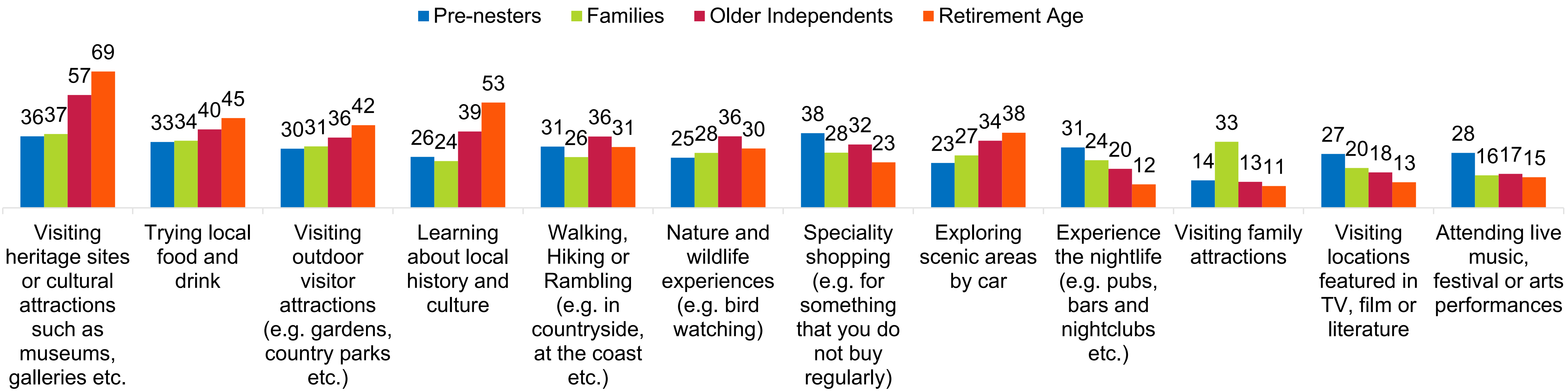
Experiences would most like to do – by life stage

- There are some differences in preferred experiences by life stage. Overall preference for 'visiting heritage sites or cultural attractions' is driven by older independents and retirees, who are also most likely to want to visit to 'learn about local history and culture' and 'try local food and drink'.
- Unsurprisingly, families are the most likely to be interested in 'visiting family attractions'.
- Although of limited interest overall, 'visiting locations featured in TV, film and literature' and 'attending live music, festivals or arts performances' are of relatively high interest to pre-nesters.

Figure 23. Experiences would most like to do on a UK trip by life stage, Percentage, Top 12, All respondents



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

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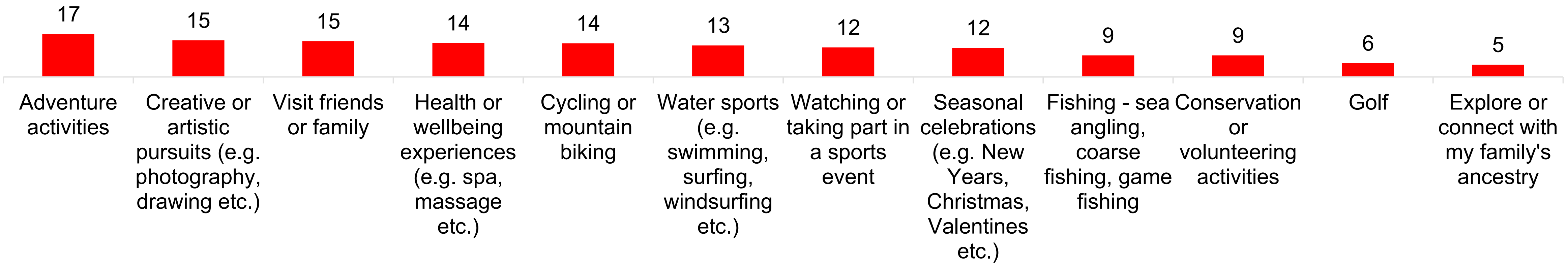
Experiences would most like to do on a UK holiday/short break

- A range of other activities appeal to a more niche audience. For example, ‘adventure activities’ are of interest to 17%, and 15% are interested in ‘creative or artistic pursuits’ or ‘visiting friends or family’.
- Activities such as ‘exploring or connecting with my family’s ancestry’, ‘golf’, ‘conservation or volunteering’ and ‘fishing’ are least likely to be preferred experiences on a holiday or short break in the UK.

Figure 24. Experiences would most like to do on a UK trip, Percentage, Bottom 12, All respondents



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents n=1,000

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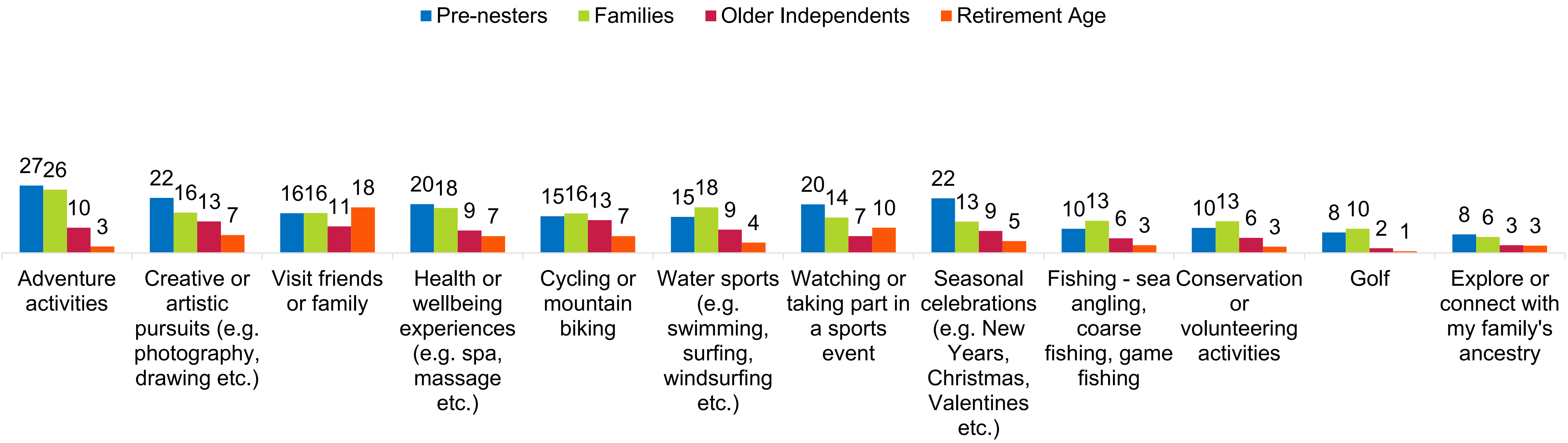
Experiences would most like to do – by life stage

- Of the less popular activities, pre-nesters and families index relatively highly on 'adventure activities'. Pre-nesters are the most likely to be interested in 'creative or artistic pursuits', 'watching or taking part in a sports event' and 'seasonal celebrations'.
- Those of retirement age are more likely to 'visit friends or family'.

Figure 25. Experiences would most like to do on a UK trip by life stage, Percentage, Bottom 12, All respondents



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

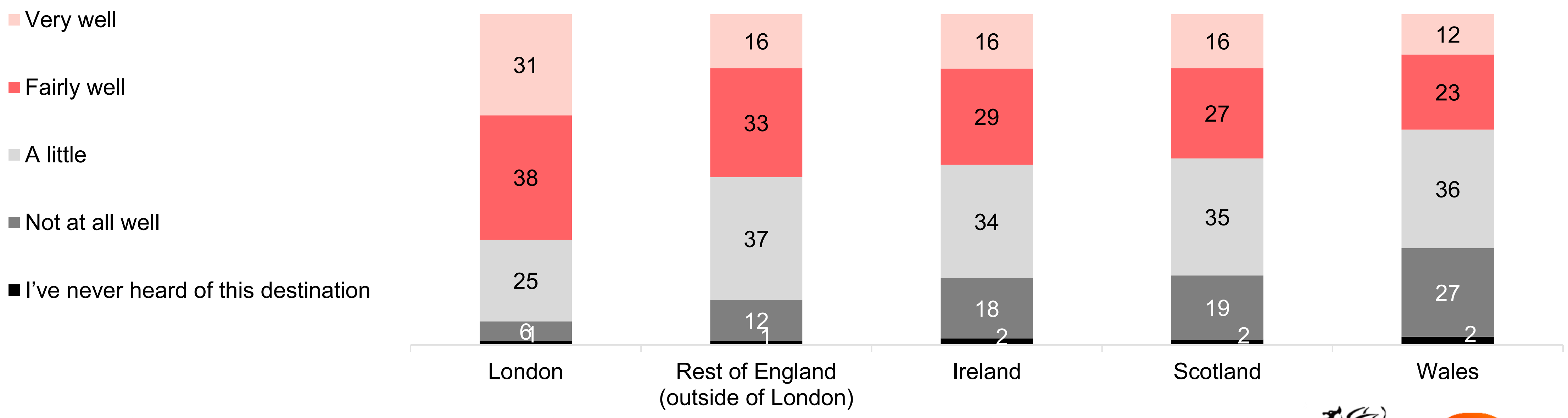
Back to contents

Destination Relationships and Previous Visits

Familiarity with Wales and other destinations

- Of the destinations tested within this research, the German holiday market are most familiar with London, with 69% stating that they know what there is to see and experience here ‘very’ or ‘fairly well’.
- The Rest of England, Scotland and Ireland all receive similar levels of familiarity (between 43% and 49%).
- Just over a third (35%) believe they know what there is to see and experience on holiday in Wales. Familiarity with Wales is lower than any other destination tested.
- Unsurprisingly, those with a connection to Wales show higher familiarity with Wales – for example, 60% of those with Welsh ancestry or with families living in Wales are familiar with Wales. Only 28% of those who reported no connection to Wales are familiar with Wales.

Figure 26. Familiarity with each destination, Percentage, All respondents

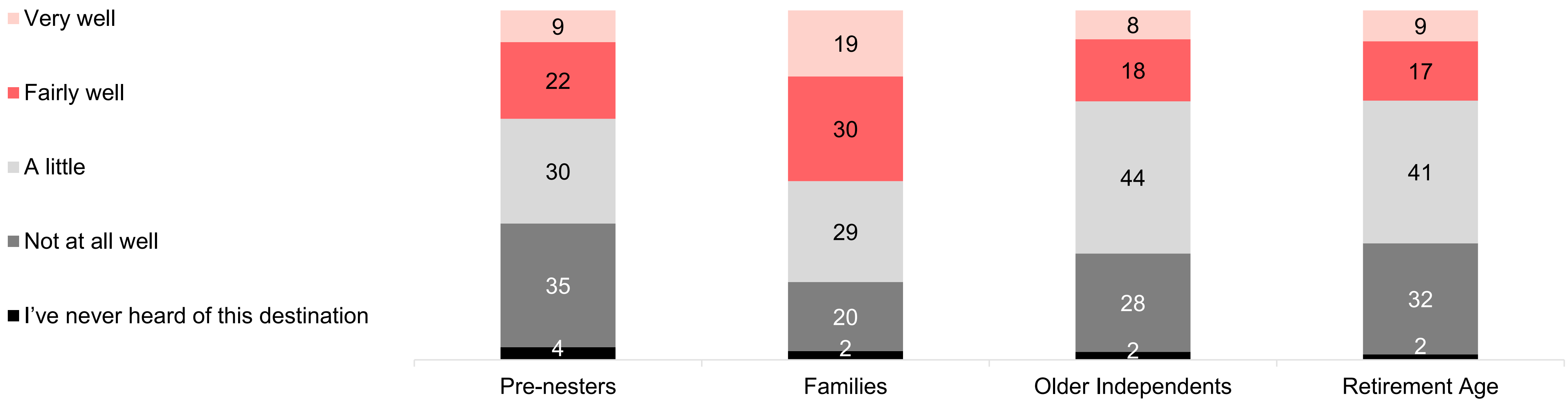


C1. How well, if at all, do you know what there is to see and experience on a holiday or short break in each of these parts of the UK and Ireland? All data weighted.
Base: All respondents n=1,000

Familiarity with Wales by life stage

- A majority of all life stages report that they do not know Wales very or fairly well as a holiday destination – this is particularly high amongst older independents and retirees.
- Families report the strongest familiarly with Wales – just under half (49%) say that they know what there is to see and experience on a holiday or short break to Wales 'very' or 'fairly well'. Older independents and retirees report the lowest familiarity, a pattern that is not consistent with other destinations

Figure 27. Familiarity with Wales by life stage, Percentage, All respondents



C1. How well, if at all, do you know what there is to see and experience on a holiday or short break in each of these parts of the UK and Ireland? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

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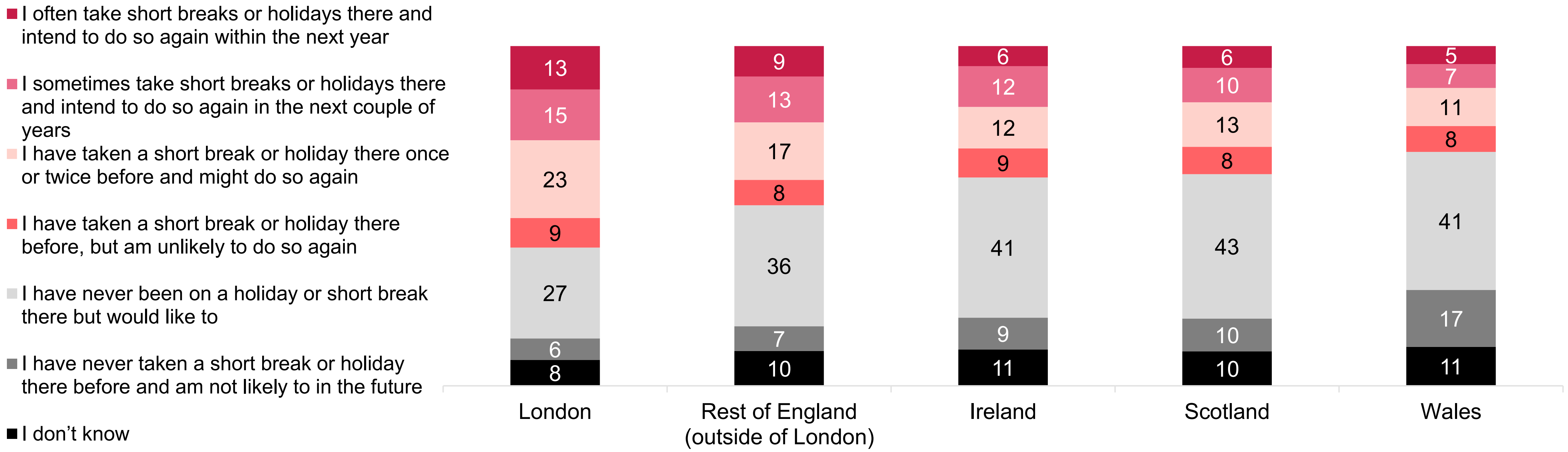
Loyalty with Wales and other destinations

- Aligned with familiarity, Wales is the part of the UK and Ireland that has attracted the lowest proportion of regular and previous visitors. London is most likely to generate regular trips, more than a quarter (28%) of the German holiday market stating that they ‘often’ or ‘sometimes’ go there, followed by ‘Rest of England’ (22%), Ireland (18%), Scotland (16%) and Wales (12%).
- Positively, 41% of the German holiday market have never been to Wales for a holiday/short break but would like to – a similar proportion to Scotland and Ireland.

Figure 28. Relationship with each destination, Percentage, All respondents

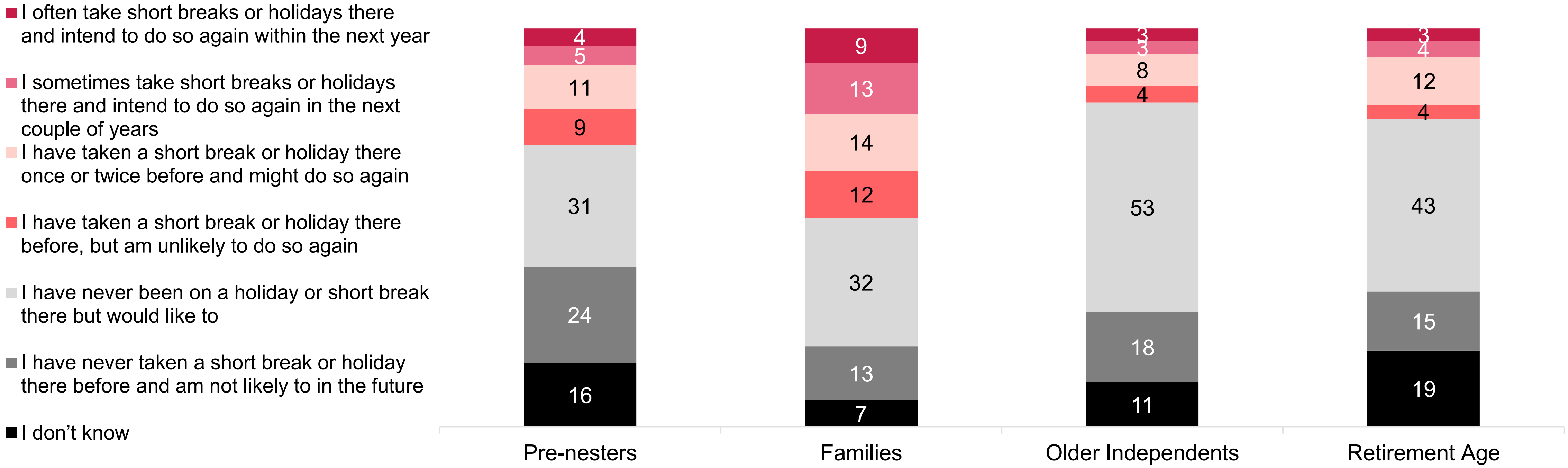


C3. Which of the following statements best applies to you when it comes to visiting these destinations? All data weighted.
Base: All respondents n=1,000

Loyalty with Wales by life stage

- Families are the most likely to report 'often' or 'sometimes' taking short breaks or holidays to Wales (22%), in line with their greater relative familiarity with Wales. Older independents and retirees are the least likely to visit Wales 'often' or 'sometimes', closely followed by pre-nesters.
- Over half of older independents have never been to Wales and would like to, suggesting strong potential to convert to visits.

Figure 29. Relationship with Wales by life stage, Percentage, All respondents



C3. Which of the following statements best applies to you when it comes to visiting these destinations? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

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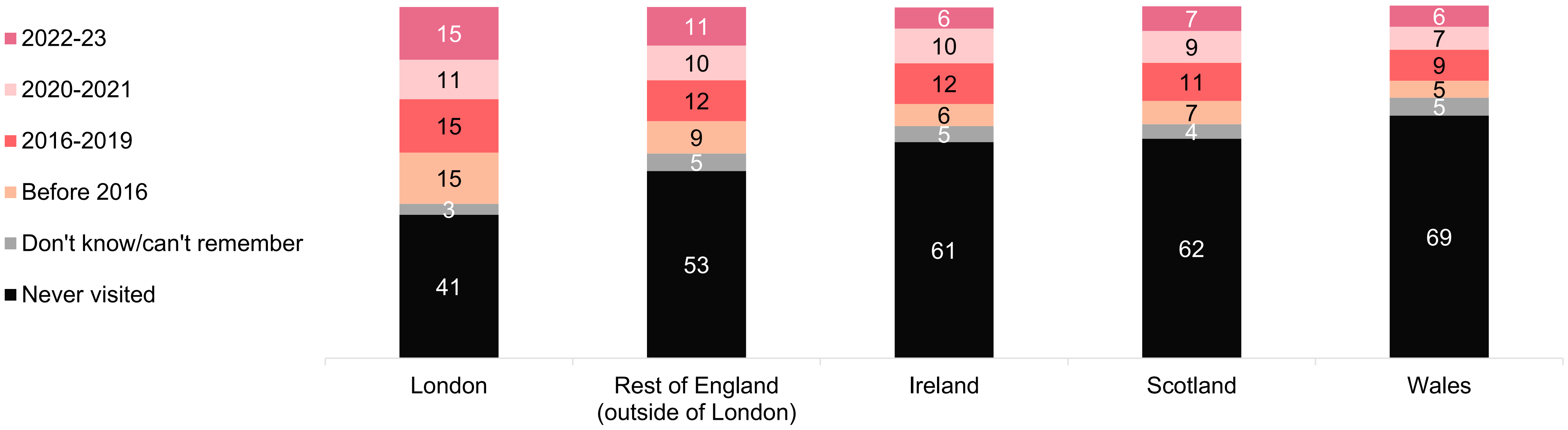
Previous visits to each destination

- London and the Rest of England have the highest level of previous visits from the German market, with over half having previously visited London, and both of these destinations were the most visited overnight destinations in 2022-2023, 15% and 11% having visited them respectively.
- 27% stated they have previously visited Wales for an overnight short break or holiday, lower than the 34% that have visited Scotland and Ireland.

Figure 30. Previous visits to each destination, Percentage, All respondents

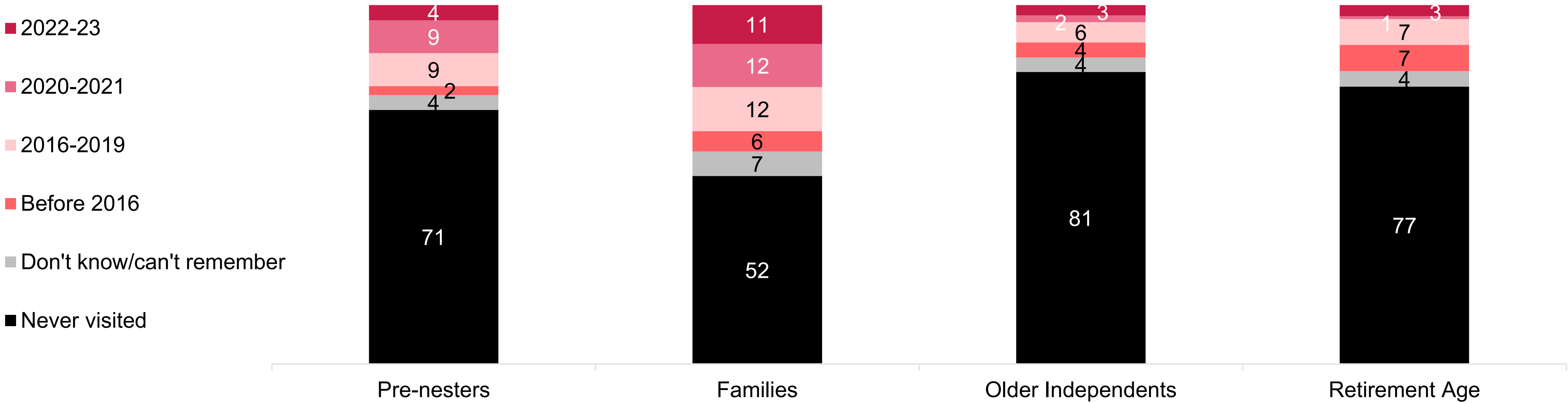


C4. When did you last visit these places for a holiday or short break? All data weighted.
Base: All respondents. n=1,000

Previous visits to Wales by life stage

- Aligned with general familiarity with Wales as a destination, families are the life stage most likely to have taken a trip in Wales since 2020-21, 23% having done so in that time.
- Retirees and older independents show a significantly lower level of recent visitation since 2020 but comparatively similar visitation between 2016 and 2019. This does suggest that older life stages have ‘dropped off’ in their visit behaviour and there is potential to reactivate.

Figure 31. Previous visits to Wales by life stage, Percentage, All respondents



C4. When did you last visit these places for a holiday or short break? All data weighted.
Base: Pre-nesters n=45; Families n=171; Older Independents n=67; Retirees n=27

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Previous visits to each destination by life stage and segment

- Amongst the family life stage, Wales has similar levels of previous visitation to Scotland and Ireland. Amongst other life stages previous visits to Wales are notably lower than to other destinations, which is a similar trend to Scotland, Ireland and the Rest of England. Pre-nesters and families are more likely than other life stages to have visited each of the destinations surveyed.
- Amongst segments, Wales has the highest visitation from Experience Seekers and Cultural Buffs.

Figure 32. Previous visits to destinations by life stage, Percentage, All respondents

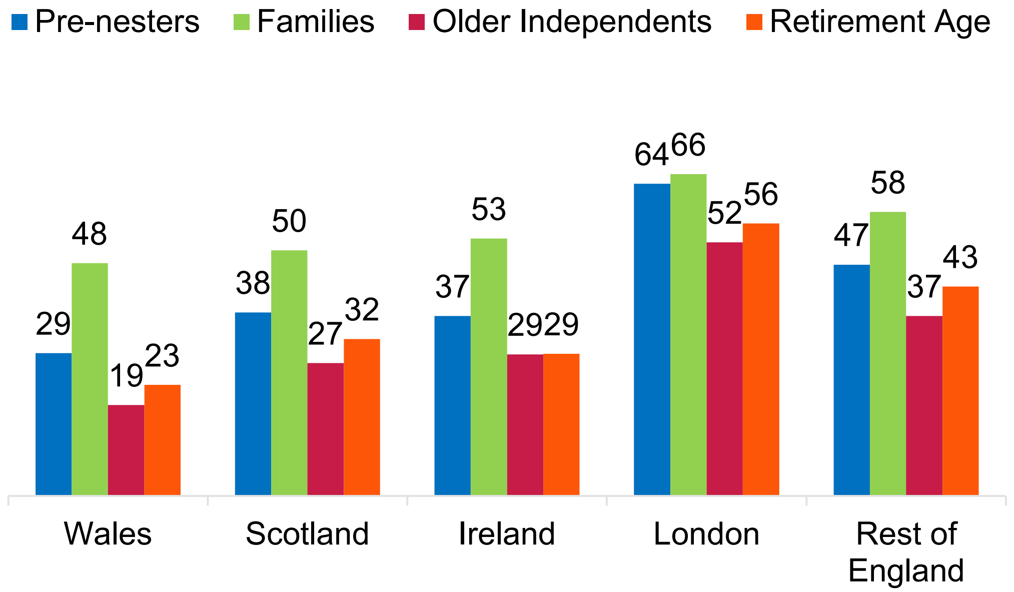
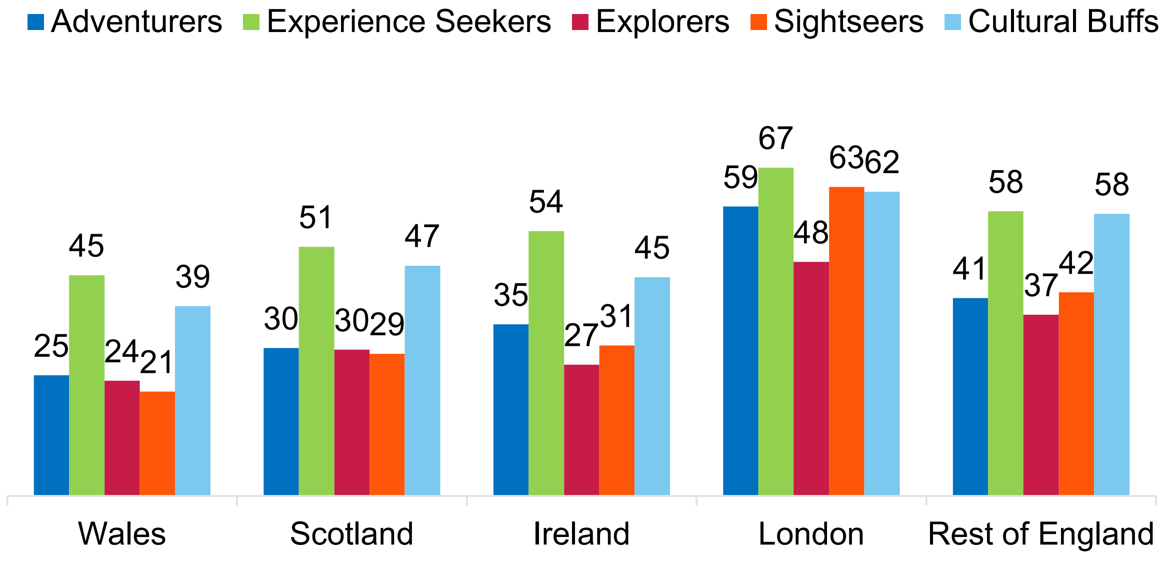


Figure 33. Previous visits to destinations by segment, Percentage, All respondents



C4. When did you last visit these places for a holiday or short break? All data weighted.
Base: Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126; Adventurers n=264; Experience Seekers n=214; Explorers n=232; Sightseers n=105; Cultural Buffs n=185

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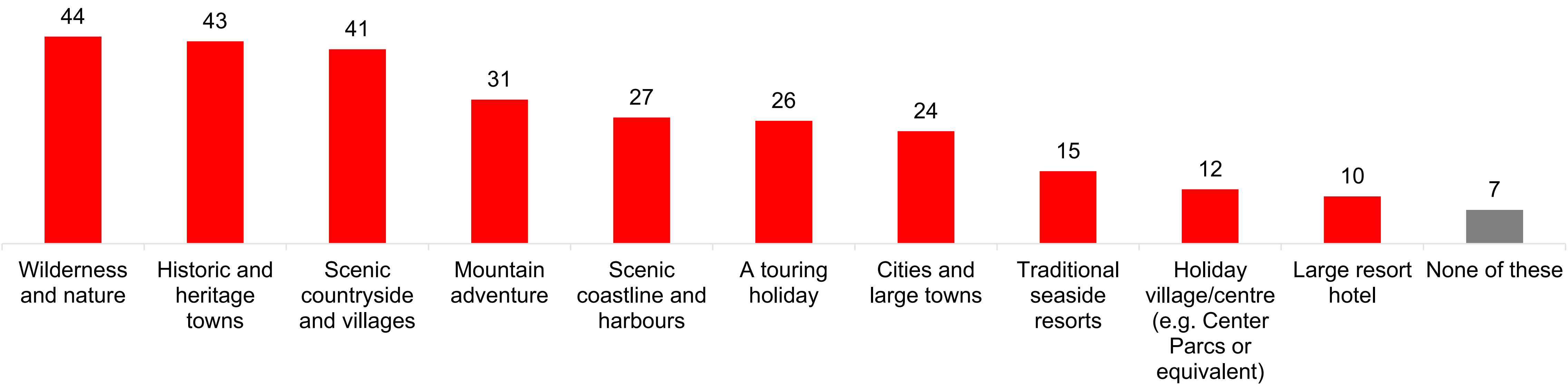
Back to contents

Destination Associations and Preferences

Destination types associated with Wales

- The German market mostly associates Wales with ‘wilderness and nature’ (44%), followed closely by ‘historic and heritage towns’ (43%) and ‘scenic countryside and villages’ (41%).
- They are least likely to associate Wales with ‘large resort hotels’, ‘holiday villages/centres’ and ‘traditional seaside resorts’.

Figure 34. Destination associations with Wales, Percentage, All respondents



D1. Which, if any, of these places do you most associate with these destination types? All data weighted.
Base: All respondents n=1,000

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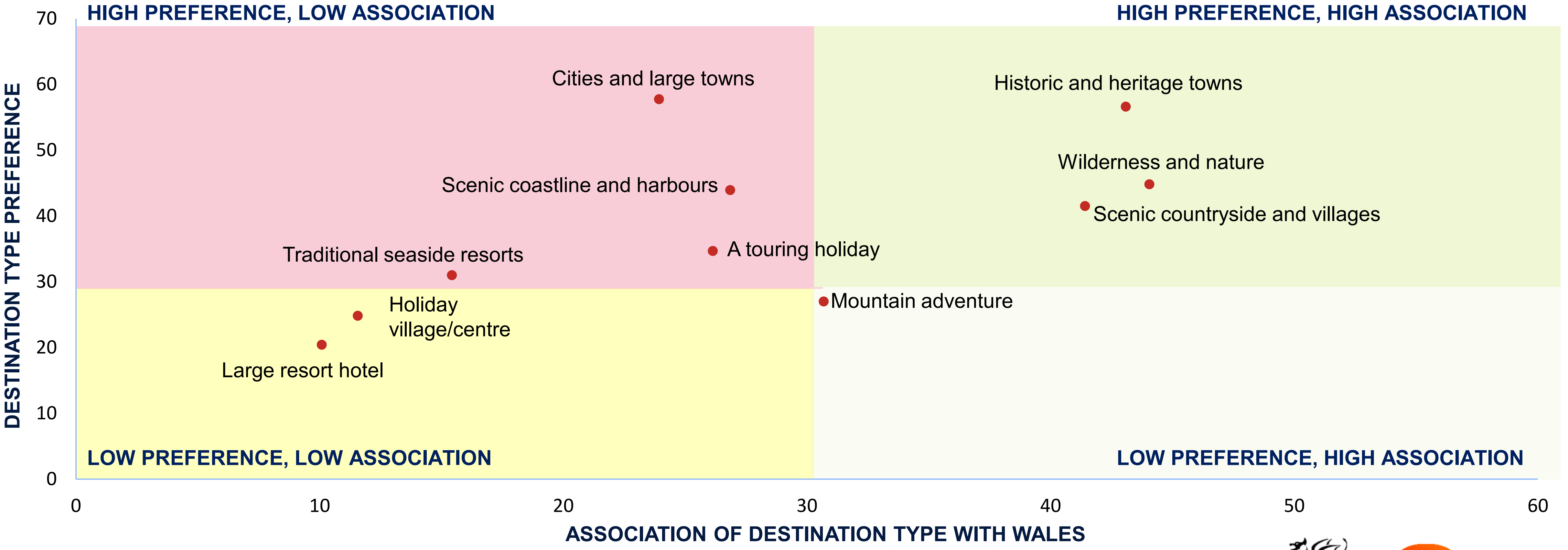
Destination types associations against preferences

- Of the types of destinations the German market show the most interest in, Wales has stronger perceptions for ‘historic and heritage towns’, ‘wilderness and nature’ and ‘scenic countryside and villages’. It has weaker perceptions for ‘cities and large towns’, ‘scenic coastline and harbours’, ‘touring holidays’ and ‘traditional seaside resorts’.

Figure 35. Wales destination type association against destination type preference, Percentage, All respondents



D1. Which, if any, of these places do you most associate with these destination types? B1. To which, if any, would you seriously consider taking a holiday or short break in the UK in the next few years? All data weighted.
Base: All respondents considering each destination

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Destination types associated with selected UK destinations

- Relative to other destinations, Wales has weaker associations for most holiday types.
- Wales only ranks within the top 3 destinations for Holiday Centre/Village, Seaside Resorts and Mountain Adventure, although the associations with the latter two are well behind the leading destination for those holiday types.
- Ireland is the destination most strongly associated with Scenic Countryside and villages, whereas Scotland is most strongly associated with Historic and Heritage Towns, Mountain Adventure and Wilderness and Nature.
- London & the Rest of England are most associated with cites and large towns, whereas Wales has the lowest association with these and Heritage Towns.

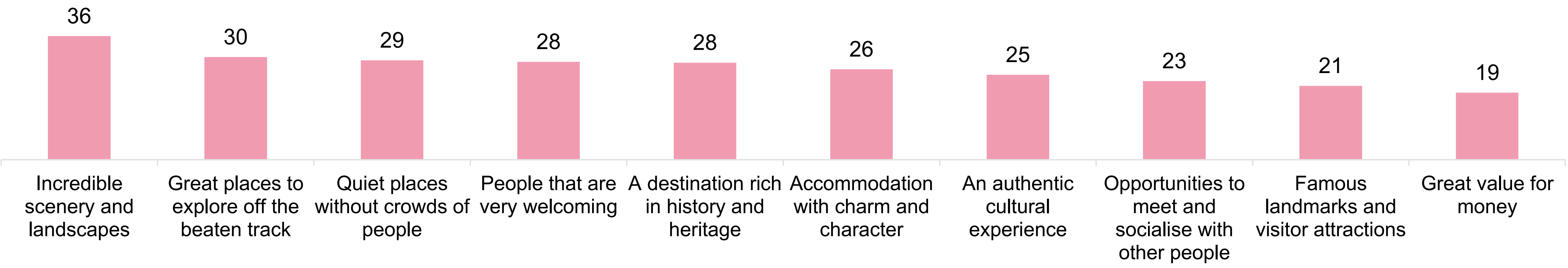
Figure 36. Destinations most strongly associated with each destination type*, All respondents

D1. Which, if any, of these places do you most associate with these destination types? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to German market

Destination influences associated with Wales

- In terms of destination influences, Wales is most associated with ‘incredible scenery and landscapes’ and ‘great places to explore off the beaten track’, both generating an association of 30% and above. ‘Quiet places without crowds’, ‘people that are very welcoming’ and ‘a destination rich in history and heritage’ also make the top 5 associations, each generating an association of 28% to 29%.

Figure 37. Destination influence associations with Wales, Percentage, Top 10, All respondents



D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000

Destination influences associated with Wales

- Wales has weaker associations with 'high quality accommodation' and 'places renowned for their food and drink', although this will in part be driven by these influences being weaker priorities for the German market.

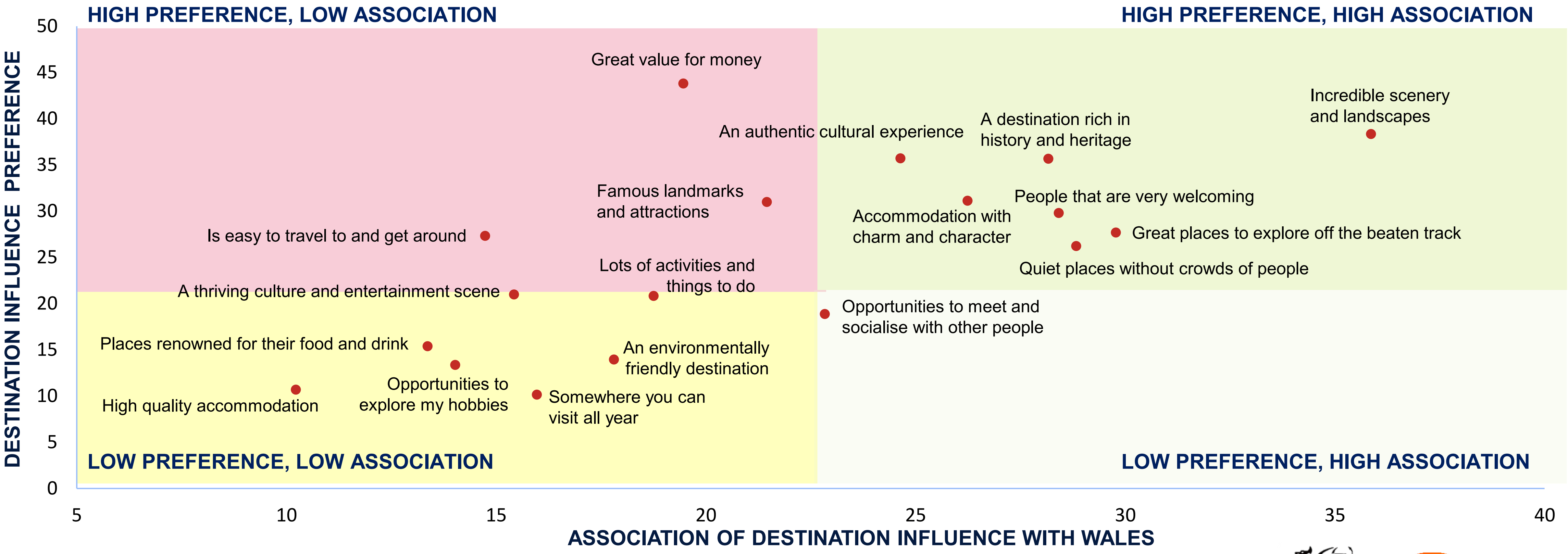
Figure 38. Destination influence associations with Wales, Percentage, Bottom 8, All respondents

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000

Destination influence associations against preferences

- Generally, the destination influences where Wales has the highest associations are also some of the most important to the German market. However, Wales also has some low associations with influences important to the German market, including 'great value for money', 'famous landmarks and attractions' and 'is easy to travel to and get around'.

Figure 39. Wales destination influence association against destination influence preference, Percentage, All respondents



D2. Which, if any, of these places do you most associate with each influence? B2. Which, if any, are most influential when you think about choosing holidays or short breaks in the UK? All data weighted.
Base: All respondents n=1,000

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Destination associations – trip influences

- London is the lead destination for culture and history, famous landmarks, as well as the ease of travelling around.
- Scotland and Ireland have similarly strong associations with 'incredible scenery and landscapes', 'accommodation with charm and character', 'people that are very welcoming' and 'great places to explore off the beaten track'.
- Wales lacks clear differentiation on any of these factors, and is particularly far behind Scotland and Ireland on its strongest association, 'incredible scenery and landscapes'.

Figure 40. Destinations most strongly associated with each trip influence*, Top 9 in order of importance, All respondents

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to German market

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Destination associations – trip influences

- London is notable for its associations with majority of the factors listed below, except for being ‘a quiet place without crowds of people’, and ‘an environmentally friendly destination’.
- Scotland, Ireland and Wales have similar overall pattern of associations with different trip influences. However, again, Wales is behind on almost all measures.

Figure 41. Destinations most strongly associated with each trip influence*, Bottom 9 in order of importance, All respondents

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to German market

Experiences associated with Wales

- In relation to experiences, Wales is most strongly associated with 'nature and wildlife', 'visiting heritage sites or cultural attractions', 'learning about local history and culture', 'walking, hiking or rambling' and 'exploring scenic areas by car'. However, no single experience stands out as defining Wales as a destination.

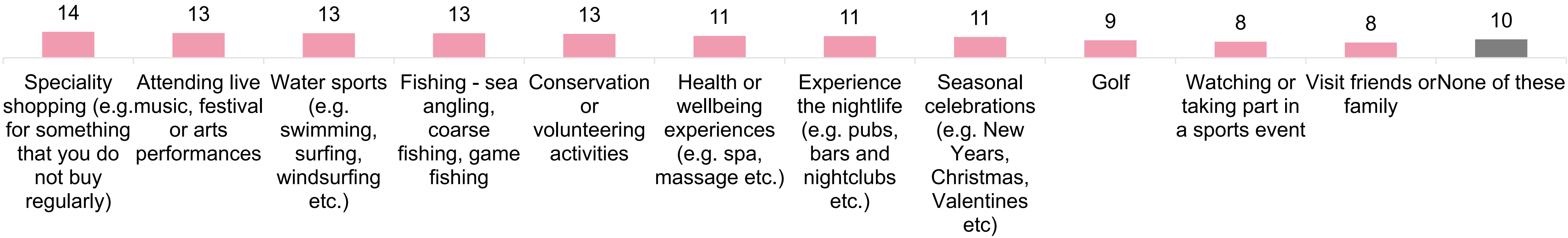
Figure 42. Experience associations with Wales, Percentage, Top 12, All respondents

D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,000

Experiences associated with Wales

- Associations are relatively low for 'visiting friends and family', 'watching or taking part in a sports event' and 'golf', although this will in part be linked to how relevant specific experiences are to individual respondents.

Figure 43. Experience associations with Wales, Percentage, Bottom 11, All respondents

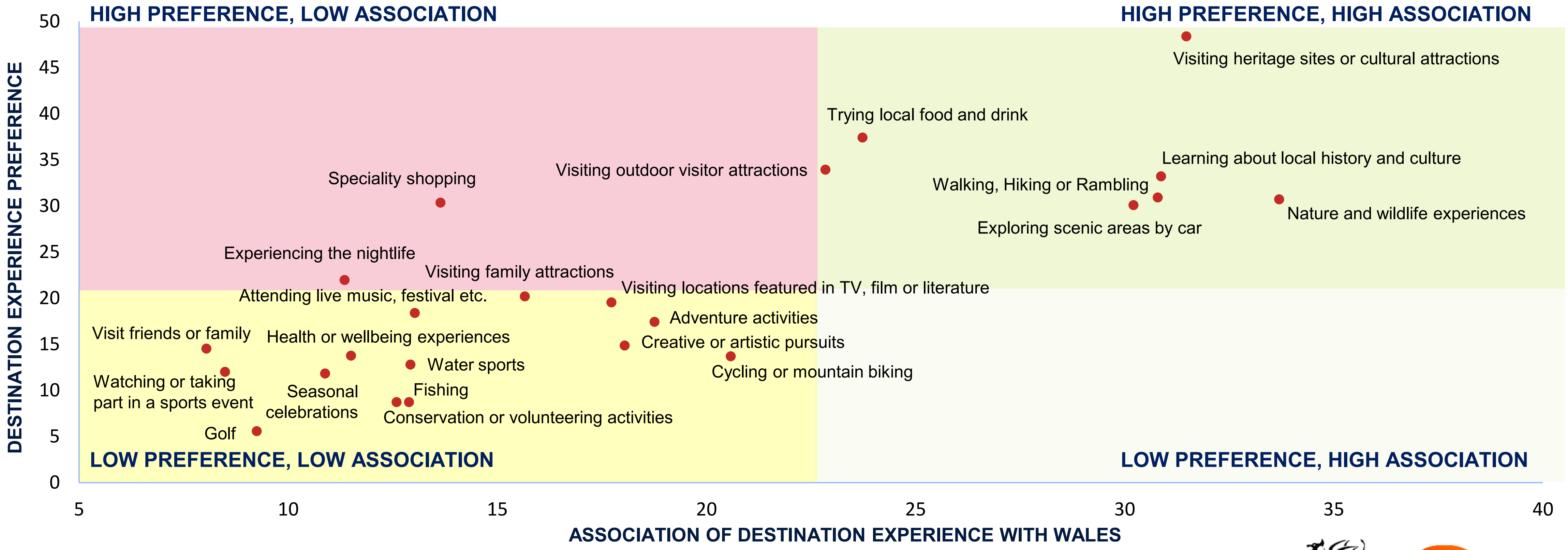


D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,000

Destination experience associations against preferences

- Wales has higher associations with the majority of destination experiences that are of high importance, in particular for 'visiting heritage sites or cultural attractions', 'nature and wildlife experiences' and 'learning about local history and culture'. It has weaker associations with 'visiting outdoor visitor attractions' and 'speciality shopping'

Figure 44. Wales destination experience association against destination experience preference, Percentage, All respondents



D3. And which, if any, of these places do you think are best suited to these holiday experiences? B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? All data weighted. Base: All respondents n=1,000

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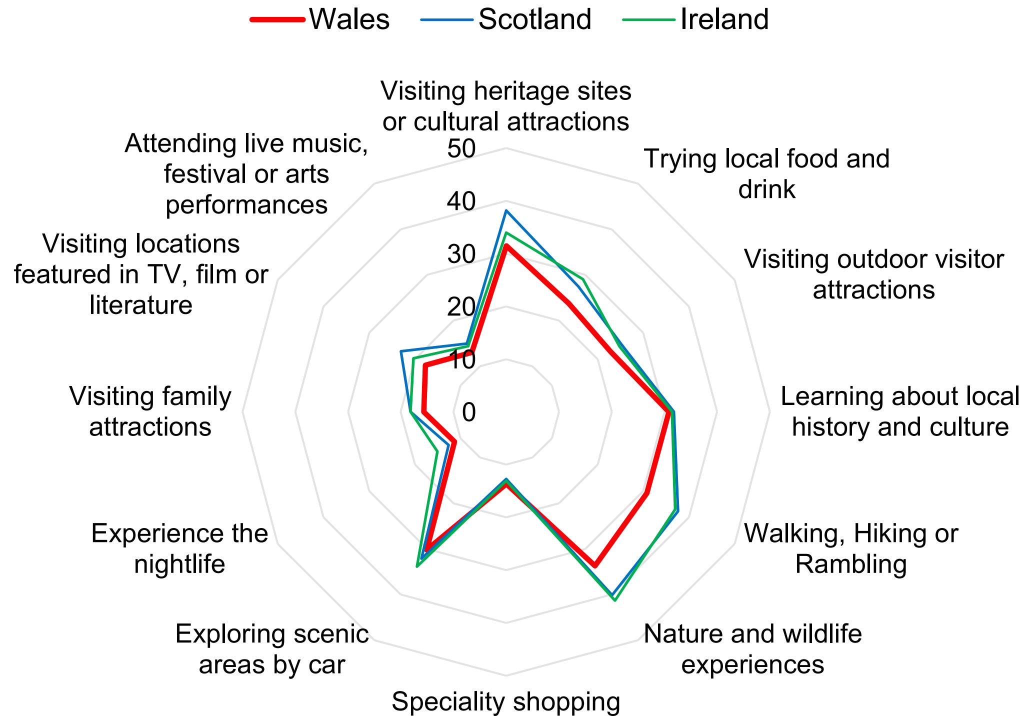
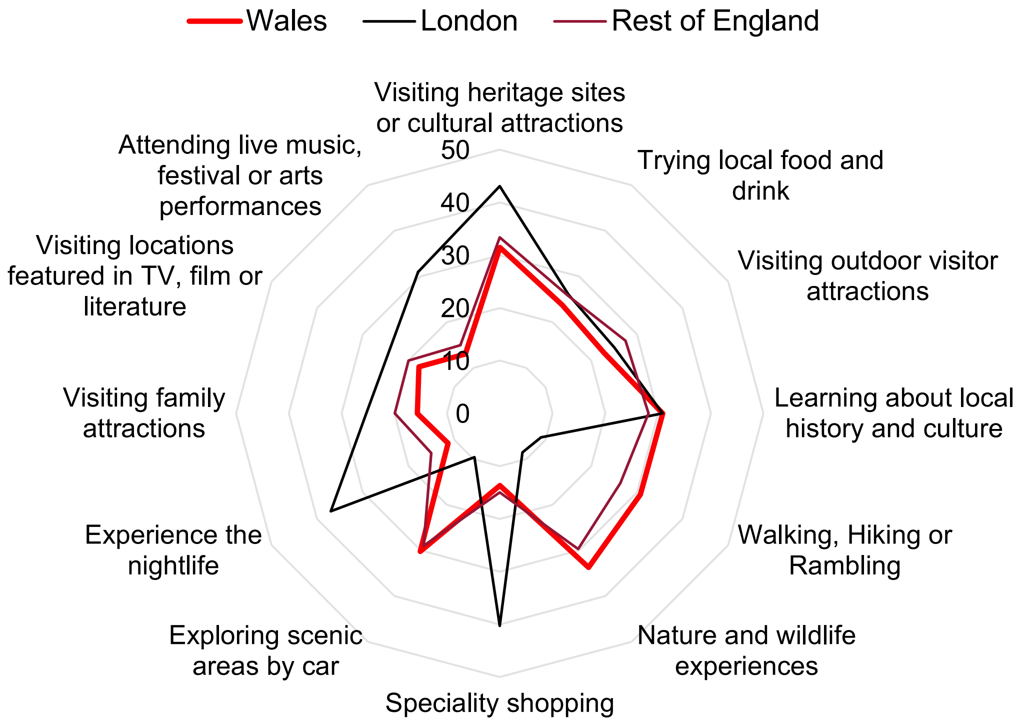
Welsh Government

Destination associations – trip experiences

- Scotland, Ireland, Rest of England (outside of London) and Wales have similar overall pattern of associations with different trip experiences. Scotland and Ireland have relatively strong associations with 'walking, hiking or rambling' and 'nature and wildlife experiences'
- Although almost all the destinations have weak associations with 'speciality shopping', 'experience the nightlife' and 'attending live music/festival/arts performances', London is strongly associated with these experiences.
- Although Wales tends to have the lowest association of most trip experiences, it is on a par with Ireland, Scotland and the Rest of England as somewhere for 'exploring scenic areas by car' and 'learning about local history and culture'.

Figure 45. Destinations most strongly associated with each trip experience*, Top 12 in order of importance, All respondents





D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to German market

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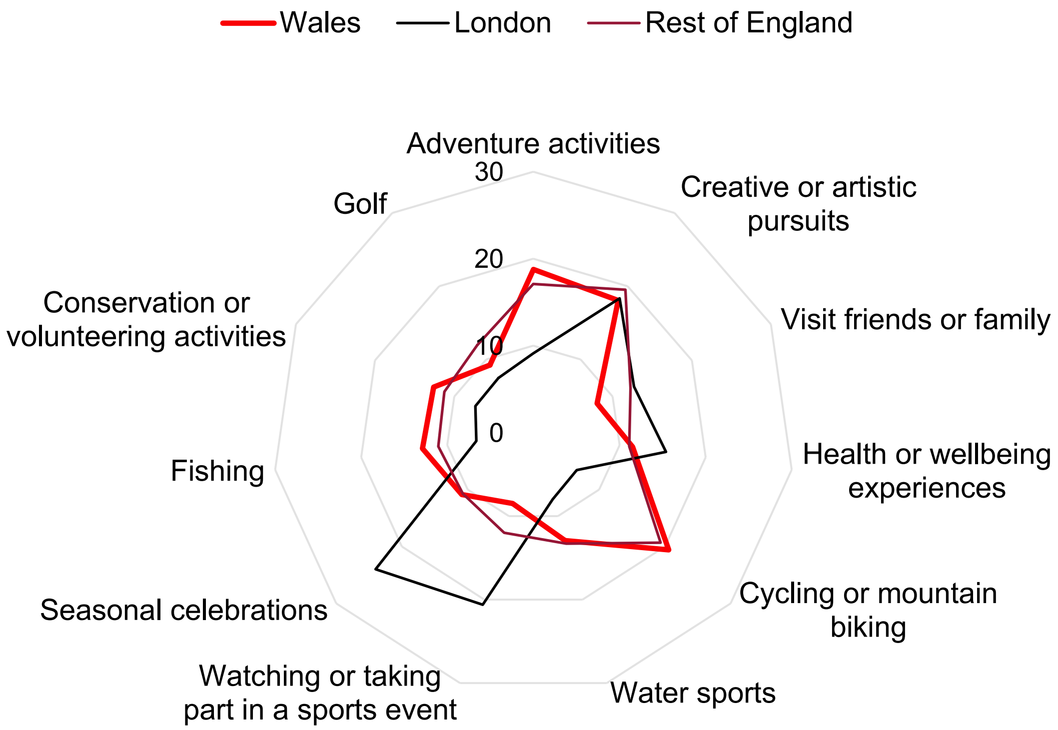
Destination associations – trip experiences

- London dominates as a destination associated with 'seasonal celebrations' and 'watching or taking part in a sport event'.
- Scotland, Wales and Ireland share similar associations, but Scotland followed by Ireland have stronger associations than Wales, especially for 'adventure activities' and 'fishing'.

Figure 46. Destinations most strongly associated with each trip experience*, Bottom 11 in order of importance, All respondents



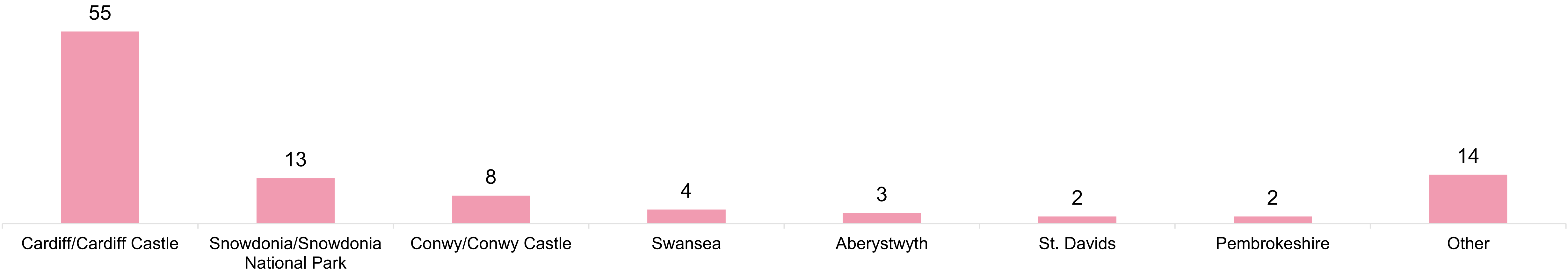
D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,000
*Ordered clockwise in order of importance to German market

Places for holidays or short breaks in Wales

- When asked to name places in Wales associated with holidays and short breaks, only a small proportion of the German holiday market were able to name specific places.
- They were most likely to think of Cardiff and Cardiff castle (55% of all mentions), followed by Snowdonia/Snowdonia National Park (13%) and Conwy/Conwy Castle (8%)

Figure 47. Specific places associated with Wales, Percentage of mentions, All respondents that could name a place in Wales

Nothing in particular comes to mind	65%
Don't know/not sure	12%



E2. When you think of Wales as a place to take holidays and short breaks, which specific places come to mind? All data weighted. Base: All respondents n=1,000
Note: All responses under 1% are combined into 'other'.

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BVA BDRC

Appeal of Wales as a place to visit

- When asked to describe what is most appealing about Wales as a holiday destination, the majority of the German market reported that nothing in particular came to mind. However, of those that could, areas of natural beauty and culture/heritage were the most prevalent. Notably, a small proportion of respondents mentioned ‘the language’ and ‘the people’.

Figure 48. Most appealing about Wales as a holiday or short break destination, All respondents

Nothing in particular comes to mind	55%
Don’t know/not sure	16%

E2b. What would you say is most appealing about Wales as a holiday or short break destination?
Base: All respondents n=1,000

Future visits to Wales

Trips intended to Wales in next few years

- 74% of the German market show some level of interest in visiting Wales in the next few years.
- 7% of the German market state they have already booked a holiday or short break in Wales in the next few years. Just over a quarter (26%) are 'very interested – but have not yet booked'.
- 16% of the German market that are interested in taking a Wales trip state they are planning on doing so in 2023, with the vast majority planning their trip from 2024 onwards.

Figure 49. Wales trip intended in the next few years, Percentage, All respondents

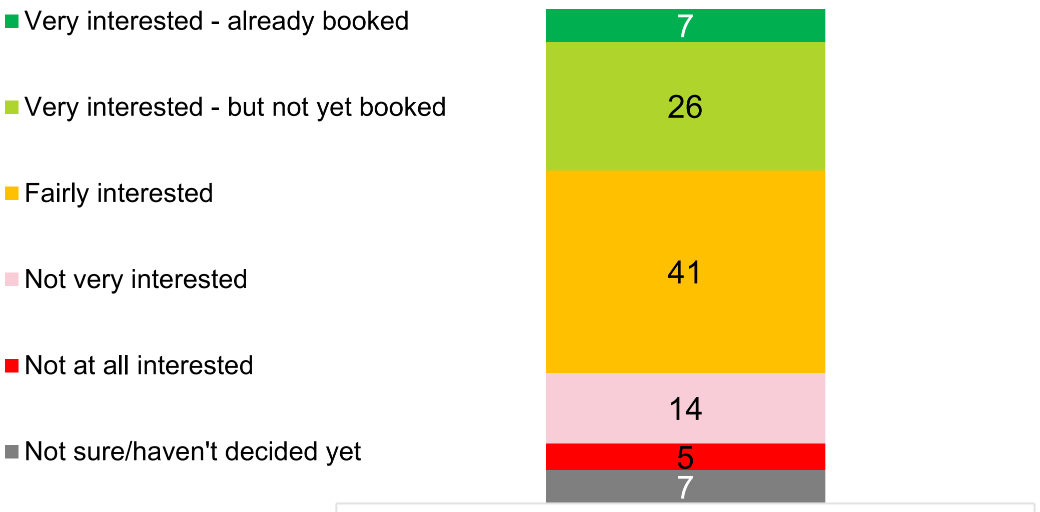
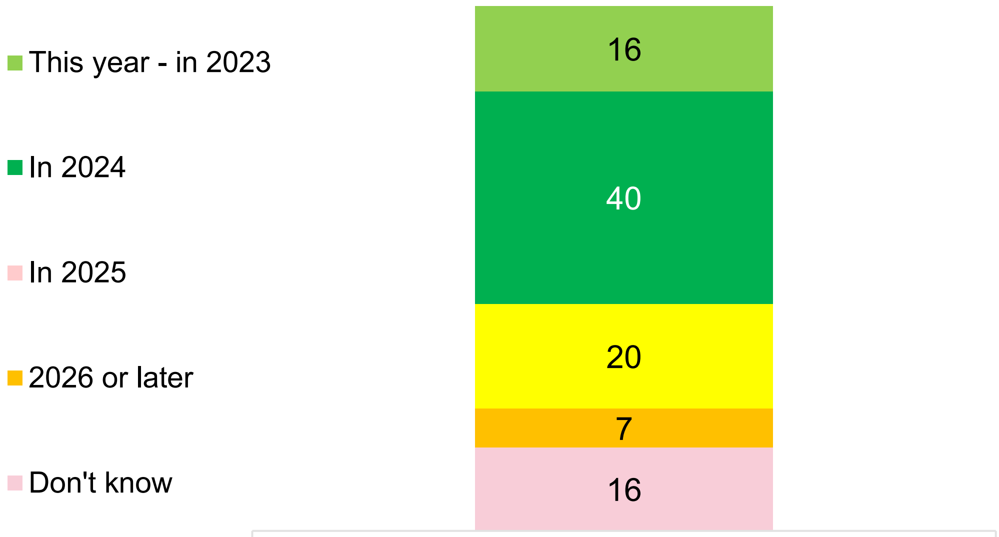


Figure 50. When planning to take a Wales trip in the next few years, Percentage, All Wales trip intenders



F1. How interested, if at all, would you be in taking a holiday or short break in Wales in the next few years?
F2. And when are you next most likely to visit Wales for a holiday or short break? All data weighted.
Base: All respondents n=1,000. All Wales trip intenders n=737.

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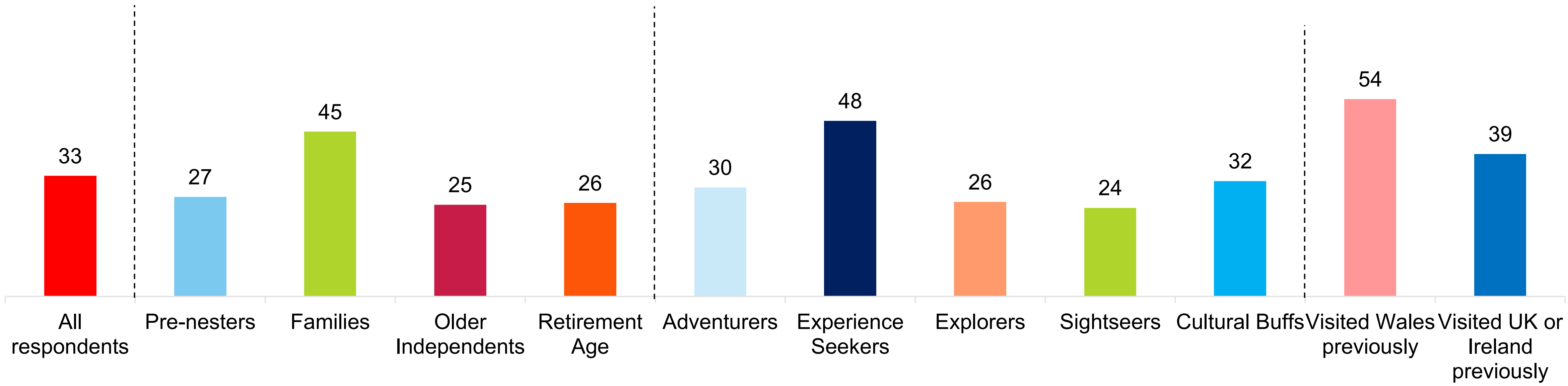
Welsh Government

Trips intended to Wales in next few years – by sub-group

- Families are the life stage most likely to be ‘very interested’ in taking a Wales holiday/short break in the next few years – with nearly half (45%) reporting this. The proportions of pre-nesters, older independents and retirees expressing strong interest in a future Wales trip are similar across the groups – approximately 1 in 4 state they are ‘very interested’.
- Experience Seekers are the segment most likely to be ‘very interested’ in taking a Wales holiday/short break in the next few years – with 48% intending to do so.
- Members of the German holiday market that had visited Wales previously are more likely to report being ‘very interested’ in visiting Wales in the next few years, compared to those that hadn’t. Those who had previously visited the UK or Ireland are marginally more likely to do so.

Figure 51. Very interested in visiting Wales in next few years by sub-group, Percentage, All respondents



F1. How interested, if at all, would you be in taking a holiday or short break in Wales in the next few years? All data weighted.
Base: Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126; Adventurers n=264; Experience Seekers n=214; Explorers n=232; Sightseers n=105; Cultural Buffs n=185; Visited Wales before n=310; Visited UK before n=718

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Trip length and months intending to take a trip in Wales

- Anticipated overnight visits to Wales from the German market are at their highest in the peak summer months – nearly half (47%) plan on visiting between June and August, with relatively equal intention within each of these months. Off-peak trips to Wales are of limited interested to the German market.
- The majority (53%) of anticipated overnight trips to Wales are stays of 4-7 nights, although around 3 in 10 (28%) anticipate a longer break of 8+ nights.

Figure 52. Months intending to take next trip in Wales, Percentage, All Wales trip intenders

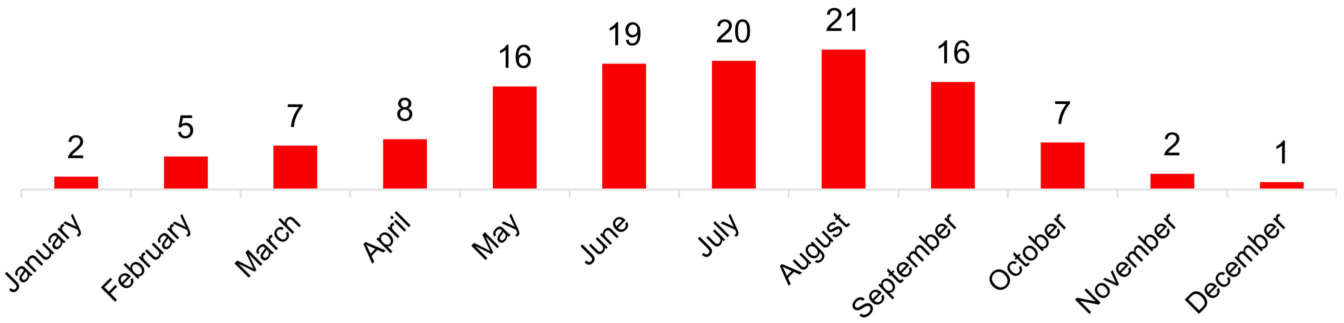
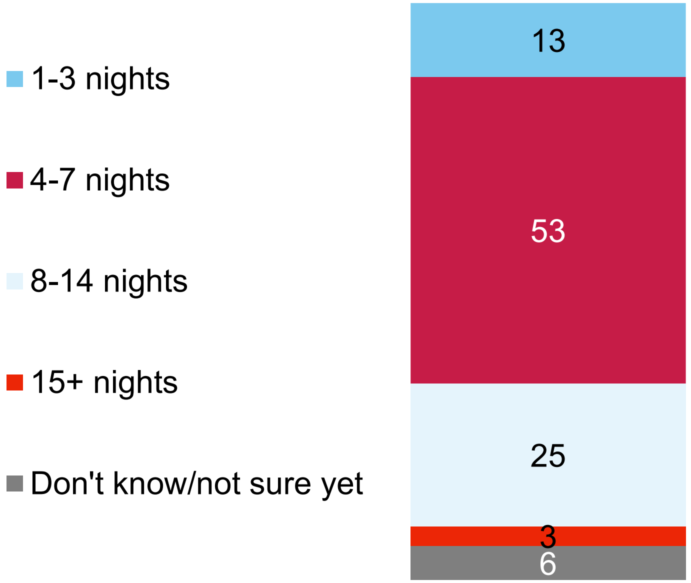


Figure 53. Trip length of next intended Wales trip, Percentage, All Wales trip intenders



F3. In which, if any, of these months of the year do you anticipate taking your next overnight trip in Wales?
F4. Roughly how many nights do you anticipate spending on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=737

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Visitor party make-up for next Wales trip

- Over half (55%) of Wales trip intenders plan on visiting Wales with their partner, with just over a quarter (27%) likely to do so with their children or grandchildren. Nearly 1 in 4 (23%) plan on travelling with friend/s.
- Nearly half (45%) of German intenders expect to travel to Wales 'independently', with 2 in 5 (38%) anticipating travelling 'as part of an escorted or organised tour with a travel company' and 1 in 6 (17%) 'as part of an organised group'. Retirees are the least likely to travel independently - 69% anticipate travelling as part of a group, compared to 56% of older independents, 53% of families and 48% of pre-nesters. 'Explorers' and 'Sightseers' also exhibit greater preference for group travel.

Figure 54. Visitor party make-up for next Wales trip, Percentage, All Wales trip intenders

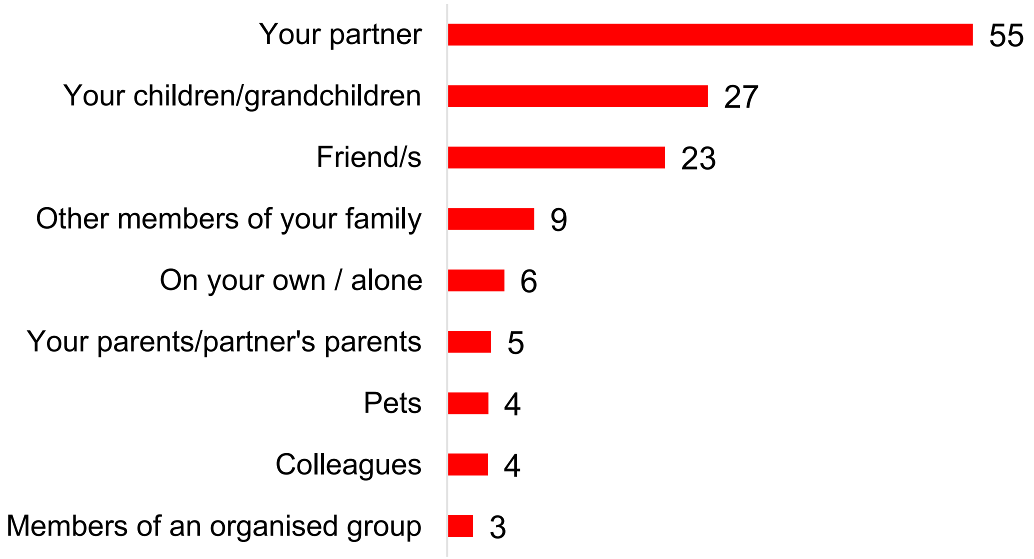
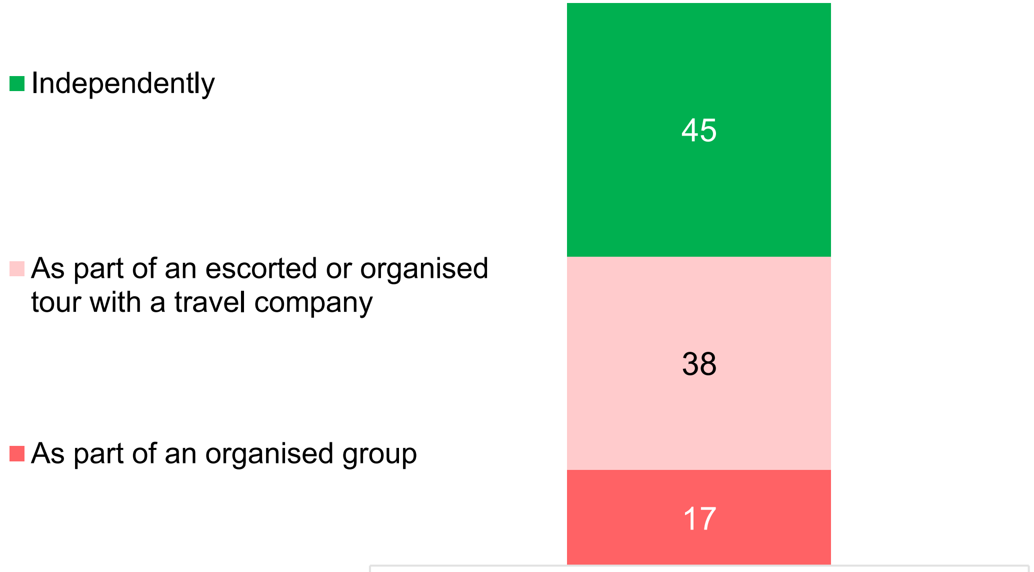


Figure 55. Likely company on your next overnight trip in Wales, Percentage, All Wales trip intenders

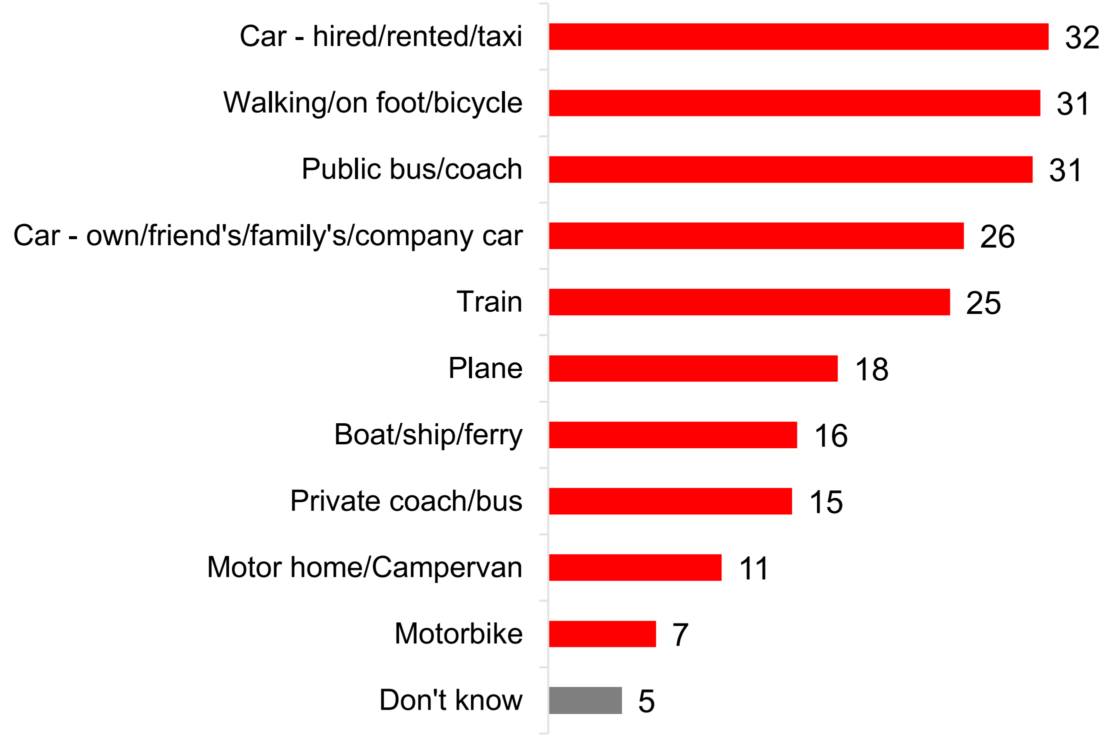


F5. Who, if anyone, is likely to accompany you on your next overnight trip in Wales?
F5b. Which of the following best describe how you are most likely to travel around Wales on your next overnight trip there? Don't knows removed All data weighted.
Base: All Wales trip intenders n=737

Intended ways to travel during next Wales trip

- Wales trip intenders from Germany are mostly likely to travel around Wales in a 'car – hired/rented/taxi' (32%), 'walking/bicycle' (31%) and 'public bus/coach' (31%). This indicates a relatively strong demand for public transport (43%).
- Families are more likely to travel around via 'plane' and 'motor home/campervan' than other life stages.
- Sightseers are more likely to travel via 'train' than other segments.

Figure 56. How travel around for next Wales trip, Percentage, All Wales trip intenders



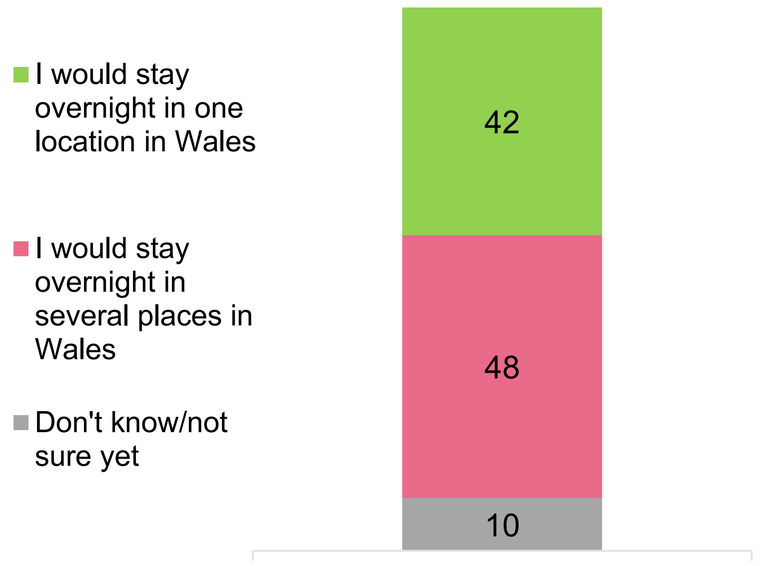
Net: Public transport 43%

F12. How are you most likely to travel around Wales on your visit? All data weighted.
Base: All Wales trip intenders n=737

Anticipated destination for next Wales trip

- Mid Wales is the region of Wales likely to attract the highest number of overnight visits from German enquirers (with a third of potential trip takers expecting to stay there there), followed by South West Wales (at 27%).
- Of those planning on staying overnight in Wales, 42% of visitors from Germany plan on staying in one location on their trip and just under half (48%) would stay overnight in several places.
- Older life stages are more likely to stay overnight in several places in Wales.

Figure 57. Type of trip intended on next Wales trip, Percentage, All Wales trip intenders



F7. Which of these areas do you plan on staying overnight on your overnight trip in Wales? F6. Which of the below best describes the number of places you are likely to stay in on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=737

Intent to visit elsewhere in UK or Ireland

- Of those that currently know, almost 3 in 5 (59%) of Wales trip intenders from Germany intend to stay elsewhere in the UK and Ireland as well as staying in Wales – slightly more intend to do so after their trip to Wales than before (38% vs. 26%). On average, Wales intenders are considering visiting two parts of the UK in addition to Wales - the majority (56%) of these individuals intend to stay in London, although there is also a strong intention to visit Scotland, the Rest of England and Ireland.

Figure 58. Intention to visit elsewhere in UK or Ireland as part of the same trip, Percentage, All Wales trip intenders

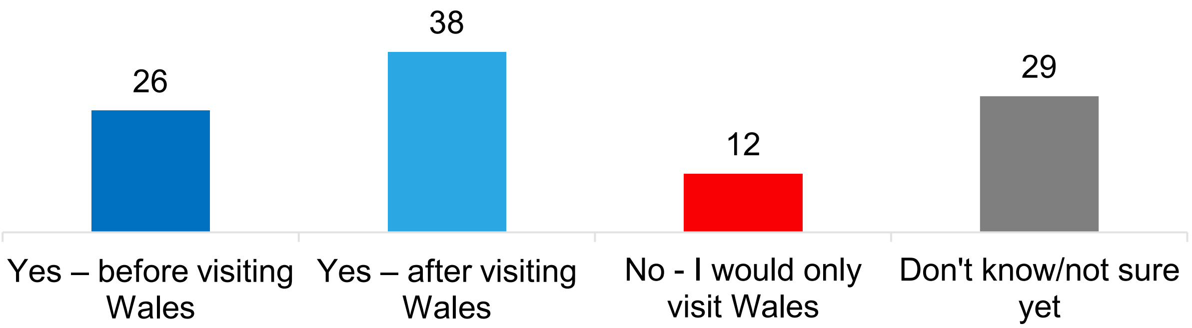
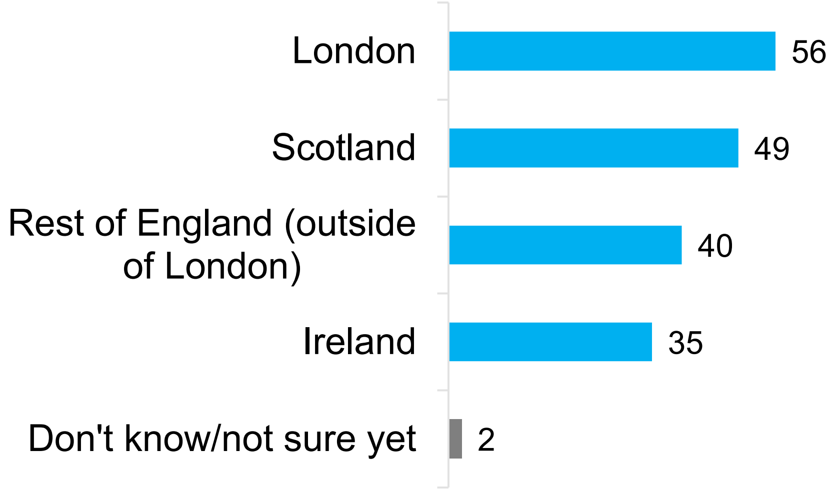


Figure 59. Where else intended to stay in UK or Ireland, Percentage, All Wales trip intenders anticipated to stay elsewhere



F13. Would you anticipate staying overnight in any other parts of the UK or Ireland as part of your trip to Wales?
F14. Where else in the UK or Ireland would you anticipate staying overnight on this trip? All data weighted.
Base: All Wales trip intenders n=737

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Destination preference for next Wales trip

- The most popular destination types are ‘historic or heritage town’, ‘scenic countryside or village’, ‘wilderness and nature’ and ‘scenic coastline or harbours’. Intentions to visit cities or large towns and traditional seaside resorts are lower.
- Older independents and retirees are more likely to favour staying in a ‘historic or heritage town’ and a ‘scenic countryside or village’. Families are more likely to plan on staying in a ‘traditional seaside resort’, ‘large resort hotel’ or ‘holiday village/centre’.

Figure 60. Type of destination of those intending to take a trip in Wales, Percentage, All Wales trip Intenders

F8. Which of the following best describes the main types of destination you are likely to stay in during your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=737

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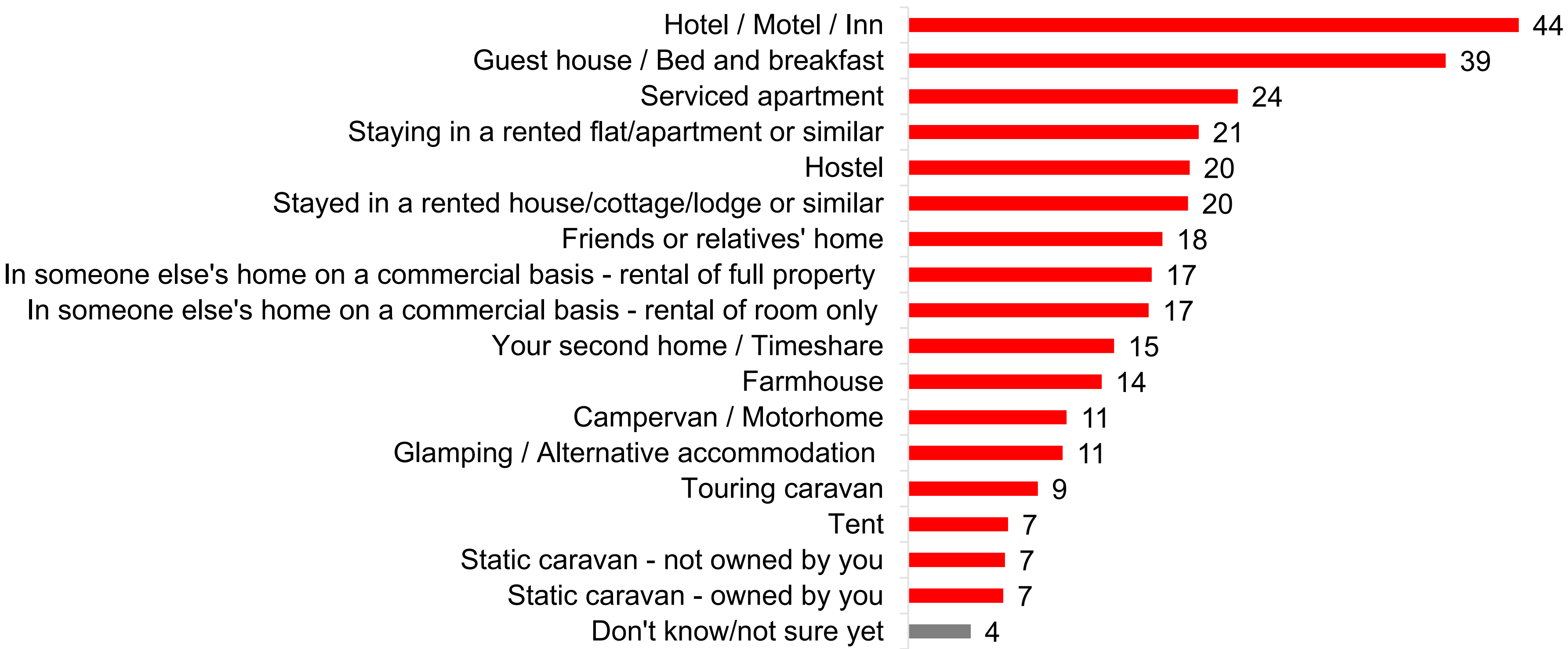
Welsh Government

Accommodation planning to stay in during next Wales trip

- ‘Hotels or motels’ are the most likely accommodation amongst Wales trip intenders (with 44% planning on staying in this category) followed by ‘guest house/B&B’ (at 39%). A range of other accommodation types were also chosen, including ‘serviced apartment’ (24%), ‘rented flat/apartment’ (21%) and ‘hostel’ (20%). Wales trip intenders have a relatively low level of interest in caravan and camping.

Figure 61. Accommodation planning to stay in during next Wales trip, Percentage. All Wales trip intenders

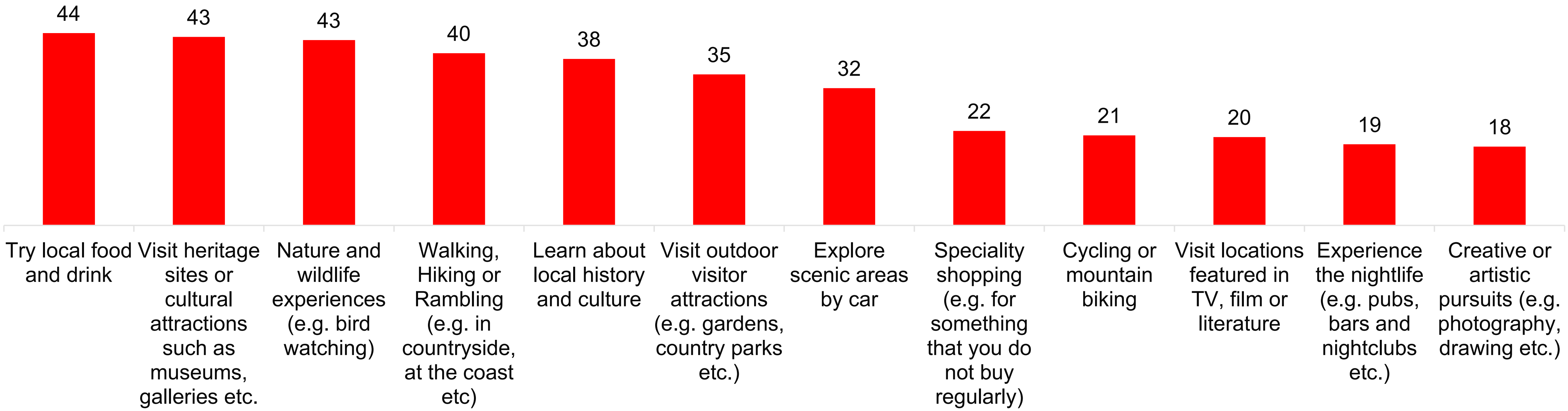


F9. What type/s of accommodation would you be most likely to stay in on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=737

Activities likely on NEXT Wales trip

- ‘Trying local food and drink’ is the leading activity likely to be undertaken by future visitors from Germany to Wales, followed by ‘visiting heritage sites or cultural attractions’, ‘nature and wildlife experiences’ and ‘walking, hiking or rambling’.
- Indicatively, retirees are more likely to be interested in ‘learning about local history and culture’ and ‘visiting outdoor visitor attractions’ than other life stages.

Figure 62. Top 12 activities of those intending to take a trip in Wales, Percentage, All Wales trip Intenders



F10. Which, if any, of these activities are you likely to do on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=737

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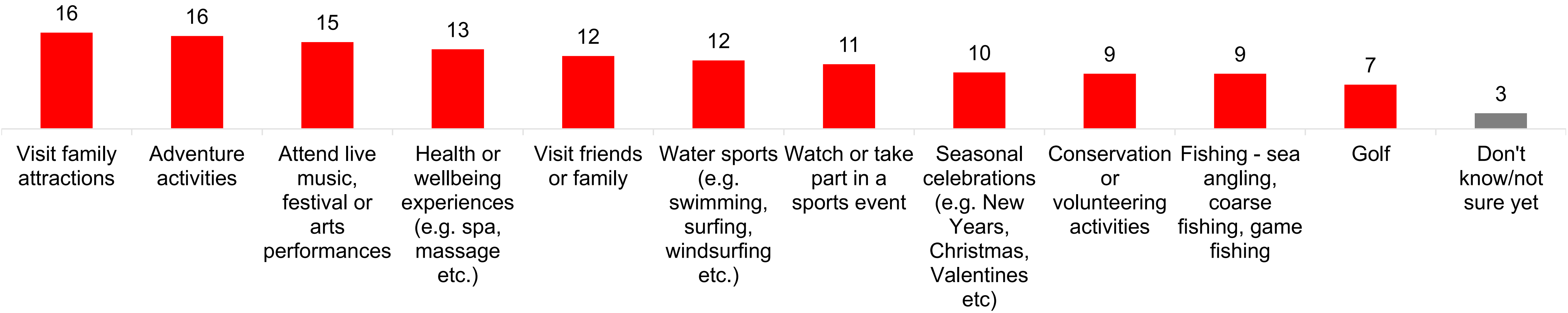
Activities likely on NEXT Wales trip

- A number of other activities appeal to the German holiday market, albeit at a more niche level. Examples include ‘visiting family attractions’, ‘adventure activities’ and ‘attending live music, festival or arts performances’. ‘Golf’, ‘fishing’ and ‘conservation and volunteering’ are the least likely activities to be undertaken on future overnight trips to Wales.

Figure 63. Bottom 11 activities of those intending to take a trip in Wales, Percentage, All Wales trip Intenders



F10. Which, if any, of these activities are you likely to do on your next overnight trip in Wales? All data weighted.
Base: All Wales trip intenders n=737

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Interest in attending festivals or events in Wales

- There is strong general interest in festivals/events in Wales amongst trip intenders. Intenders are most likely to report that they would be very interested to attend a 'food and drink festival', 'live music festival' , 'cultural/literary/arts festival' and 'local produce event'.

Figure 64. Interest in festivals/events of those intending to take a trip in Wales, Percentage, All Wales trip Intenders

F11. How, if any, of the below types of festivals or events would you be very interested in attending whilst on your next overnight trip to Wales? All data weighted.
Base: All Wales trip intenders n=737

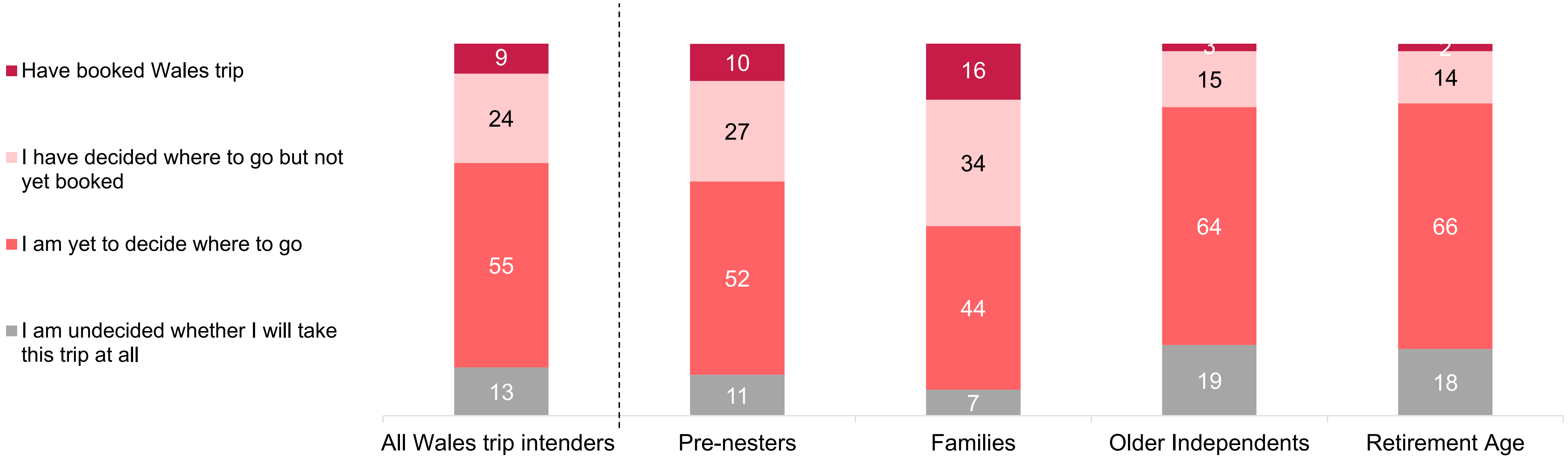
Back to contents

Future planning and booking to Wales

Booking status of next Wales trip

- Around a quarter (24%) of the German holiday market that are likely to take an overnight trip to Wales in the next few years have ‘decided where to go but not booked yet’, with over half ‘yet to decide where to go’
- Families are most likely to have already made decisions as to where they will go. Older independents and retirees are the least likely to have booked or decided where to go.

Figure 65. Booking status of next Wales trip, Percentage, All Wales trip intenders

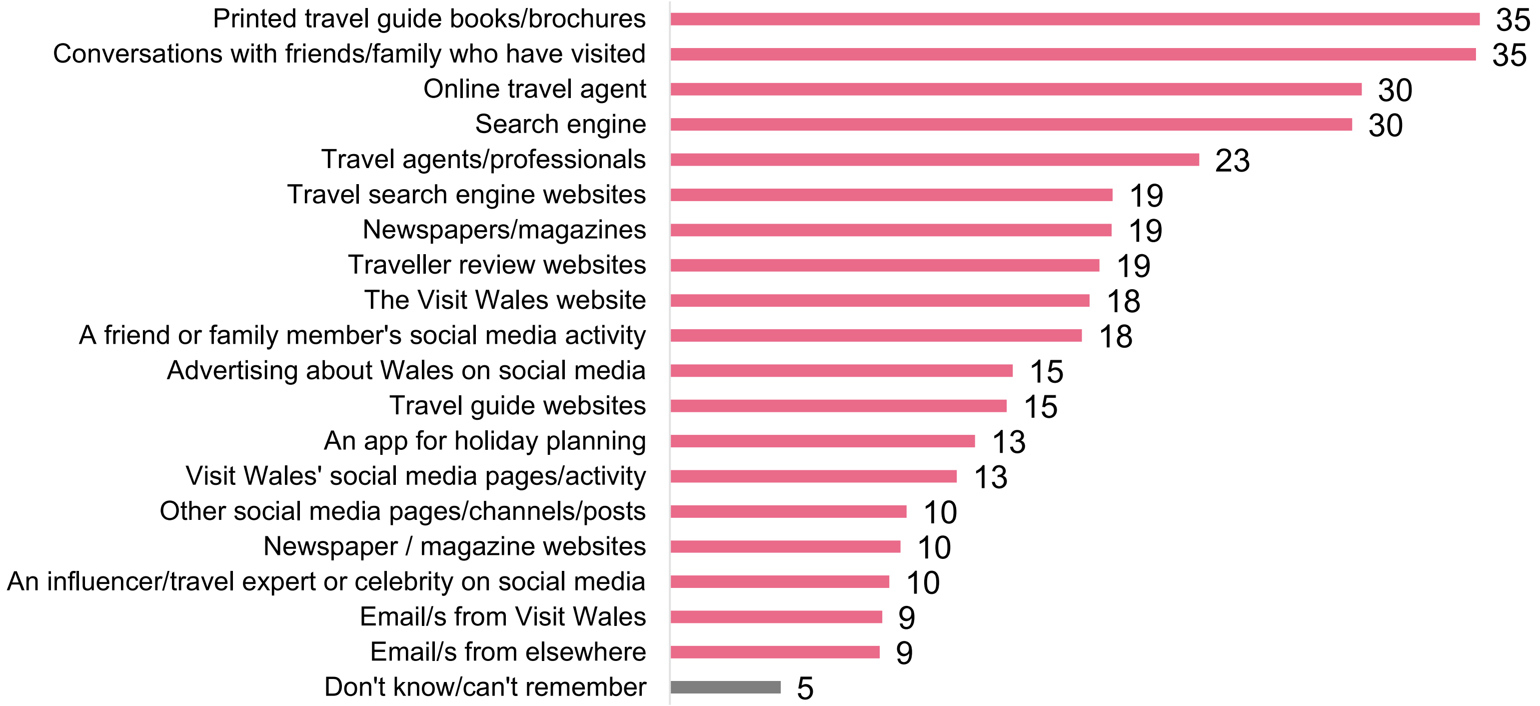


F15. Which of the following best describe how close you are to booking your next overnight trip to Wales? All data weighted.
Base: All Wales trip intenders n=670. Pre-nesters n=93; Families n=247; Older Independents n=245; Retirees n=85

Sources of information to use when taking a trip in Wales

- trip takers to Wales are likely to use a range of sources to plan their next trip/s – printed travel guide books/brochures and conversations with friends are the most commonly reported influences.
- 'Conversations with friends/family who have visited' is a popular information source across all life stages. 'The Visit Wales website' is more popular among older independents. 'A friend or family member's social media activities' is more popular among families, as are 'travel guide websites' among pre-nesters.

Figure 66. Sources of information used/likely to use of those intending to take a trip in Wales, Percentage, All Wales trip Intenders



F16. Which, if any, of these information sources are you likely to or have you already used to plan your next trip/s to Wales? All data weighted.
Base: All Wales trip intenders n=737

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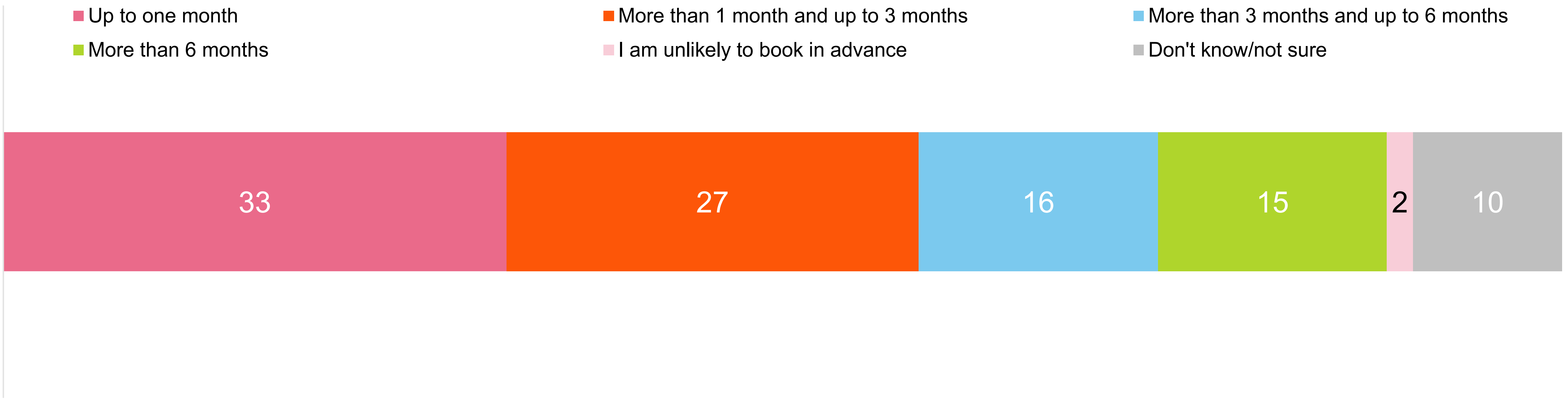
Time period between booking next Wales trip and the first day of trip

- 1 in 3 (33%) German intenders anticipate booking their next Wales trip within 1 month of the travel date, with a further 1 in 5 (27%) expecting to do so 1 to 3 months before the travel date. Only 3 in 10 (31%) would expect to book the trip more than 3 months in advance of the trip

Figure 67. Time period between booking next Wales trip and the first day of trip, Percentage, All Wales trip Intenders



F17. Roughly how much time is there likely to be between you booking your next Wales trip and the first day of your trip?
All data weighted.
Base: All Wales trip intenders n=737

Wales trip booking behaviour

- Nearly 2 in 5 Wales trip intenders will book some, but not all elements of their trip together – this is driven largely by families. Only 1 in 5 will book most or all elements as one package and this is driven by retirees.
- 29% of trip intenders will book all elements of their trip separately.
- Trips to Wales are most likely to be booked via an 'online only travel agent or tour operator' (22%), closely followed by a 'price comparison site' (20%).

Figure 68. Ways to book the main elements of next Wales trip, Percentage, All Wales trip intenders

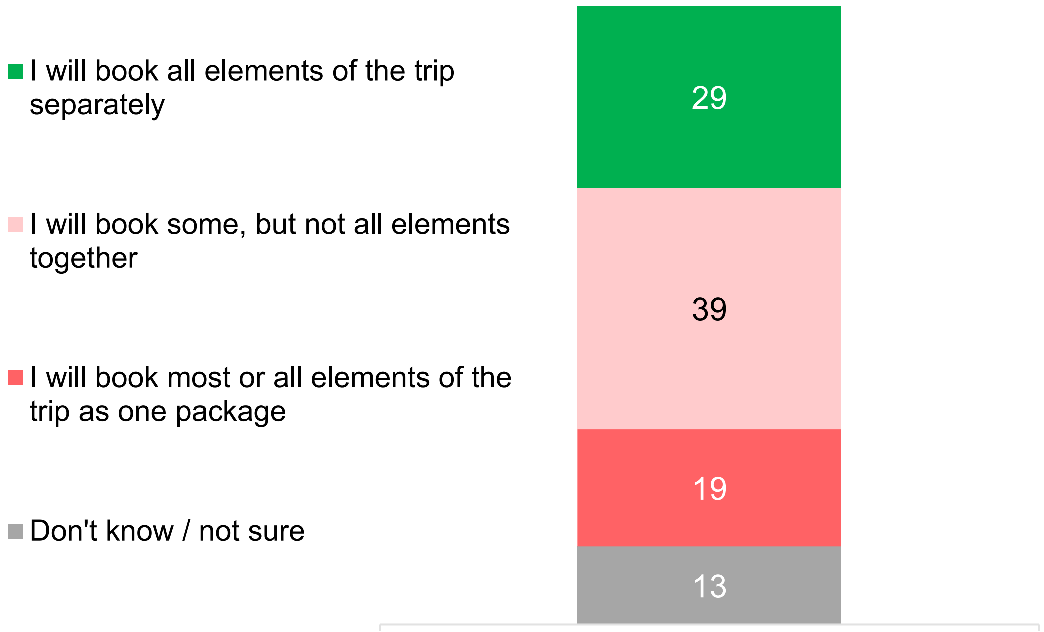
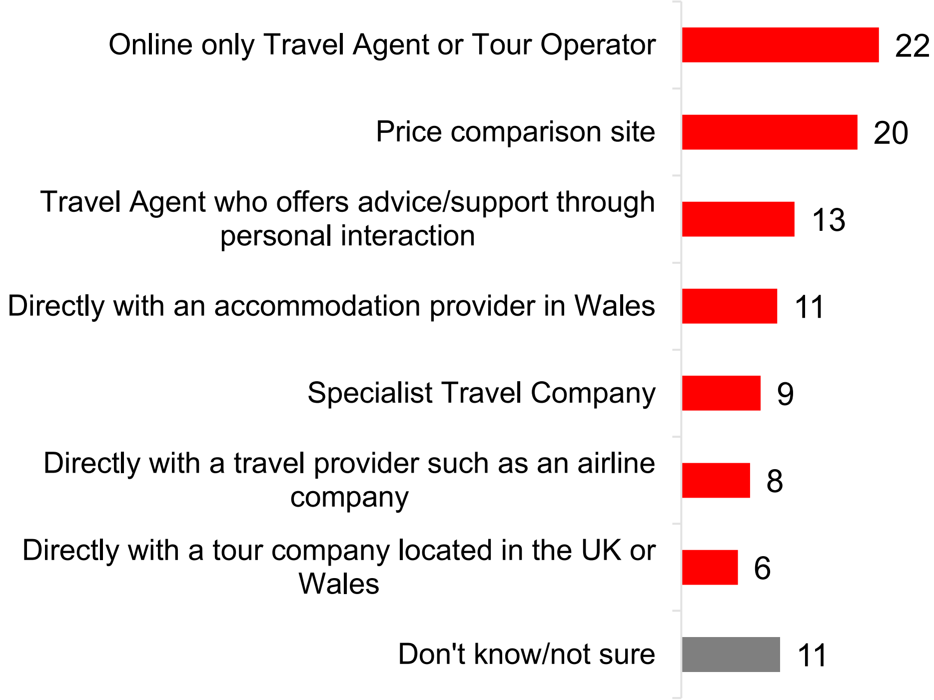


Figure 69. Booking channel for next Wales trip, Percentage, All Wales trip intenders



F17b. How are you most likely to book the main elements of your next Wales trip including travel and accommodation?
F18. And with whom are you most likely to book your trip? All data weighted.
Base: All Wales trip intenders n=737

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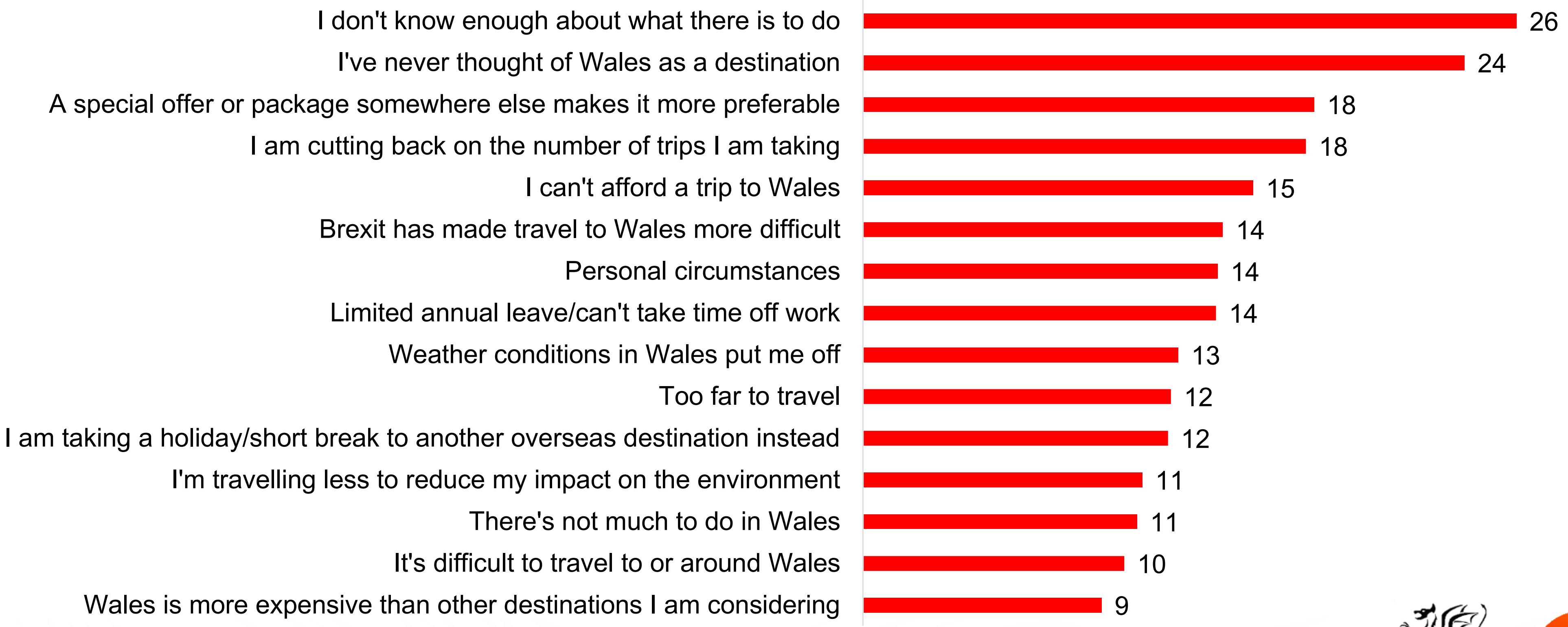
Non-intenders to Wales

Reason for not visiting Wales in the next few years

- Lack of awareness and knowledge are the leading drivers for not visiting Wales in the next few years.
- When looking specifically, the leading reason the German holiday market gave is ‘I don’t know enough about what there is to do’, with 26% stating this. A range of other reasons were also mentioned, including ‘I’ve never thought of Wales as a destination’ (24%), ‘a special offer or package somewhere else makes it more preferable’ (18%) and ‘I am cutting back on the number of trips I am taking’ (18%).

Figure 70. Top 15 reasons for not visiting Wales for a holiday or short break in next few years, Percentage, All non-intenders to Wales



F19. What are the reasons that you are not planning to visit Wales for a holiday or short break in the next few years? All data weighted.
Base: All Wales non-intenders n=263

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Other destination considerations amongst non-intenders to Wales

- Of the people who said they are not intending to visit Wales in the next few years, 56% are seriously considering a holiday or short break to London. There are also sizeable levels of intent to visit Ireland, Scotland and the Rest of England.
- A minority are likely to take a day trip to Wales when on a vacation elsewhere in the UK in the next few years.

Figure 71. Other destination visiting intentions by non-intenders to Wales, Percentage, All non-intenders to Wales

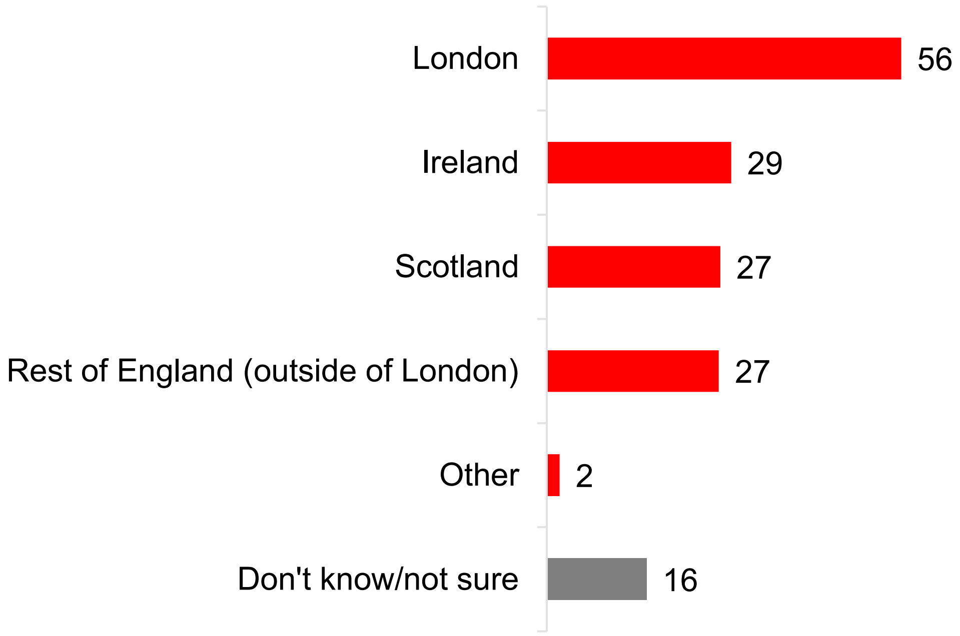
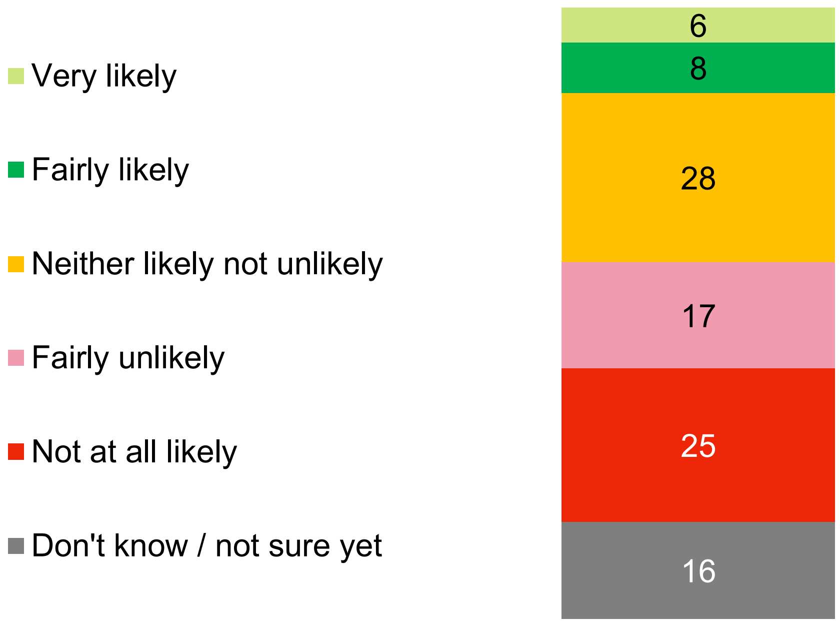


Figure 72. Wales day trip visiting intentions by non-intenders to Wales, Percentage, All non-intenders to Wales



F20. Where, if anywhere, in the UK and Ireland are you seriously considering visiting for a holiday/short break in the next few years? F21. How likely are you to visit Wales for a day trip when on a holiday/short break elsewhere in the UK in the next few years? All data weighted. Base: All Wales non-intenders n=263

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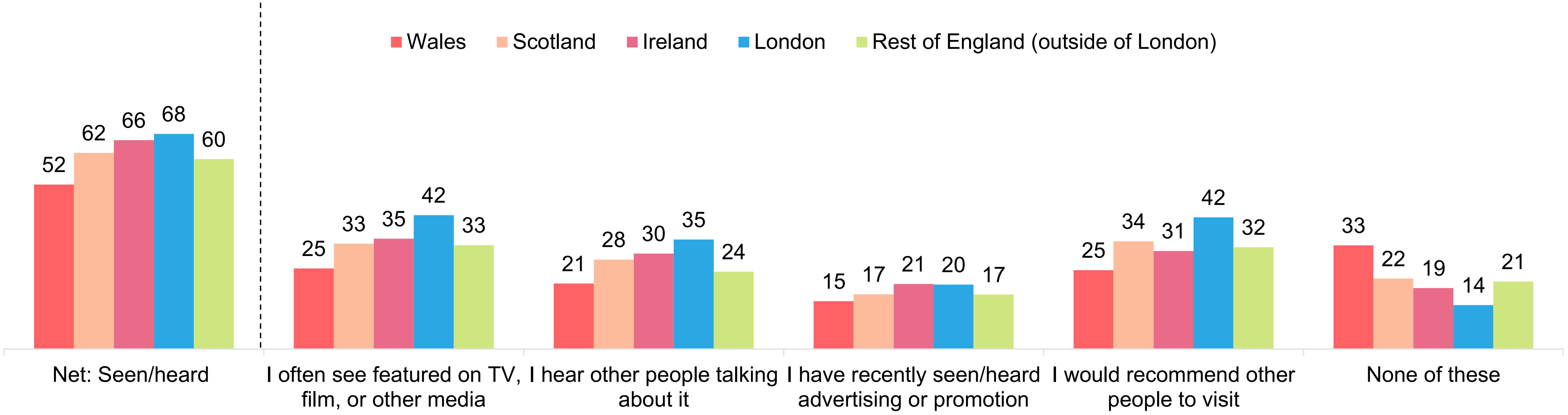
Marketing impact

Ways in which seen/heard about Wales and other destinations

- The German market is less likely to have heard about Wales via the media or other people than the rest of the UK and Ireland. This lower exposure to Wales is seen consistently throughout this report and is accompanied by a lower proportion of the German market who would recommend Wales as a place to visit.
- Over half (52%) of the German holiday market claim to see or hear Wales being featured in the media, being talked about by others or to have recently seen/heard advertising or promotion about it. Wales is most likely to have been seen or heard about on TV, film or other media.
- Those who are ‘very interested’ in visiting Wales are more likely to have engaged with Wales in the media.

Figure 73. Ways in which seen or heard about Wales and other destinations, Percentage, All respondents



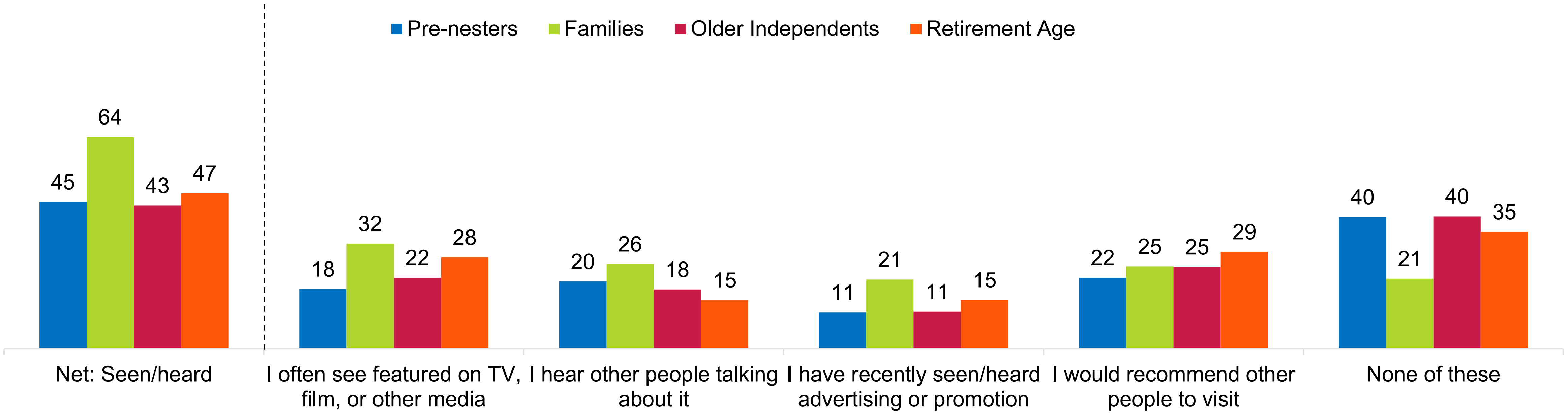
C2. Which, if any, of these statements apply to you and these destinations? All data weighted.
Base: All respondents n=1,000

Llywodraeth Cymru Welsh Government

Ways in which seen/heard about Wales and other destinations

- Families are most likely to have seen/heard about Wales, 64% saying they have done so in some way. 'TV, film or other media' is the most likely source, followed by 'other people talking about it'.
- Families are also more likely to have recently seen advertising or promotion for Wales, heard other people talking about Wales, or seen Wales featured on TV, film or other media, compared to other life stages.

Figure 74. Ways in which seen or heard about Wales by life stage, Percentage, All respondents



C2. Which, if any, of these statements apply to you and these destinations? All data weighted.
Base: All respondents. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

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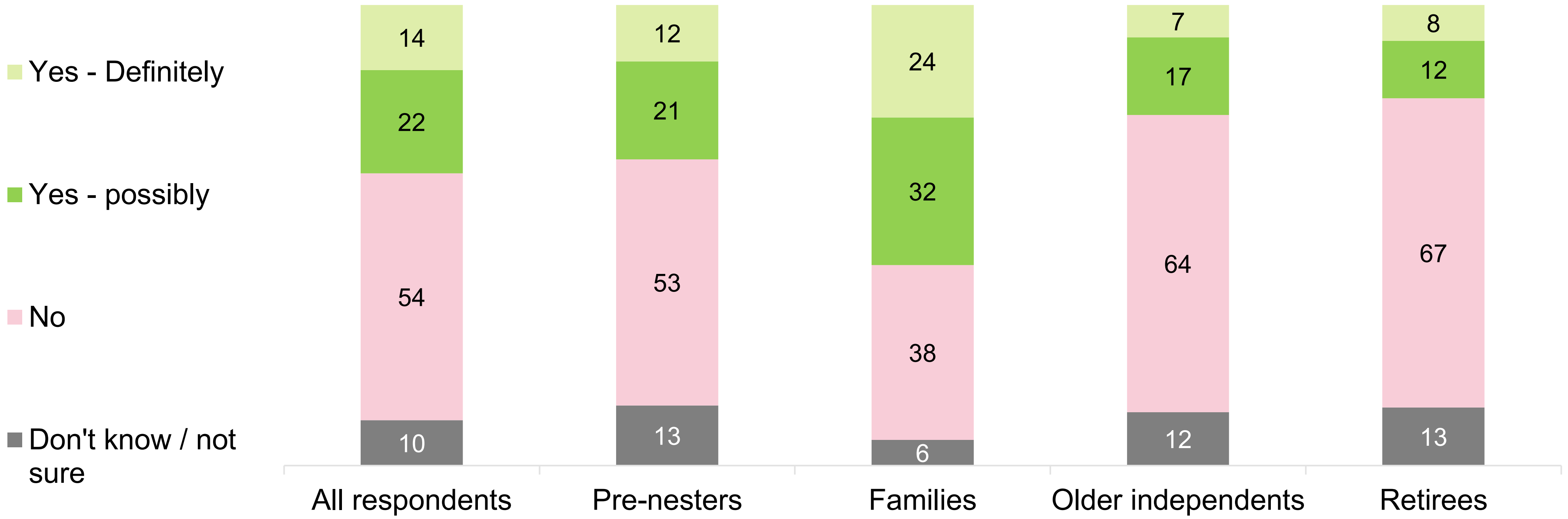
Recall of seen or heard about Wales promotions or marketing

- Just over a third (36%) of the German holiday market 'definitely' or 'possibly' recall seeing promotions or marketing about Wales in the last year or so, rising to 56% of those from a family life stage.
- Over half (54%) do not recall seeing anything, highest amongst older life stages.

Figure 75. Whether recall seeing promotions or marketing about Wales in the last year or so, Percentage, All respondents

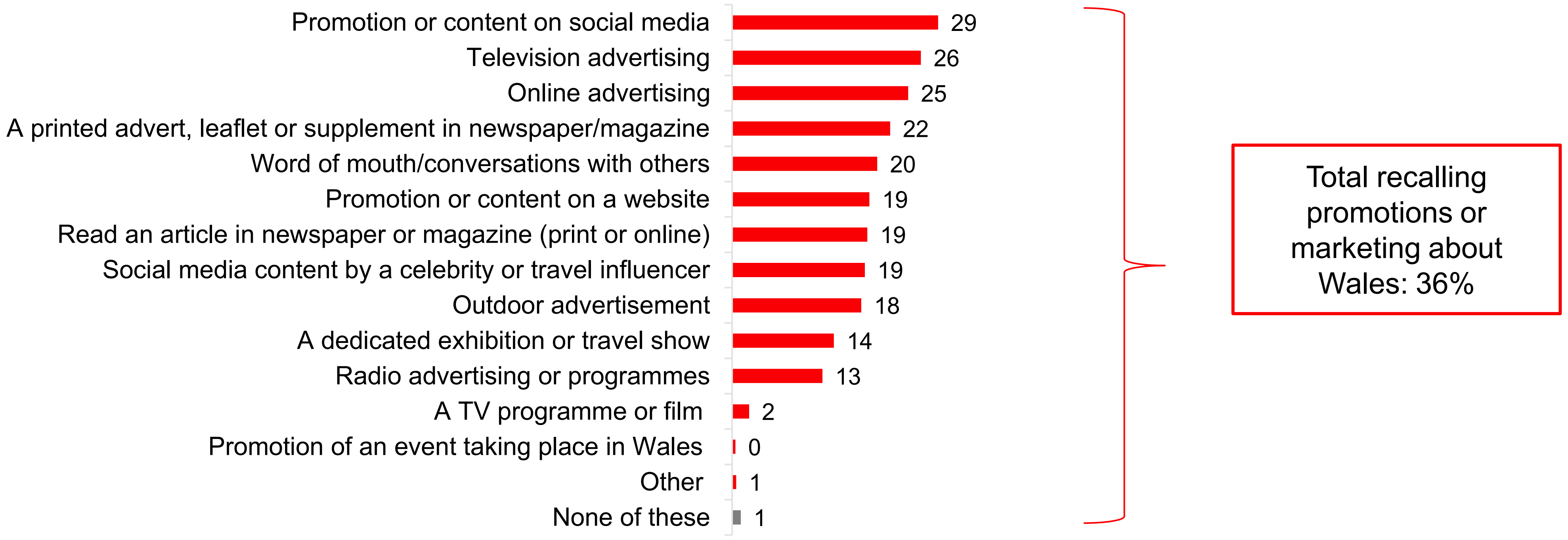


H1. Do you recall seeing any promotions or marketing about Wales in the last year or so? All data weighted.
Base: All respondents n=1,000 Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

Ways in which seen or heard about Wales

- Of the German holiday market who have ‘definitely’ or ‘possibly’ seen promotions or marketing on Wales in the last year or so, they are most likely to recall seeing ‘promotion or content on social media’ (29%), ‘television advertising’ (26%) and ‘online advertising’ (25%).

Figure 76. Engagement with Visit Wales marketing and communications, Percentage, All respondents seen or heard about Wales promotions or marketing



H2. From which, if any, of the following have you seen or heard about holidays or short breaks in Wales in the last year or so? All data weighted. Base: All respondents that have seen or heard about Wales promotions or marketing n=365.

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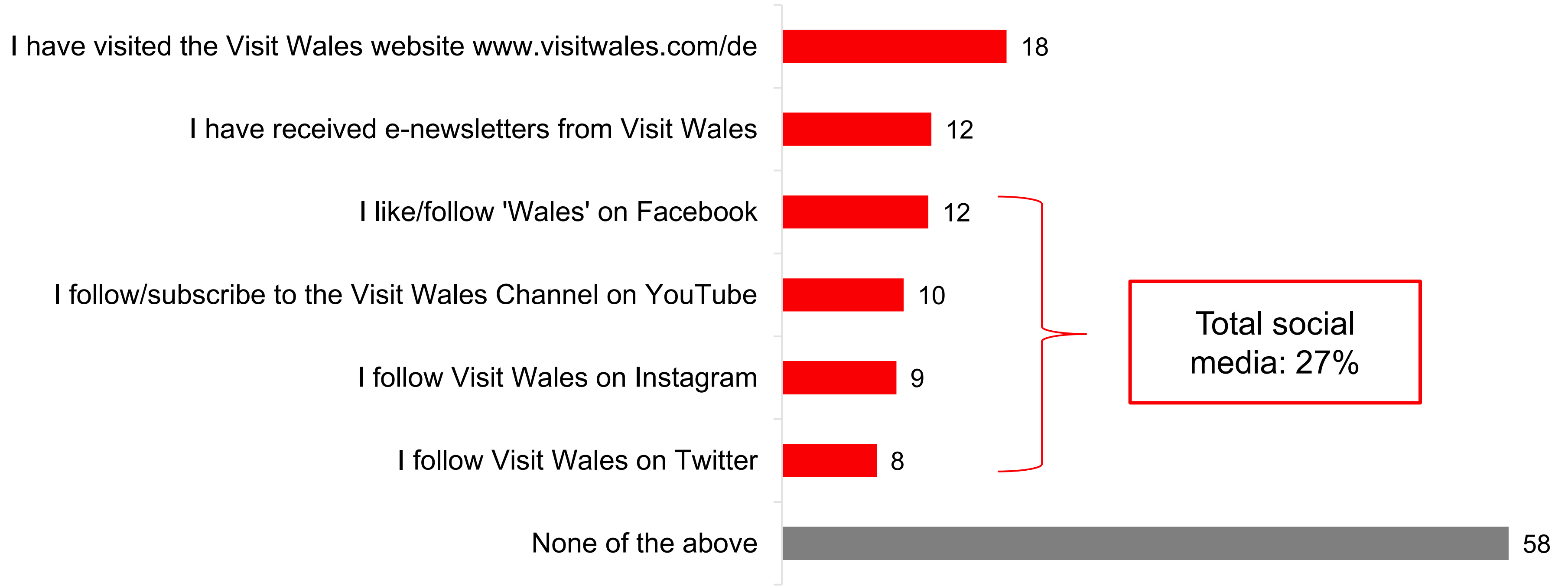
Contact with Visit Wales in last 12 months

- The majority of the German holiday market haven't had any contact with Visit Wales in the last 12 months (58%), although 2 in 5 report having had contact.
- Of the different contact types, just under 1 in 5 (18%) of the German holiday market have visited the Visit Wales website, with 1 in around 1 in 8 having received an e-newsletter. 1 in 4 have engaged with Visit Wales on social media.

Figure 77. Contact with Visit Wales in the last 12 months, Percentage, All respondents

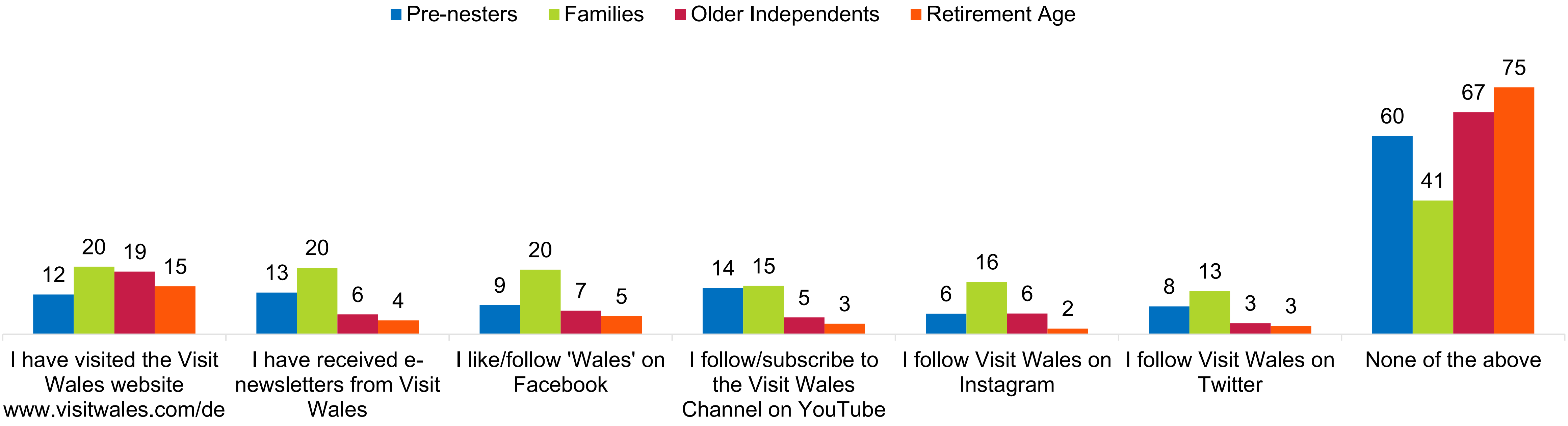


H4. Thinking about all contact you had with Visit Wales in the last 12 months, which of the following apply to you? All data weighted. All respondents n=1,000

Contact with Visit Wales in last 12 months

- Across life stages, families report the strongest engagement with Visit Wales channels, which is unsurprising given their stronger relationship with Wales on other measures. Engagement from retirees and older independents is relatively high with the Visit Wales website but low across other channels.

Figure 78. Contact with Visit Wales in the last 12 months by life stage, Percentage, All respondents



H4. Thinking about all contact you had with Visit Wales in the last 12 months, which of the following apply to you? All data weighted. Pre-nesters n=158; Families n=362; Older Independents n=354; Retirees n=126

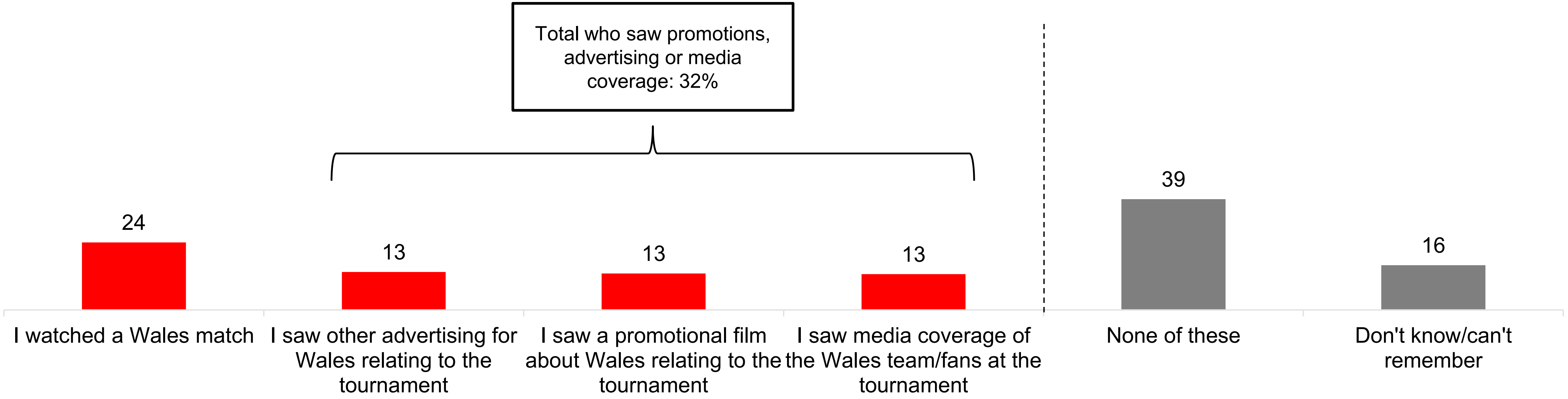
Back to contents

Promotion and Awareness of Wales from Mens' Football World Cup (November 2022)

How much seen about Wales during the World Cup

- Just under a quarter (24%) stated they watched a Wales football match during the Mens' Football World Cup which took place in November to December 2022 (this could have been in person or on TV). A further 32% saw some form of media coverage about Wales.

Figure 79. Wales promotions or coverage in the Men's Football World Cup, Percentage, All respondents

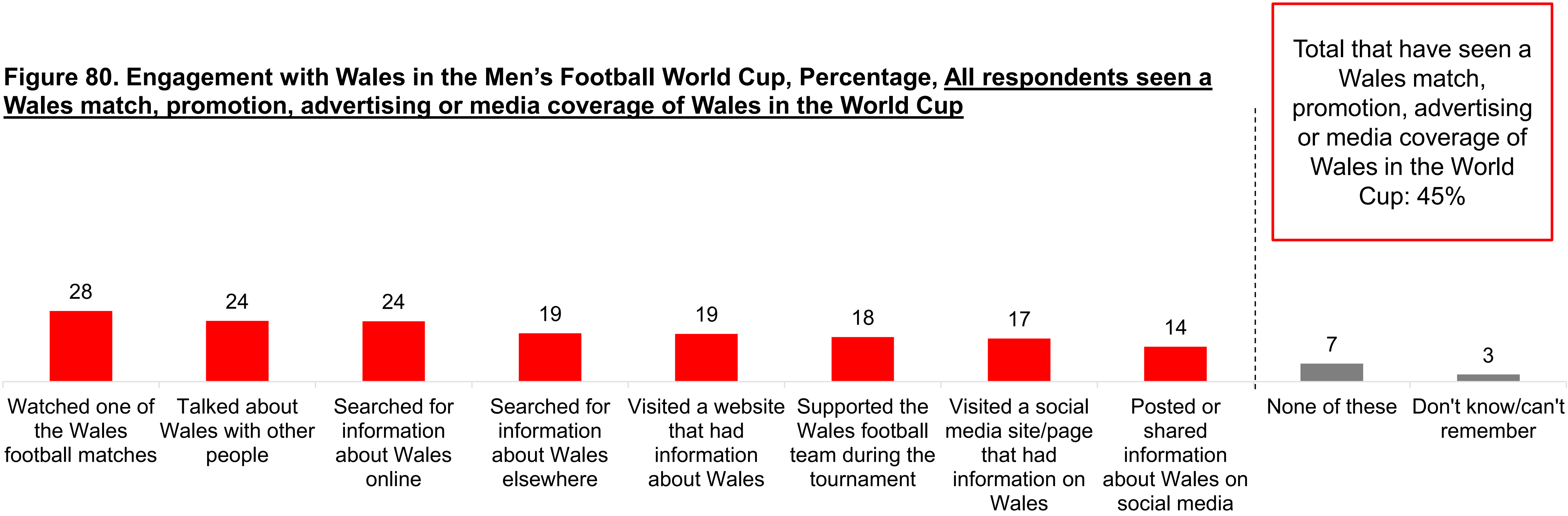


I1. Which, if any, of the following did you see or do in relation to Wales in the Men's Football World Cup? All data weighted.
Base: All respondents n=1,000

Engagement with Wales as a result of promotions

- Those that had seen a Wales match, promotion, advertising or media coverage of Wales in the World cup were asked if they did anything as a result of seeing the promotions or coverage. In total 90% engaged with Wales at some level as a result of watching football coverage or seeing promotions of Wales during the World Cup. 28% watched one of the Wales football matches, 24% talked about Wales with other people and the same number searched for information about Wales online.

Figure 80. Engagement with Wales in the Men's Football World Cup, Percentage, <u>All respondents seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup</u>



I2. Which, if any, of the following did you do as a result of seeing the promotions or coverage of Wales during the World Cup? All data weighted.
Base: All respondents that have seen a Wales match, promotion, advertising or media coverage of Wales in the World Cup n=455

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Welsh Government
Bva BDRC

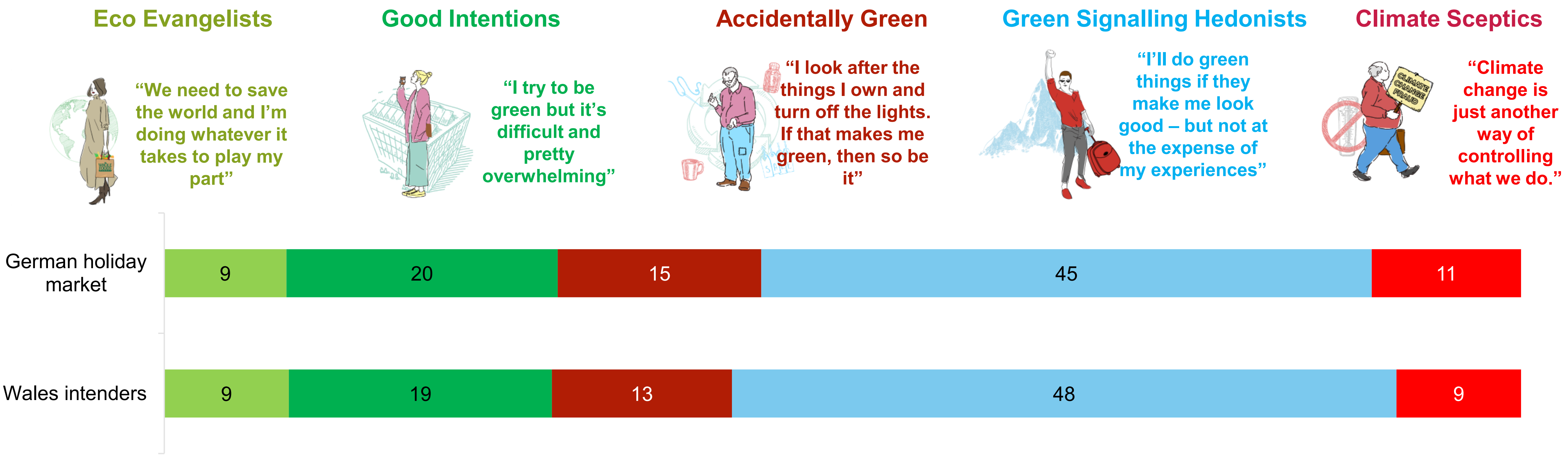
Back to contents

Understanding Attitudes to Sustainability

Breakdown of BVA BDRC sustainability segments

- The largest sustainability segment amongst the German holiday market is ‘Green Signalling Hedonists’ (marginally higher amongst Wales intenders) - a segment that has a ‘superficial interest’ in environmental issues, but not at the expense of their experiences. A notable 3 in 10 are either ‘Eco Evangelists’ or ‘Good Intentions’ – two segments who are passionate about the environment, underlining the importance of tourism organisations communicating their sustainability credentials.

Figure 81. Breakdown of Wales intenders by BVA BDRC sustainability segments

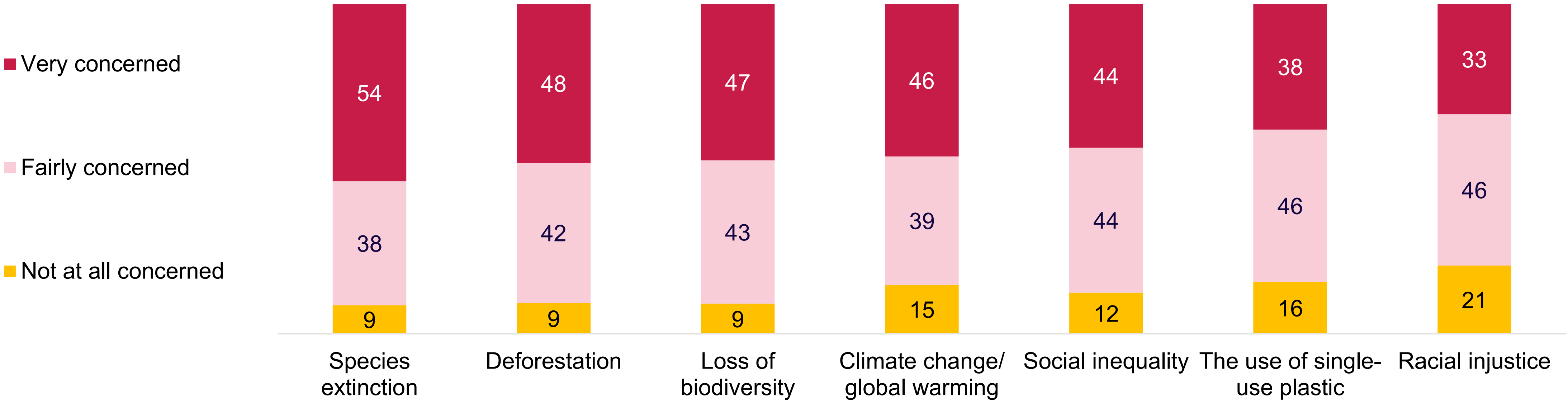


BVA BDRC sustainability segment questions
Base: All respondents n=1,000

Top sustainability issues for the German market

- A wide range of sustainability and equality issues are concerns for the German market, with environmental factors of highest concern. Strong concern about ‘species extinction’ and ‘deforestation’ may pose a threat to air travel from this market.

Figure 82. Sustainability concerns tourism businesses should prioritise, Percentage, All respondents

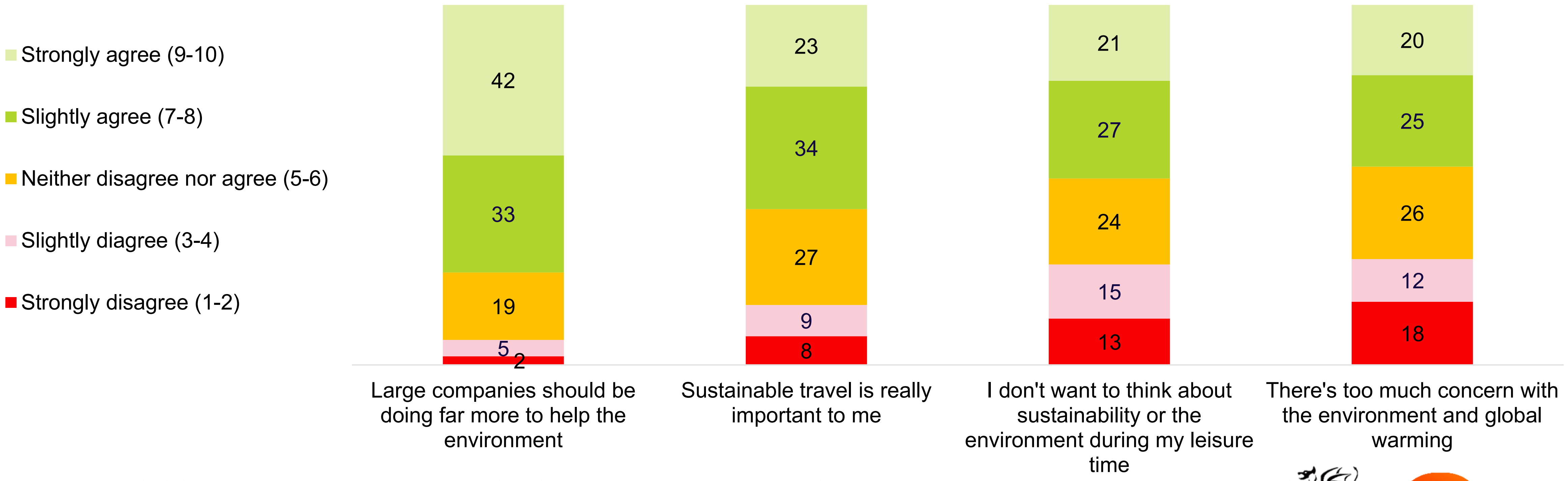


K2a. How, if at all, concerned are you about the following? All data weighted.
Base: All respondents n=1,000

Attitudes to climate change and the environment

- ‘Large companies should be doing more to help the environment’ is the most commonly agreed with sustainability statement from the German holiday market, with three quarters of people ‘strongly’ or ‘slightly’ agreeing with this. Over half also agree that ‘sustainable travel is really important to me’.
- Older independents and retirees are more likely to say they ‘strongly agree’ that large companies should being doing more to help the environment than their younger counterparts. Wales trip intenders are more likely to ‘strongly agree’ with the statement ‘sustainable travel is really important to me’ than any of the other statements.

Figure 83. Attitude to climate change and the environment, Percentage, All respondents



K1. Below are some statements other people have made about climate change and the environment. How much do you agree or disagree with each? (scale of 1-10) All data weighted.
Base: All respondents n=1,000

Individual sustainable actions

- The German holiday market are actively trying to help the environment by switching off heating/electricity, avoiding buying products which are over packaged, and re-using and recycling materials.
- A notable 1 in 4 are flying less or flying shorter distances.

Figure 84. Individual sustainable actions, Percentage, All respondents

K3b. Which of the following are you currently doing to help the environment? All data weighted.
Base: All respondents n=1,000

Appendix 1

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.

	Survey finding of…		
Base	**5 / 95%**	**20 / 80%**	**50 / 50%**
Total Sample (1,000)	+/-1.4%	+/- 2.5%	+/- 3.1%
Pre-nesters (158)	+/- 3.4%	+/- 6.2%	+/- 7.8%
Families (362)	+/- 2.2%	+/- 4.1%	+/- 5.2%
Older Independents (354)	+/- 2.3%	+/- 4.2%	+/- 5.2%
Retirees (126)	+/- 3.8%	+/- 7.0%	+/- 8.7%
Wales trip intenders (737)	+/- 1.6%	+/- 2.9%	+/- 3.6%

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Appendix 2

Destination types associated with selected UK destinations

Table 1. Destinations most strongly associated with each destination type, All respondents considering each destination type

Scenic countryside and villages	Wilderness and nature	Cities and large towns	Historic and heritage towns	Traditional seaside resorts	Scenic coastline and harbours	Mountain adventure	A touring holiday	Holiday village/centre	Large resort hotel
48%	56%	76% London	52%	29% Rest of England	37% Rest of England	49%	36% Rest of England	15% Rest of England	13% London
47%	55%	35% Rest of England	51% Rest of England	16%	34%	37%	32%	12%	13% Rest of England
45% Rest of England	45% Rest of England	31%	51% London	15%	31%	31%	29%	11%	11%
41%	44%	29%	50%	14%	27%	25% Rest of England	26%	11%	10%
14% London	11% London	24%	43%	8% London	12% London	9% London	15% London	10% London	9%

D1. Which, if any, of these places do you most associate with these destination types? All data weighted.
Base: All respondents considering each destination n=1,000

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Destination associations – trip influences

Table 2. Destinations most strongly associated with each trip influence, All respondents

People that are very welcoming	An authentic cultural experience	An environmentally friendly destination	A destination rich in history and heritage	Famous landmarks and visitor attractions	A thriving culture and entertainment scene	Somewhere you can visit at all times of the year	Accommodation with charm and character	Great value for money
34%	London 41%	25%	London 38%	London 45%	London 40%	London 35%	33%	22%
30%	32%	21%	36%	28%	23%	Rest of England 21%	33%	Rest of England 21%
28%	31%	18%	34%	26%	22%	20%	Rest of England 28%	20%
Rest of England 26%	Rest of England 30%	Rest of England 16%	Rest of England 33%	Rest of England 24%	Rest of England 19%	20%	26%	19%
London 25%	25%	London 11%	28%	21%	15%	16%	London 22%	London 17%

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000

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Destination associations – trip influences

Table 3. Destinations most strongly associated with each trip influence, All respondents

High quality accommodation	Lots of activities and things to do	Great places to explore off the beaten track	Incredible scenery and landscapes	Places renowned for their food and drink	Opportunities to explore my hobbies and interests	Opportunities to meet and socialise with other people	Quiet places without crowds of people	Is easy to travel to and get around
London 31%	London 34%	33%	47%	London 24%	19%	London 30%	34%	London 30%
Rest of England 12%	24%	33%	43%	19%	18%	26%	32%	Rest of England 20%
12%	Rest of England 22%	Rest of England 30%	36%	Rest of England 17%	Rest of England 17%	23%	29%	18%
10%	21%	30%	Rest of England 31%	16%	London 16%	23%	Rest of England 24%	17%
10%	19%	London 15%	London 12%	13%	14%	Rest of England 23%	London 10%	15%

D2. Which, if any, of these places do you most associate with each influence? All data weighted.
Base: All respondents n=1,000

Destination associations – trip experiences

Table 4. Destinations most strongly associated with each trip experience, All respondents

Visiting heritage sites or cultural attractions	Visiting outdoor visitor attractions	Visiting family attractions	Learning about local history and culture	Visiting locations featured in TV, film or literature	Exploring scenic areas by car	Conservation or volunteering activities	Creative or artistic pursuits	Health or wellbeing experiences	Trying local food and drink	Attending live music, festival or arts performances	Speciality shopping
🏴󠁧󠁢󠁥󠁮󠁧󠁿 43% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 28% Rest of England	🏴󠁧󠁢󠁥󠁮󠁧󠁿 25% London	🏴󠁧󠁢󠁳󠁣󠁴󠁿 32%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 24% London	🇮🇪 34%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 14%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 20%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 15% London	🇮🇪 29%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 31% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 40% London
🏴󠁧󠁢󠁳󠁣󠁴󠁿 38%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 25%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 20% Rest of England	🇮🇪 31%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 23%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 32%	🇮🇪 14%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 20% Rest of England	🏴󠁧󠁢󠁳󠁣󠁴󠁿 13%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 27%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 15%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 15% Rest of England
🇮🇪 34%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 25% London	🏴󠁧󠁢󠁳󠁣󠁴󠁿 18%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 31%	🇮🇪 20%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 30%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 13%	🇮🇪 19%	🇮🇪 12%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 26% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 15% Rest of England	🏴󠁧󠁢󠁷󠁬󠁳󠁿 14%
🏴󠁧󠁢󠁥󠁮󠁧󠁿 33% Rest of England	🇮🇪 25%	🇮🇪 18%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 31% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 20% Rest of England	🏴󠁧󠁢󠁥󠁮󠁧󠁿 29% Rest of England	🏴󠁧󠁢󠁥󠁮󠁧󠁿 11% Rest of England	🏴󠁧󠁢󠁥󠁮󠁧󠁿 18% London	🏴󠁧󠁢󠁷󠁬󠁳󠁿 11%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 26% Rest of England	🇮🇪 14%	🇮🇪 13%
🏴󠁧󠁢󠁷󠁬󠁳󠁿 31%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 23%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 16%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 28% Rest of England	🏴󠁧󠁢󠁷󠁬󠁳󠁿 18%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 10% London	🏴󠁧󠁢󠁥󠁮󠁧󠁿 7% London	🏴󠁧󠁢󠁷󠁬󠁳󠁿 18%	🏴󠁧󠁢󠁥󠁮󠁧󠁿 11% Rest of England	🏴󠁧󠁢󠁷󠁬󠁳󠁿 24%	🏴󠁧󠁢󠁷󠁬󠁳󠁿 13%	🏴󠁧󠁢󠁳󠁣󠁴󠁿 13%

D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,000

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Destination associations – trip experiences

Table 5. Destinations most strongly associated with each trip experience, All respondents

Nature and wildlife experiences	Walking, Hiking or Rambling	Adventure activities	Cycling or mountain biking	Water sports	Fishing - sea angling, coarse fishing, game fishing	Seasonal celebrations	Golf	Experience the nightlife	Watching or taking part in a sports event	Visit friends or family
41%	38%	24%	22%	16%	17%	24% London	14%	37% London	21% London	13% London
40%	37%	23%	22%	14%	17%	12%	12% Rest of England	15%	12% Rest of England	12% Rest of England
34%	31%	19%	21%	13% Rest of England	13%	11%	11%	15% Rest of England	11%	11%
30% Rest of England	30% Rest of England	17% Rest of England	19% Rest of England	13%	11% Rest of England	11%	9%	13%	9%	10%
9% London	9% London	9% London	7% London	8% London	7% London	11% Rest of England	7% London	11%	8%	8%

D3. And which, if any, of these places do you think are best suited to these holiday experiences? All data weighted.
Base: All respondents n=1,000

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Welsh Government

Back to contents

Appendix 3

Life stage summary

Table 6. Summary of key findings by life stage

	All	Pre-nesters	Families	Older Independents	Retirees
Size of adult population	69.4m	8.0m	22.8m	23.7m	14.8m
% of population very/ fairly likely to visit UK in next few years	53%	57%	73%	46%	32%
% of market very/fairly familiar with Wales	35%	31%	49%	26%	26%
% of market visited Wales in the past	31%	29%	48%	19%	23%
% of market 'very interested' in visiting Wales in next few years	33%	27%	45%	25%	26%
Top 3 preferred UK destination types (weaker Wales perceptions in red)	1.Cities and large towns 2.Historic/Heritage Towns 3.Wilderness and Nature	1.Cities and large towns 2.Historic/Heritage Towns 3.Wilderness and Nature	1.Cities and large towns 2.Historic/Heritage Towns 3.Wilderness and Nature	1.Cities and large towns 2.Historic/Heritage Towns 3.Wilderness and Nature	1.Historic/Heritage Towns 2.Cities and large towns 3.Scenic coastline/harbours
Top 3 UK influences (weaker Wales perceptions in red)	1.Value for money 2.Incredible scenery 3.Authentic culture	1.Value for money 2.Authentic culture 3.Welcoming people	1.Value for money 2.Incredible scenery 3.Authentic culture	1.Value for money 2.Incredible scenery 3.Authentic culture	1.Value for money 2.Incredible scenery 3.Authentic culture
Top 3 UK experiences (weaker Wales perceptions in red)	1.Heritage sites 2.Local food and drink 3.Outdoor attractions	1.Speciality shopping 2.Heritage sites 3.Local food and drink	1.Heritage sites 2.Local food and drink 3.Local history/culture	1.Heritage sites 2.Local food and drink 3.Family attractions	1.Heritage sites 2.Local history/culture 3.Local food and drink

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Segment summary

Table 7. Summary of key findings by segment

	Adventurers	Experience Seekers	Explorers	Sightseers	Cultural Buffs
Size of adult population	12.3m	12.6m	23.3m	11.2m	10.0m
% of population very/ fairly likely to visit UK in next few years	63%	69%	38%	49%	61%
% of market very/fairly familiar with Wales	34%	46%	28%	20%	40%
% of market visited Wales in the past	25%	45%	24%	21%	39%
% of market 'very interested' in visiting Wales in next few years	30%	48%	26%	24%	32%
Top 3 preferred UK destination types (weaker Wales perceptions in red)	1.Historic/heritage towns 2.Cities and large towns 3.Wilderness and nature	1.Cities and large towns 2.Historic/heritage towns 3.A touring holiday	1.Historic/heritage towns 2.Cities and large towns 3.Scenic coastline/harbours	1.Cities and large towns 2.Historic and heritage towns 3.Wilderness and nature	1.Cities and large towns 2.Historic/heritage towns 3.Scenic countryside/villages
Top 3 UK influences (weaker Wales perceptions in red)	1.Value for money 2.Incredible scenery 3.Rich in history	1.Value for money 2.Authentic culture 3.Incredible scenery	1.Value for money 2.Incredible scenery 3.Rich in history	1.Value for money 2.Authentic culture 3.Rich in history	1.Value for money 2.Authentic culture 3.Rich in history
Top 3 UK experiences (weaker Wales perceptions in red)	1.Heritage sites 2.Walking or hiking 3.Local food and drink	1.Heritage sites 2.Local food and drink 3.Adventure activities	1.Heritage sites 2.Local food and drink 3.Local history and culture	1.Heritage sites 2.Speciality shopping 3.Local food and drink	1.Heritage sites 2.Outdoor attractions 3.Local food and drink

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