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Llywodraeth Cymru
Welsh Government

Visit Wales consumer re-contact survey – Germany report (2024)

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Full Research Report: Visit Wales consumer re-contact survey – Germany report (2024)

Cardiff: Welsh Government, GSR report number 34/2024

Available at: <https://www.gov.wales/visit-wales-consumer-re-contact-survey-15-february-3-march-2024>

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

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BACKGROUND & METHODOLOGY



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Driving Tourism to Wales: Insights from German Enquirers

Visit Wales, the Welsh Government's tourism agency, is responsible for deploying tourism campaigns in the UK and internationally to position Wales as a leading tourist destination.

This detailed report analyses data from an online survey conducted in February 2024 amongst Visit Wales's German consumer contacts (referred to as 'enquirers' throughout). A separate report is available for UK and Ireland enquirers.

The primary research objectives of the survey were to:

- Assess trip conversion and relationship with Wales
- Understand the characteristics of trips taken in 2023
- Quantify the impact of the marketing
- Understand the plans for trips in 2024
- Assess the reasons for not taking a trip in 2023



Methodology

Enquirers were contacted by Visit Wales via email in February 2023 and asked to complete a 10–15-minute online survey available in German. Reminder invites were sent out to non-openers one week after first invitation was shared. A prize draw incentive was also offered.

Participants were given 18 days within which to complete the survey - the survey opening on 15th February and closing at 5pm on 3rd March.

Sample and Response Rate

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

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

Sample Sources	Sample Sizes
Website enquirers	5,517
Campaign enquirers	4,029
Total SAMPLE	9,546

From 9,546 invites sent to enquirers, 1,619 completed survey responses were received, **delivering an overall response rate of 17%**.



Definitions used within this report

This report uses several terms to define the survey respondents. These include:

- **Visit Wales enquirers:** The total survey population - Visit Wales consumer contacts used for this survey.
- **2023 Wales trip takers:** Visit Wales enquirers that stated within the survey that they took a short break or holiday in Wales in 2023
- **Non-visitors to Wales:** Visit Wales enquirers that stated within the survey that they did not take a short break or holiday in Wales in 2023
- **2024 Wales trip intenders:** Visit Wales enquirers that stated within the survey that they intend to take a short break or holiday in Wales in 2024

Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, the following is used:

- **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+



KEY FINDINGS



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Key Findings - Germany



Visitor Experience

Trips to Wales were highly rated for safety, hospitality, and natural beauty. However, visitors were less positive about infrastructure.

Activities and Interest

The natural landscape and cultural activities draw tourists, particularly in North Wales.

Extended Travel

Most German tourists extended their trips to other parts of the UK and Ireland.

Communications and Marketing

Visit Wales's communications were influential for 30% of traveller's decision making.

Repeat Visitation

Around half of visitors are planning a return trip in 2024, though families may be less likely to return.

Reasons for Non-Visit

Personal circumstances and Brexit were the main reasons cited for not visiting Wales.



PROFILE OF VISIT WALES ENQUIRERS





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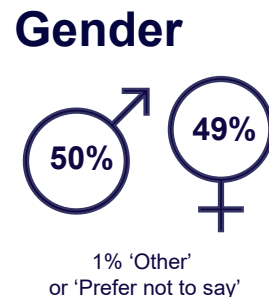
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The sample population was equally divided, with 50% identifying as male and 49% identifying as female. This composition is similar to the equivalent survey conducted in 2023.

 Life stage	2023	2024 (this report)
Pre-nesters	7%	5%
Families	13%	13%
Older independents	56%	59%
Retirement age	23%	23%

 Age	2023	2024 (this report)
16-34	9%	7%
35-54	36%	33%
55-64	33%	37%
65+	23%	23%



X1. How do you describe your gender?
 X2. Please type in your age.
 X2b. Do you have any children aged 15 or under in your household that you are responsible for (parent, legal guardian etc.)?
 Total base size, n=1619.

Compared to 2023, fewer respondents have never visited Wales before, and those who have been are more likely to consider returning.

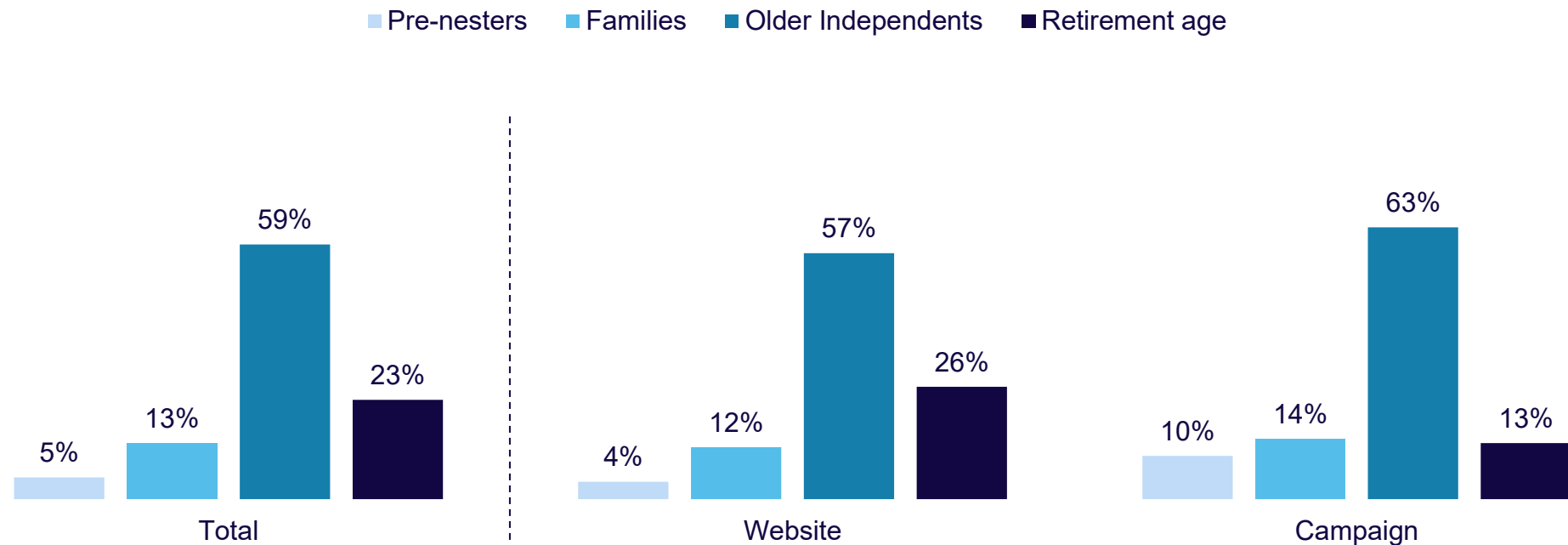
Relationship with Wales



A1. Which of the following statements best applies to you when it comes to visiting Wales? Total base size, n=1287 (2023), n=1619 (2024).

The vast majority of German enquirers are older independents, who are most likely to come through the campaigns. Retirees are more likely to enquire via the website.

Life stage by sample source

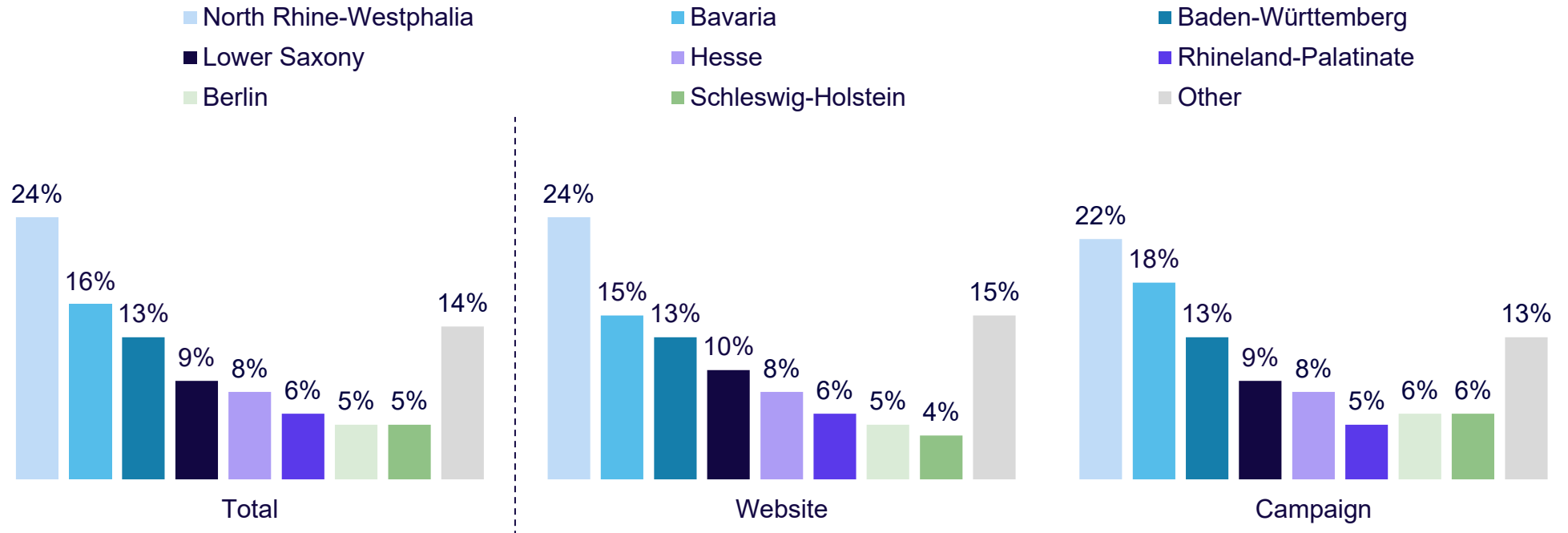


X2. Please type in your age.

X2b. Do you have any children aged 15 or under in your household that you are responsible for (parent, legal guardian etc.)? Total base size, n=1619 (Website n=1209, Campaign n=410).

North Rhine-Westphalia, Bavaria and Baden-Württemberg are the most common sample regions. This is consistent across sample source.

Region of residence



2023 TRIP CONVERSION AND RELATIONSHIP WITH WALES



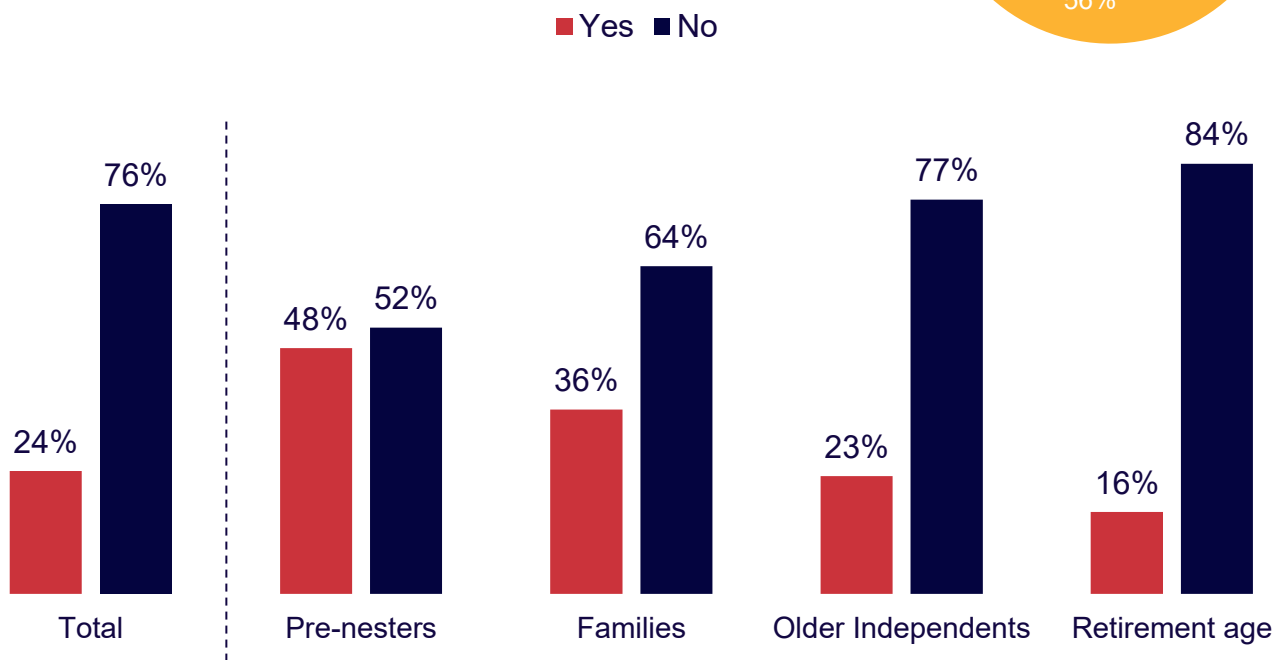
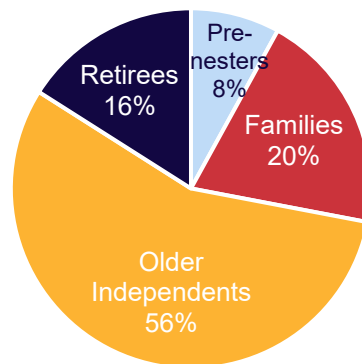
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Under a quarter stated that they took a holiday or short break in Wales in 2023. Pre-nesters were more likely to actually take a trip, retirees the least.

Whether took a short break or holiday in Wales in 2023



A2a. Did you take a short break or holiday in Wales in 2023?

Took a short break or holiday in Wales, n=828 (Pre-nesters n=31*, Families n=111, Older Independents n=486, Retirement age n=200). *low base size



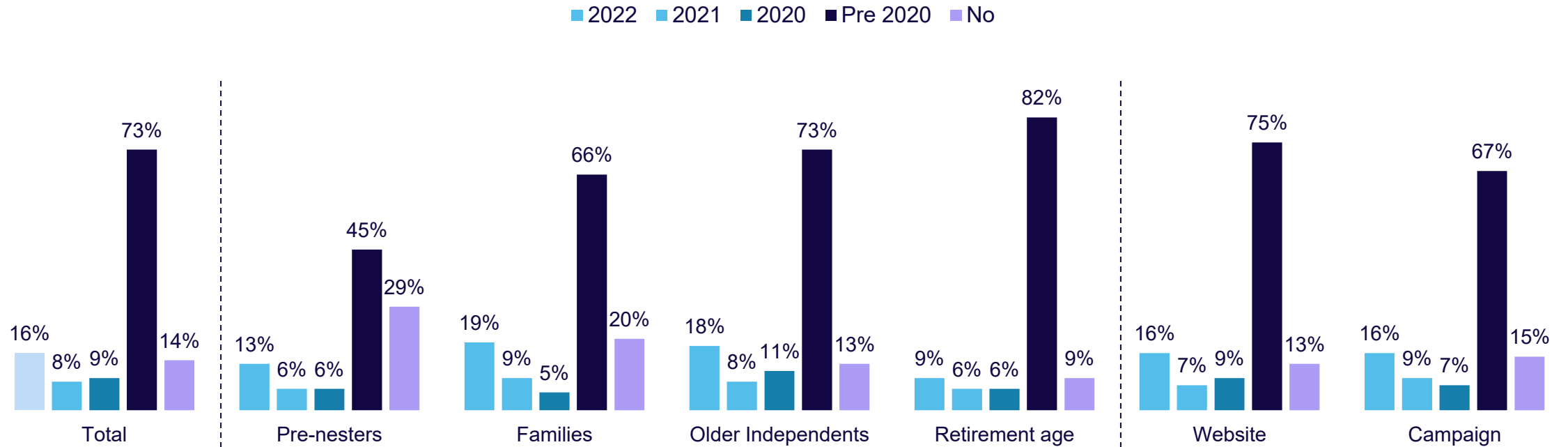
On average, German trip takers took 2.35 short breaks or holidays to Wales in 2023.

Number of short break or holidays taken in Wales in 2023



Retirees and respondents who use the website are more likely to have taken a trip pre-2023. Around three-quarters have taken a trip in Wales pre-2020.

When taken short breaks or holidays in Wales prior to 2023



A2b. Have you taken a short break or holiday in Wales prior to 2023?

Took a short break or holiday in Wales, n=828 (Pre-nesters n=31*, Families n=111, Older Independents n=486, Retirement age n=200). *low base size

2023 trip conversion and relationship with Wales

Demographic Trends

The study highlights that pre-nesters are more likely to have taken a trip in 2023, while retirees the least.

Past Travel Patterns

82% of retirees visited Wales before 2020.



2023 TRIP CHARACTERISTICS



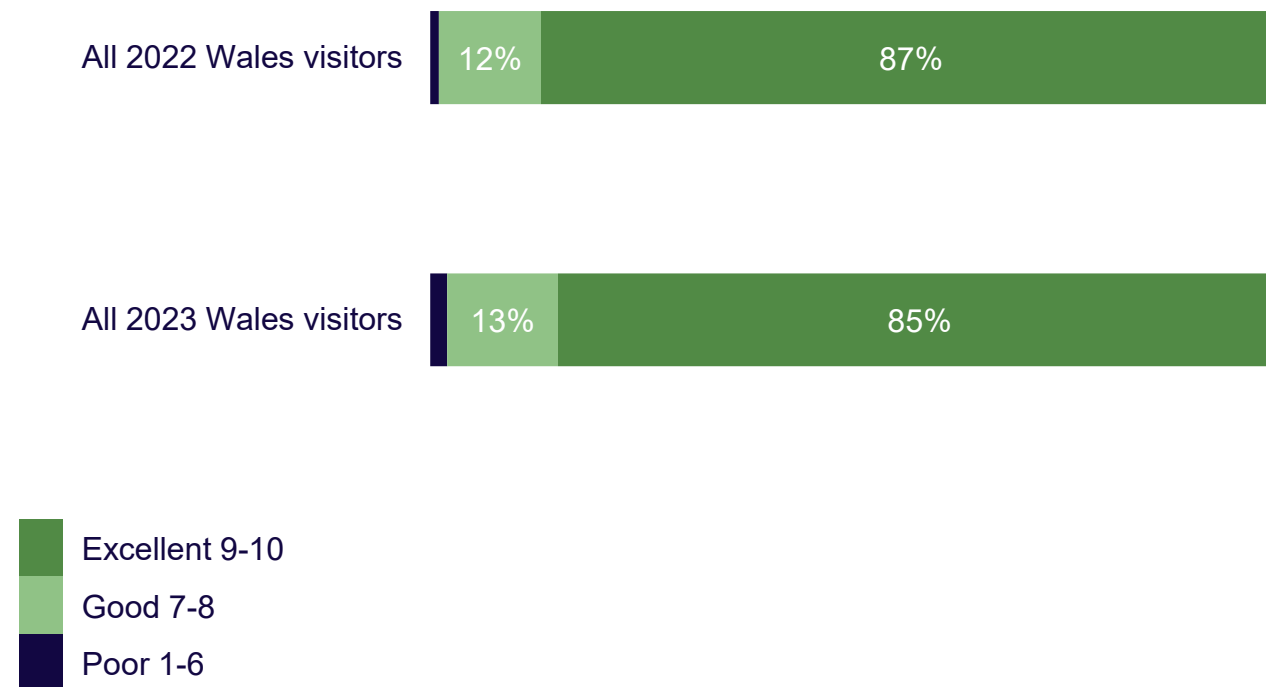
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Most overnight visitors in 2023 rated their experience in Wales as 'Excellent', remaining stable compared to last year.

Rating of experience staying in Wales



A15. Now going back to your trip to/within Wales in 2023, how would you rate your experience overall from 1 to 10 where 1 is very poor and 10 is very good? All Wales trip takers, n=123 (2022), n=199 (2023).



2023 Visit Wales trip takers were most satisfied with the feeling of safety, the welcome they received and the quality of the natural environment.

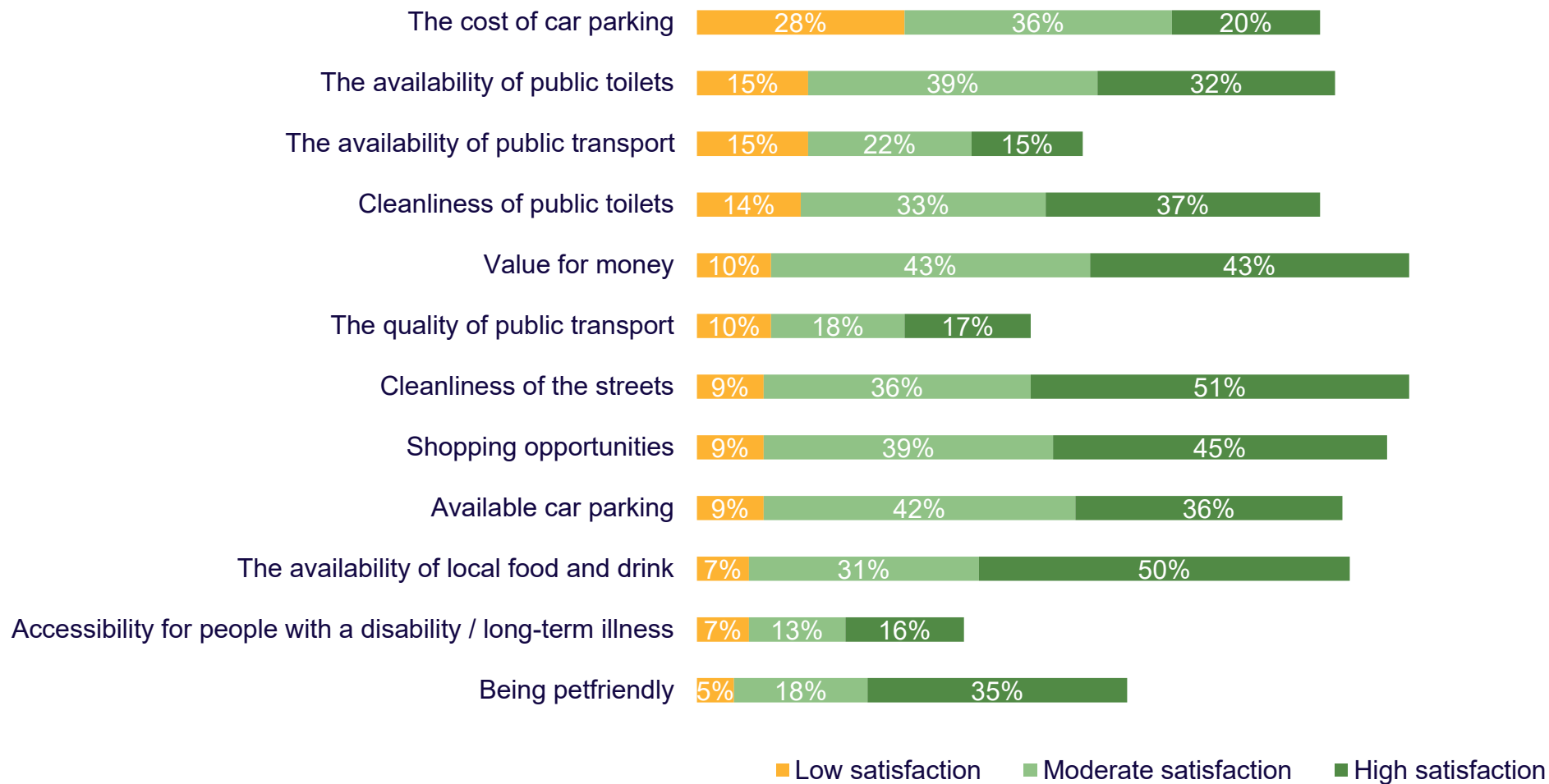
Satisfaction with different elements of the Wales visit experience, top 12



A16/17. How satisfied or dissatisfied were you with the following aspects of your trip in Wales in <MONTH>? Please tick 'not applicable' if an option doesn't apply to you. 1-10 with option for not applicable (1=Very dissatisfied, 10=Very satisfied). All 2023 Wales trip takers, n=199. Charted high to low based on satisfaction.

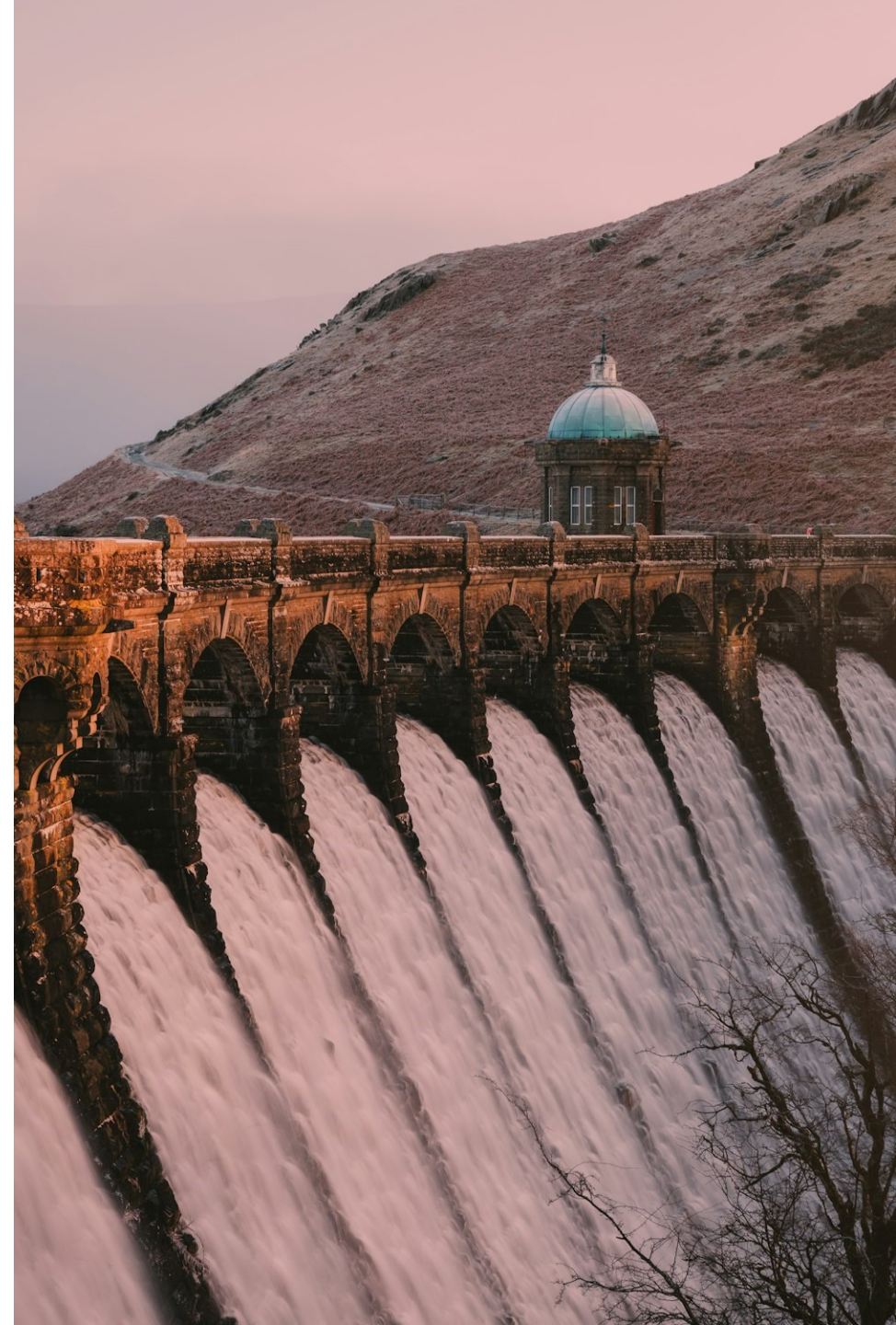
They were most dissatisfied with the cost of parking and availability of public toilets and transport.

Satisfaction with different elements of the Wales visit experience, bottom 12



64% chose to visit Wales 'To connect with nature' and 49% 'To experience the culture and heritage'.

Reasons for choosing Wales as a destination

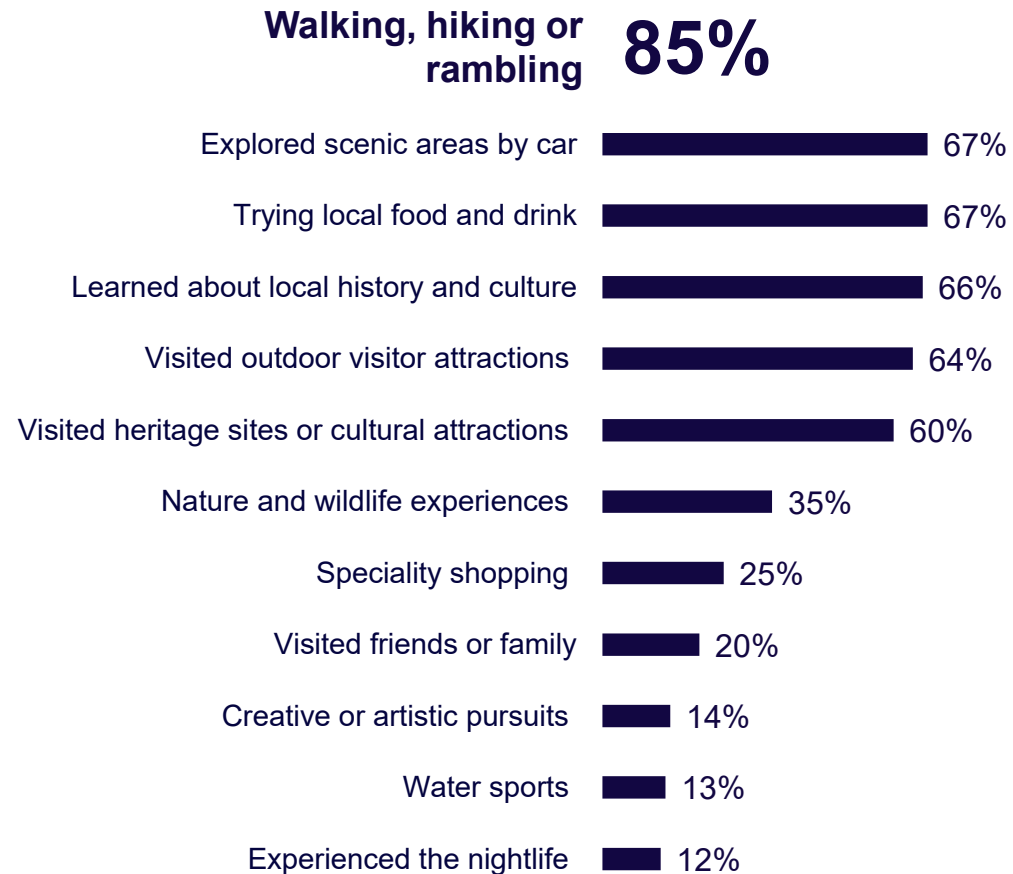


A7. Which, if any, of the following were the main factors that made you choose Wales as a destination for this short break/holiday in 2023?

All 2023 Wales trip takers, n=199. Charted high to low based on average.

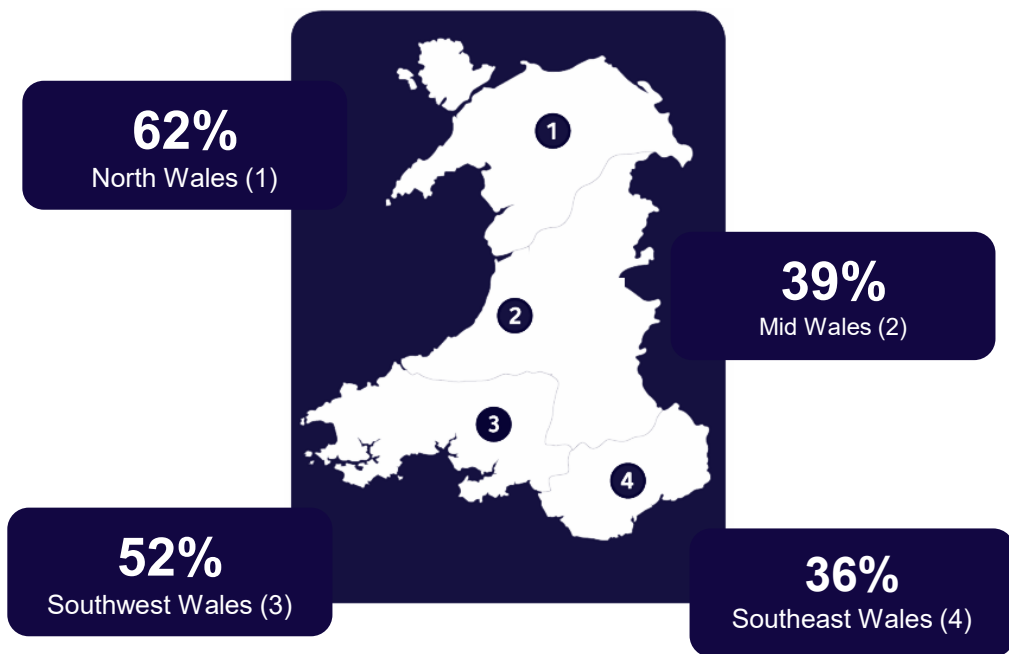
Aligning with the most popular reasons for visiting, 'Walking, hiking or rambling' were the most popular activities.

Activities done in Wales in 2023, top 12



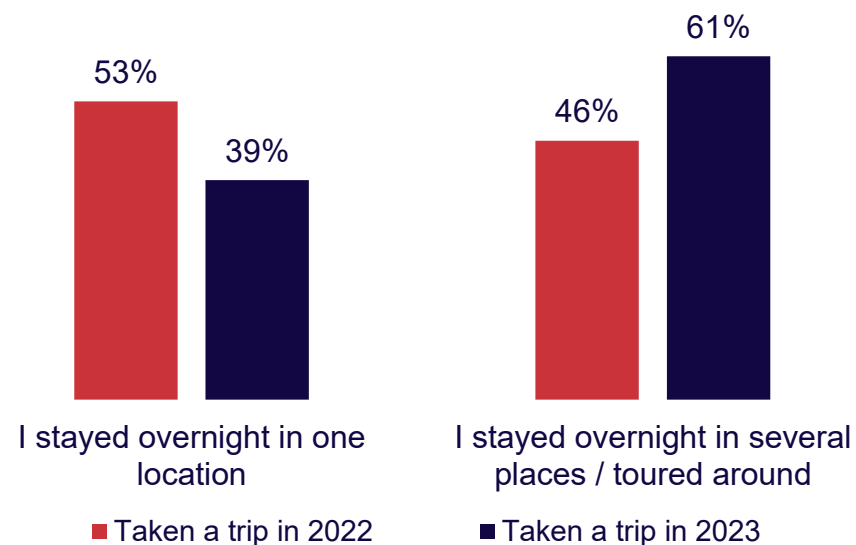
North Wales attracted the highest number of overnight visits from German enquirers, followed by the South-West. Most stayed in several places, in contrast to last year.

Where in Wales did you stay?



1% don't know / can't remember

Did you stay in one or several locations?

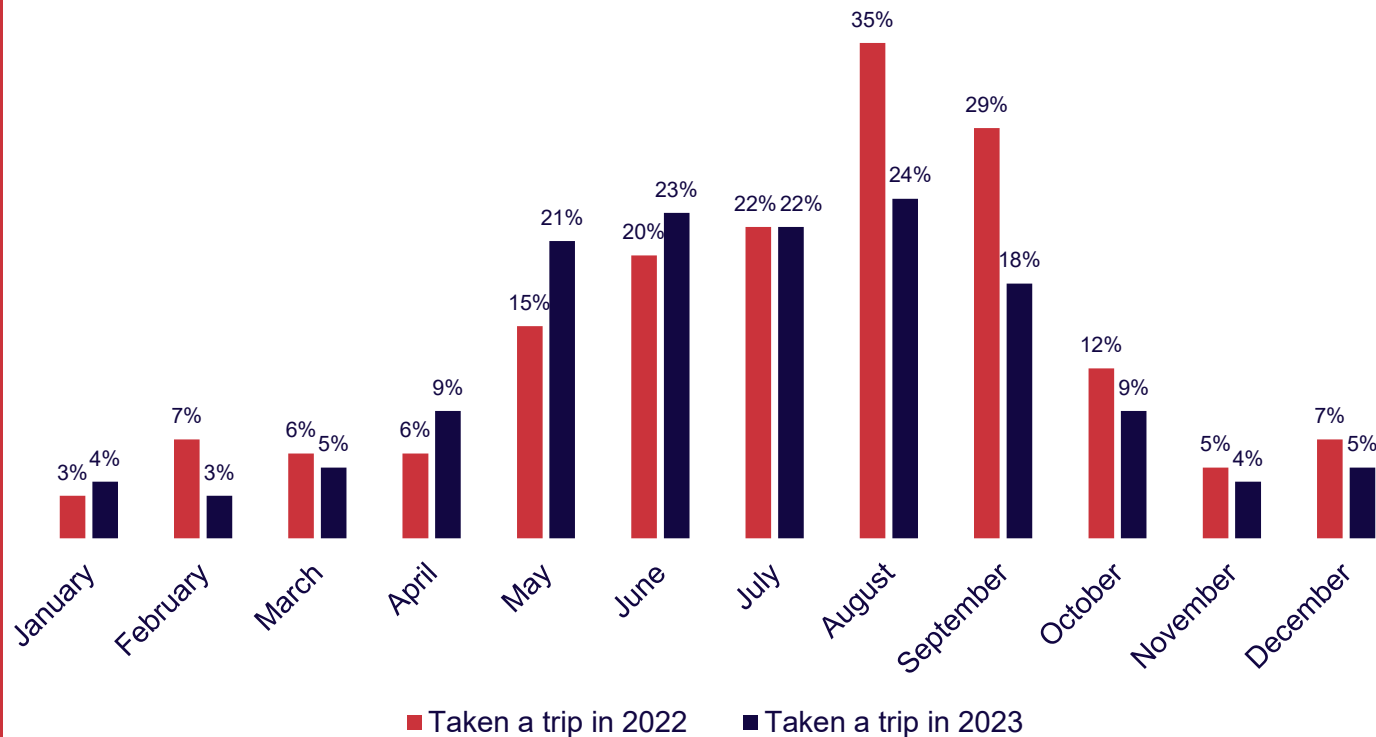


A12. Where in Wales did you stay overnight on this trip in [MONTH]? Please select all that apply.

A13. Which of the below best describes your trip in Wales in 2023? All Wales trip takers, n=123 (2022), n=199 (2023).

Summer months remain the most popular time to visit Wales. However, August and September were more popular in 2022.

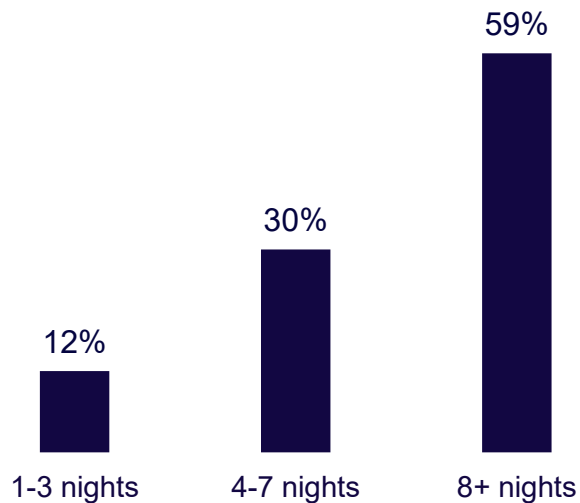
Month trip taken in Wales in 2022 or 2023



In Wales in 2023, visitors typically enjoyed longer stays, averaging nearly 10 nights. The average travel group consisted of just under 3 people.

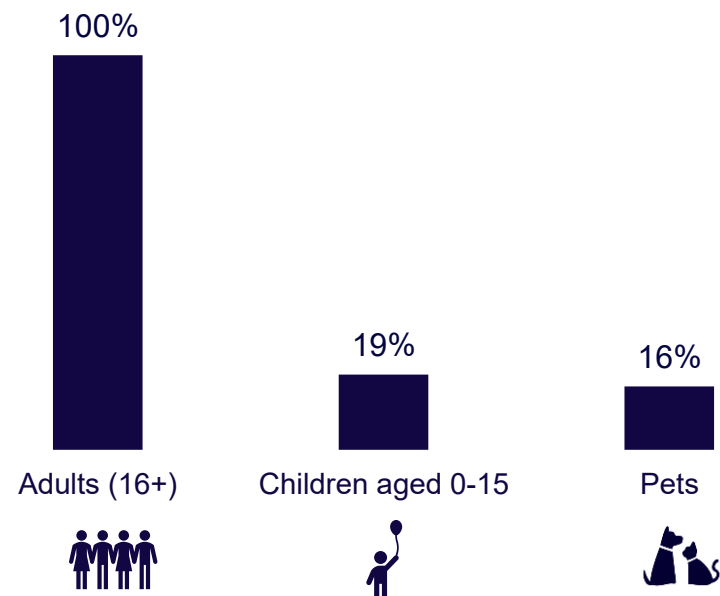
How many nights did you stay away for?

Average number of nights is 9.98 nights



How many were there in your immediate party?

Average 2.52

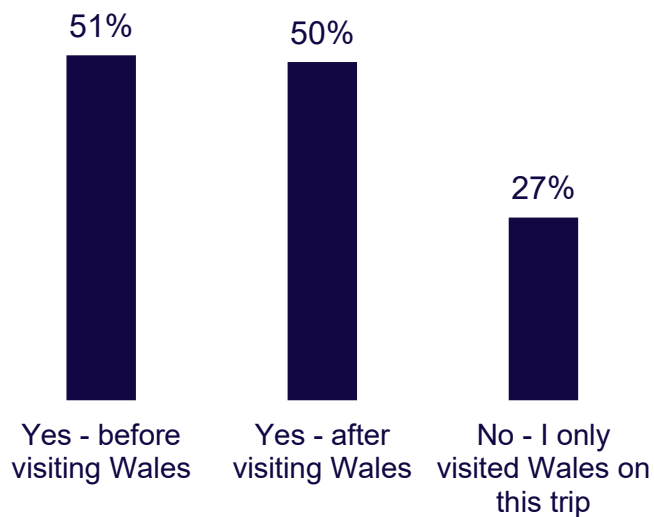


A5. On this overnight trip to/within Wales in 2023, how many nights did you stay away for?

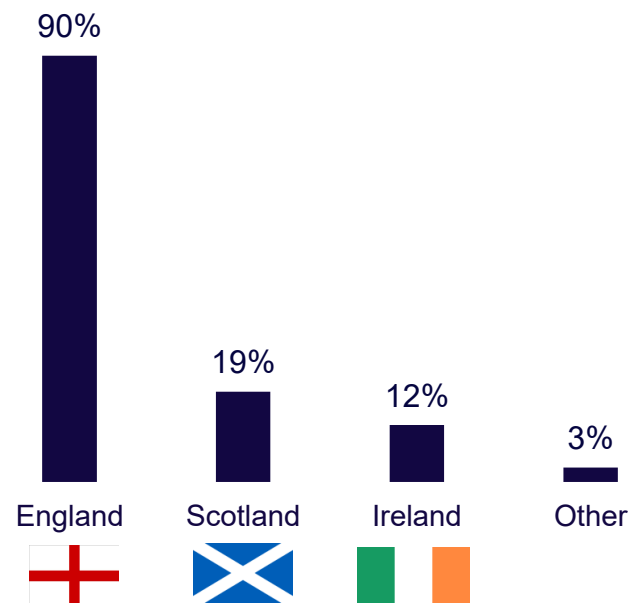
A6. Including yourself, how many of the following were there in your immediate party on this overnight trip to/within Wales in [MONTH]? All 2023 Wales trip takers, n=199.

73% of German visitors to Wales also explored other destinations within the UK and Ireland - England was the most popular choice.

Did you stay overnight in any other parts of the UK or Ireland as part this same trip?



Where else, in the UK and Ireland, did you stay?



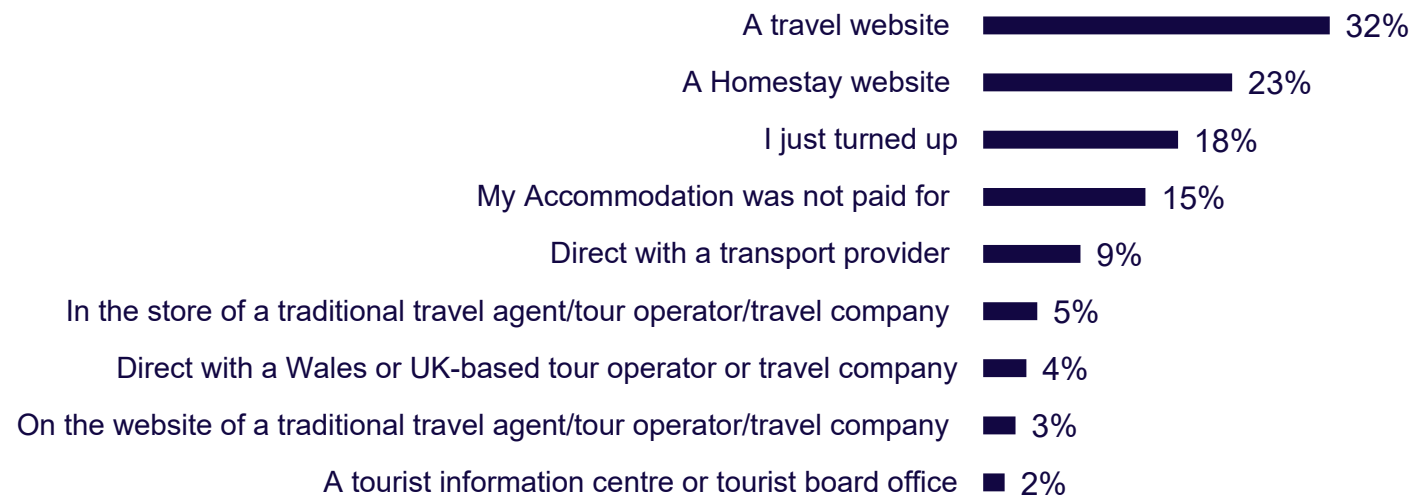
A8. Did you stay overnight in any other parts of the UK or Ireland as part of this same trip? All 2023 Wales trip takers, n=199.

A8b. Where else in the UK and Ireland did you stay overnight on this trip? All 2023 Wales trip takers that stayed elsewhere, n=145.

One third of Wales trip takers booked their accommodation 'directly with an accommodation provider', with 'a travel website' a close second choice.

How accommodation was book for Wales trip

Directly with an accommodation provider **33%**



19% found information or contact details for the accommodation they stayed in on the Visit Wales website

A9. How did you book your accommodation for this trip to/within Wales?

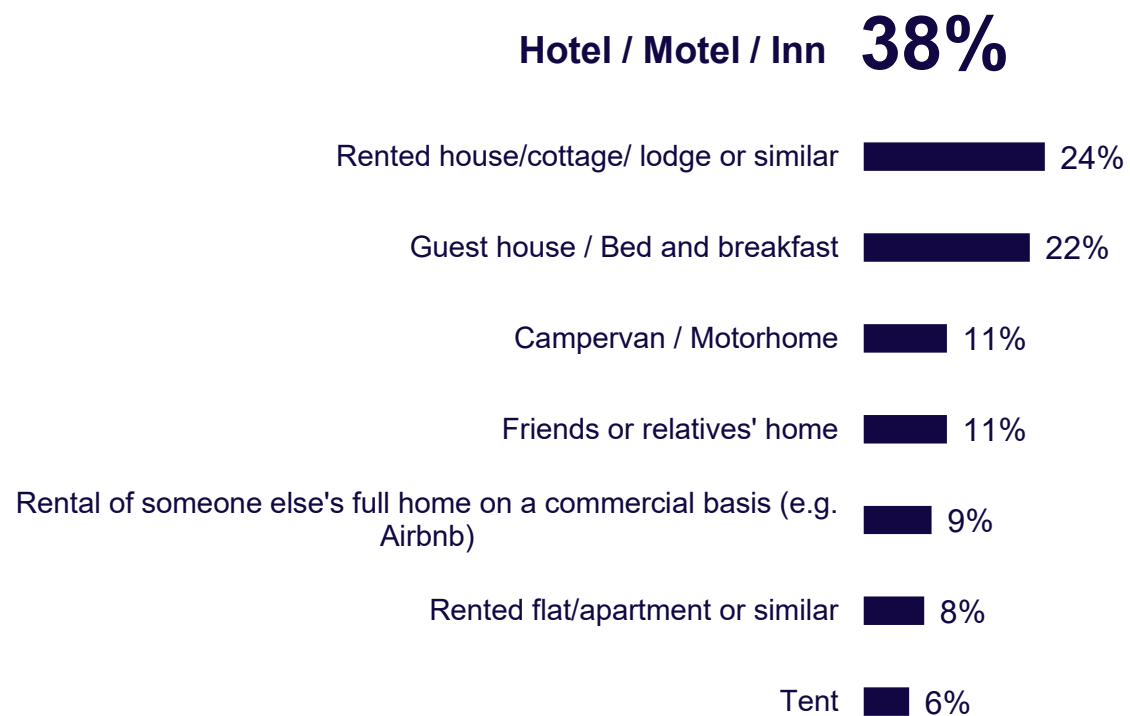
A10. Did you find information or contact details for the accommodation you stayed in on the Visit Wales website?

All who booked accommodation, n=169. Charted high to low.



Hotels were the preferred accommodation type, followed by rentals.

Type of accommodation stayed



A11. What type/s of accommodation did you stay at during your trip in 2023 to/within Wales? All 2023 Wales trip takers, n=199.

Charted high to low (top 8).

Understand the characteristics of trips taken in 2023

Positive Experience

Visitors generally rated their trip to Wales as 'Excellent' for safety, hospitality, and beauty but noted issues with infrastructure.

Activities

Many are attracted by Wales's nature and culture.

Extended Travel

Around three-quarters of German visitors also explored other UK and Ireland destinations.



IMPACT OF VISIT WALES MARKETING



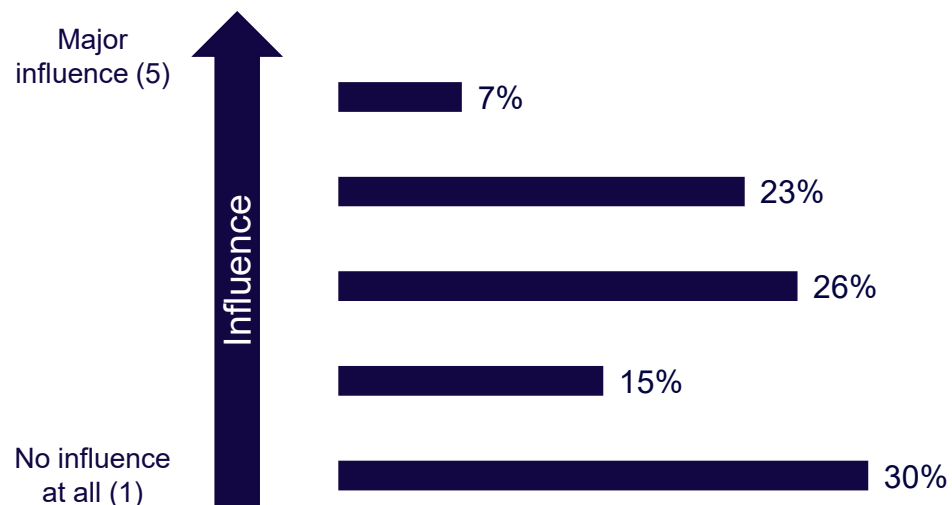
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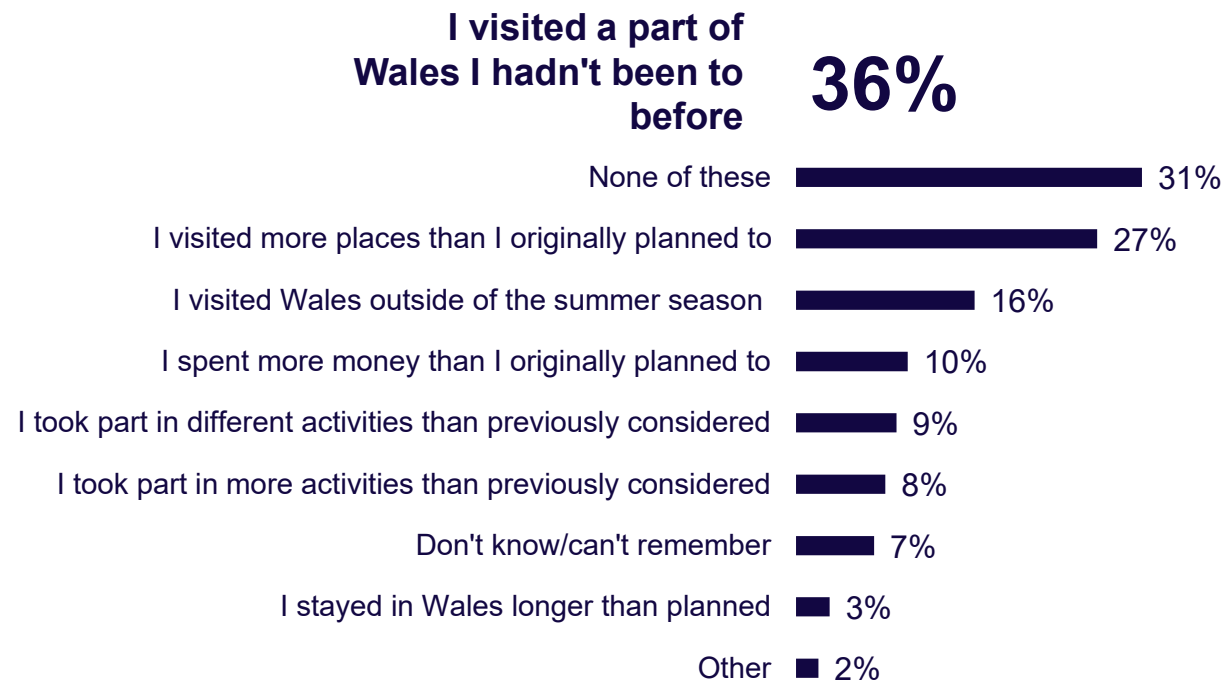


Around 30% stated that Visit Wales communications influenced their decision to take a short break or holiday in Wales. Over a third were influenced to visit a part of Wales they hadn't been to before.

Influence of Visit Wales communications on trip decision



Influence of Visit Wales on behaviour

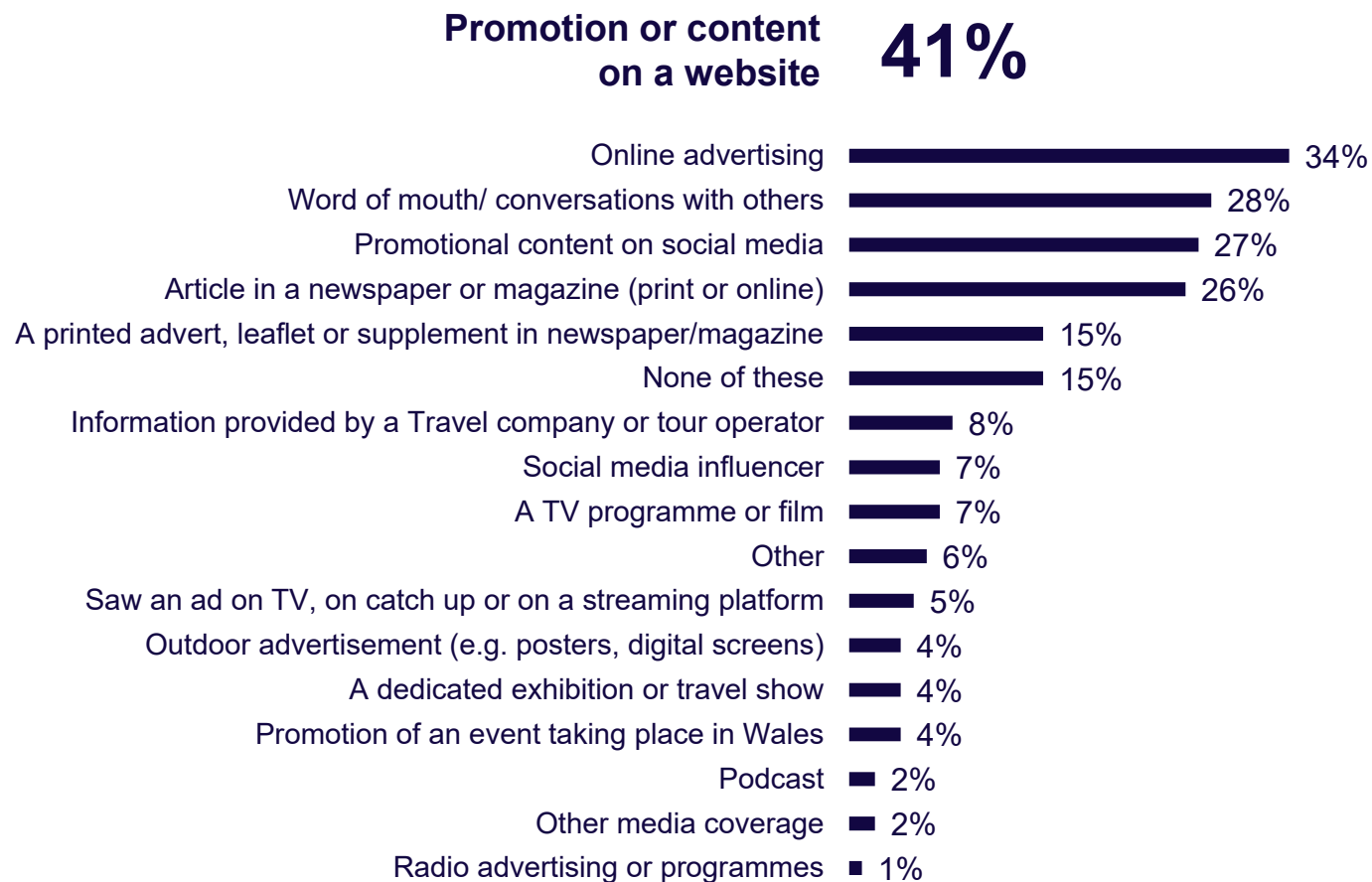


A22. On a scale of 1 to 5 where 1 means 'no influence at all' and 5 means 'a major influence', what influence, if any, did the Visit Wales communications have on your decision to take a short break or holiday in 2023?

A23. In 2023, did Visit Wales communications impact your behaviour in any of the following ways... All 2023 Wales trip takers, n=199.

Wales trip-takers were most likely to report having seen or heard about Wales through website and online ads.

Communication exposure



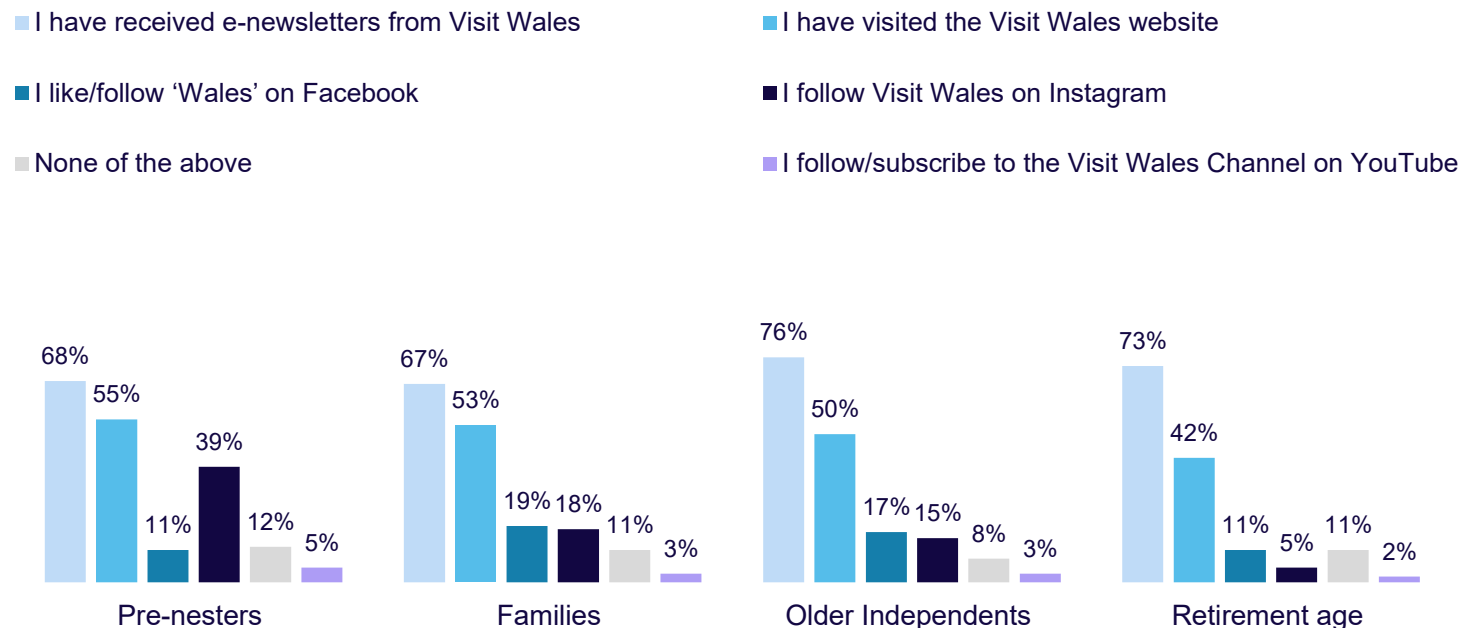
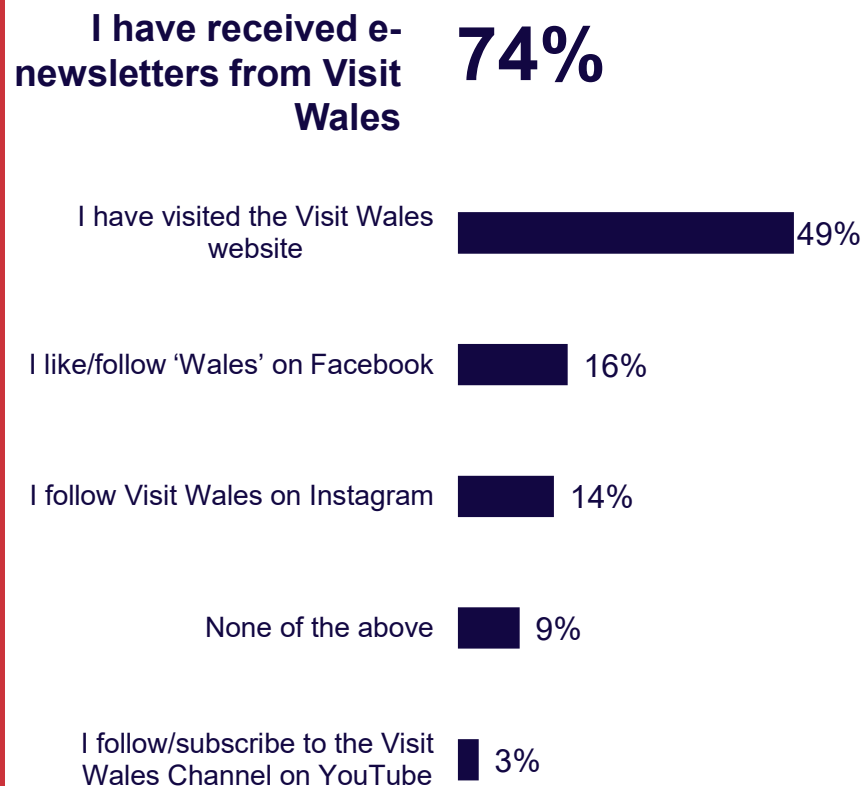
A18. Thinking about marketing and communications which, if any, of the following did you see or hear about Wales during 2023?

All 2023 Wales trip takers, n=199. Charted high to low.



E-newsletters are the most popular way for potential visitors to receive information from Visit Wales. Pre-nesters are more likely to follow Visit Wales on Instagram.

Contact with Visit Wales

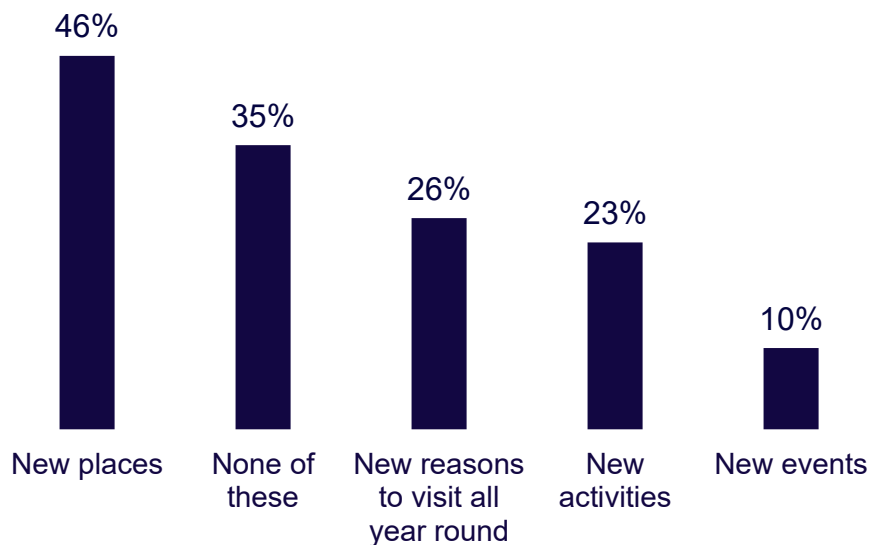


A19. Thinking about all contact you had with Visit Wales in 2023, which of the following apply to you? All enquirers, n=1619 (Pre-nesters n=85*, Families n=206, Older Independents n=955, Retirement age n=373).

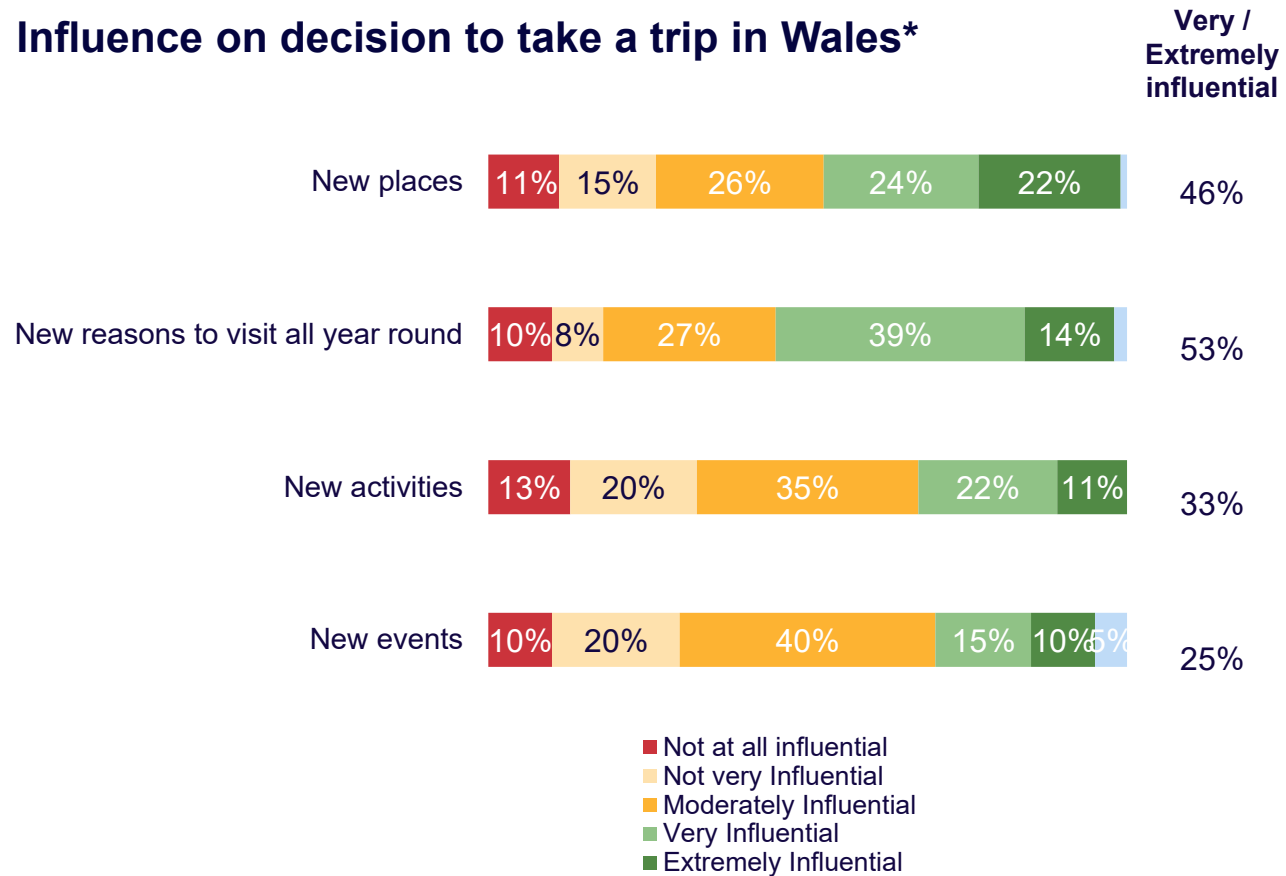
*low base size. Charted high to low.

Almost half saw communication promoting Wales in relation to ‘new places’. Of those who saw the communication, almost half said it was influential.

See communications promoting Wales?



Influence on decision to take a trip in Wales*



A23a. In 2023, did you see any communication promoting Wales in relation to the following? All 2023 Wales trip takers, n=199 Charted high to low.
 A23b. And how influential were they on your decision to take a trip to/within Wales in 2023. All 2023 Wales trip takers, new places n=91, new reasons to visit all year round n=51, new activities n=46 & new events n=20. *low base size

Over half of Visit Wales trip-takers had already decided to take a short break or holiday in Wales in 2023 by the end of 2022.

Mindset around visiting Wales at the end of 2022

I had already decided to visit Wales in 2023 **54%**

I was considering visiting Wales in 2023, but had not made a final decision **33%**

I was not considering visiting Wales in 2023 **11%**



Don't know/ can't remember **2%**



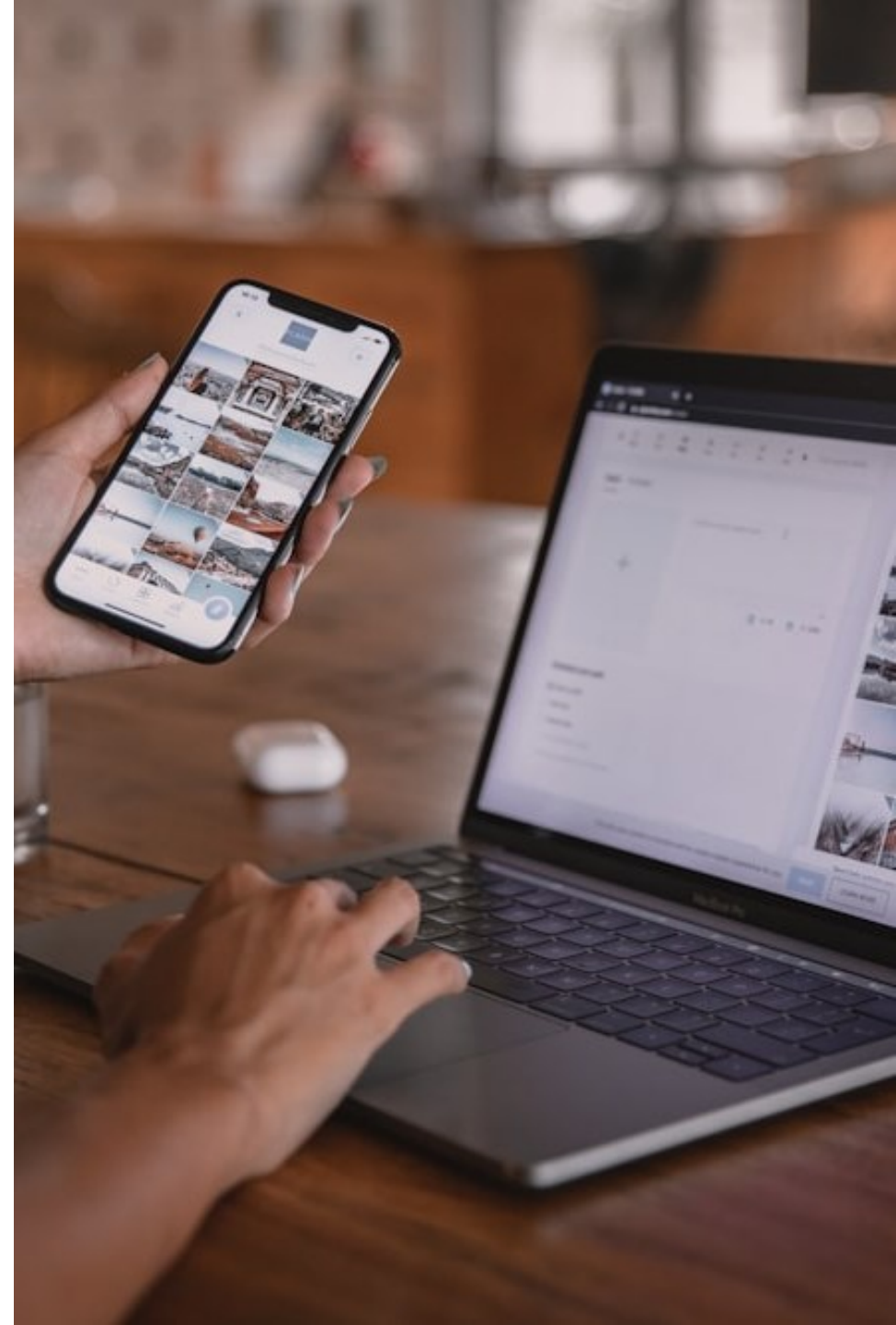
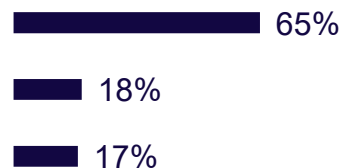
A24. Finally in this section, thinking back to the end of 2022, which of these statements best describes your plans at that time to visit Wales in 2023? All 2023 Wales trip takers, n=199. Charted high to low.

The Visit Wales website is accessed more often through a computer at home or at work, while a mobile is more often used during a trip. Additionally, most access the Visit Wales website at home.

On which device?

	 Laptop	 Mobile
At home	76%	59%
During a trip	31%	84%
At work	63%	51%

Where did you access the Visit Wales website?



A20. In the past 12 months, what devices did you use to access the Visit Wales website? All who visited Visit Wales website, n=773 at home, n=202 at work, n=207 during a trip in Wales/elsewhere.

Impact of Visit Wales marketing

Influence of Communications

Around 3 in 10 trip-takers were influenced by Visit Wales's communications, with many also encouraged to explore new Welsh regions.

Decision Timing

Over half had planned their 2023 Wales trip by the end of 2022.



LIKELIHOOD OF VISITING WALES IN 2024



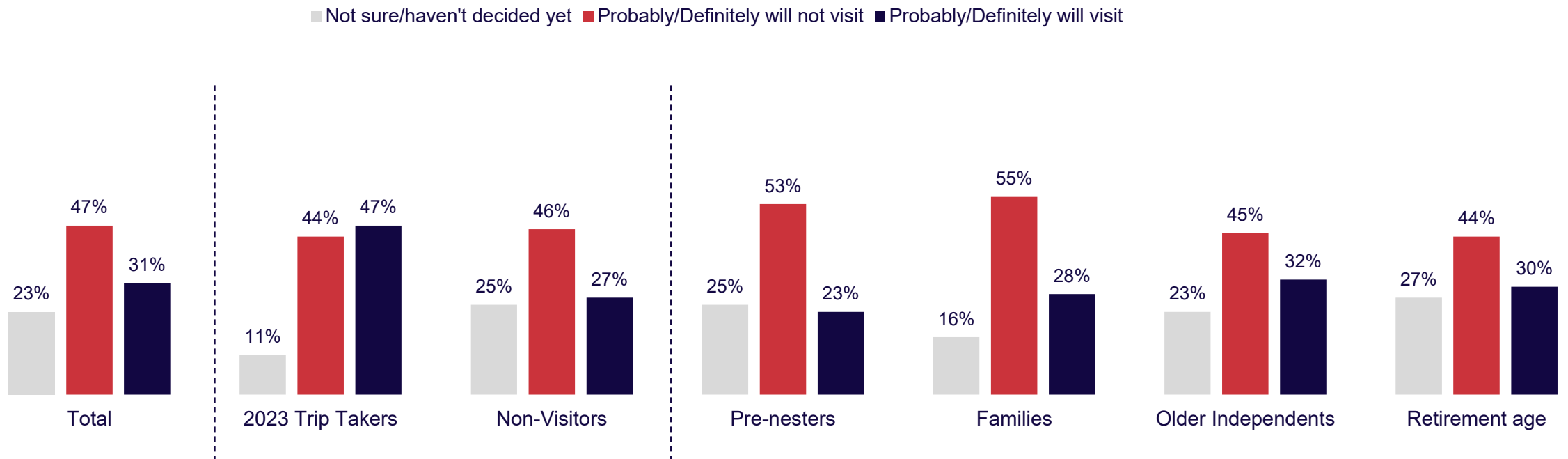
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Almost half of 2023 trip-takers are planning to visit Wales again in 2024. Trip-takers in 2023 are also more likely to visit in 2024, compared to those who did not visit in 2023. Families are the most likely to be outright rejectors.

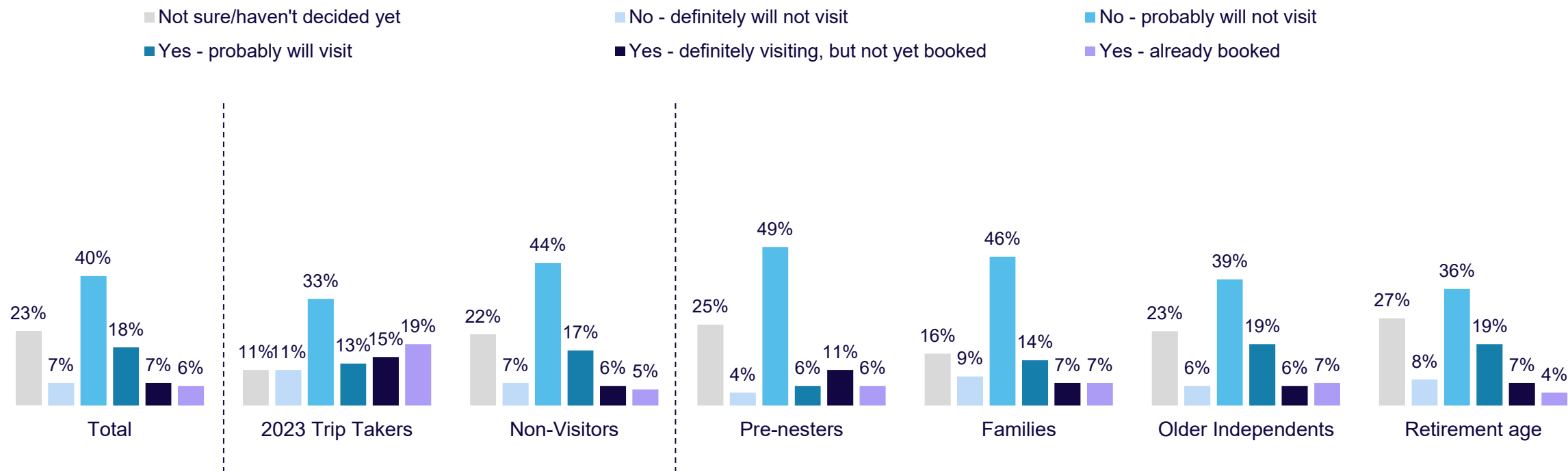
Likelihood of visiting Wales in 2024



B5. Are you intending to visit Wales for a short-break or holiday in 2024? Total base size, n=1619 (2023 Trip takers n=199, Non-visitors n=1420, Pre-nesters n=85*, Families n=206, Older Independents n=955, Retirement age n=373). *low base size

6% of all Visit Wales enquirers have already booked their trip for 2024. Almost half of 2023 trip takers are planning to visit Wales in 2024 again. Pre-nesters and families are less likely to visit.

Likelihood of visiting Wales in 2024

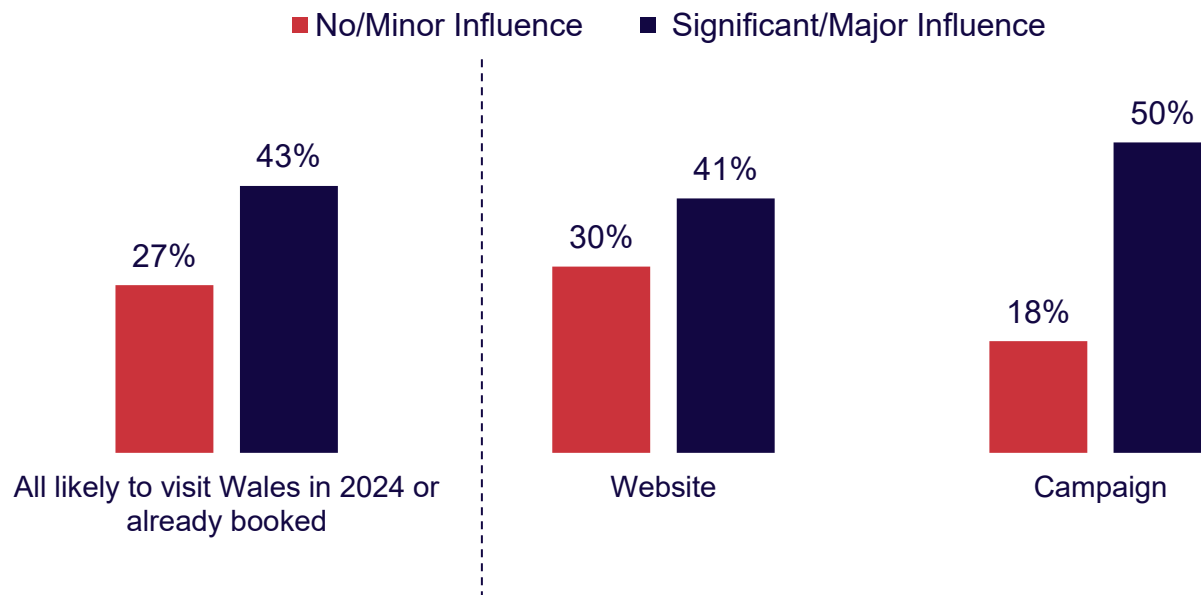


B5. Are you intending to visit Wales for a short-break or holiday in 2024? Total base size, n=1619 (2023 Trip takers n=199, Non-visitors n=1420, Pre-nesters n=85*, Families n=206, Older Independents n=955, Retirement age n=373).

*low base size

43% of Wales 2024 trip intenders indicate that Visit Wales communications have influenced their decision to take a trip to Wales in 2024 – although those that come from the website are less likely to be influenced.

Influence of Visit Wales communication on trip decision, by sample source

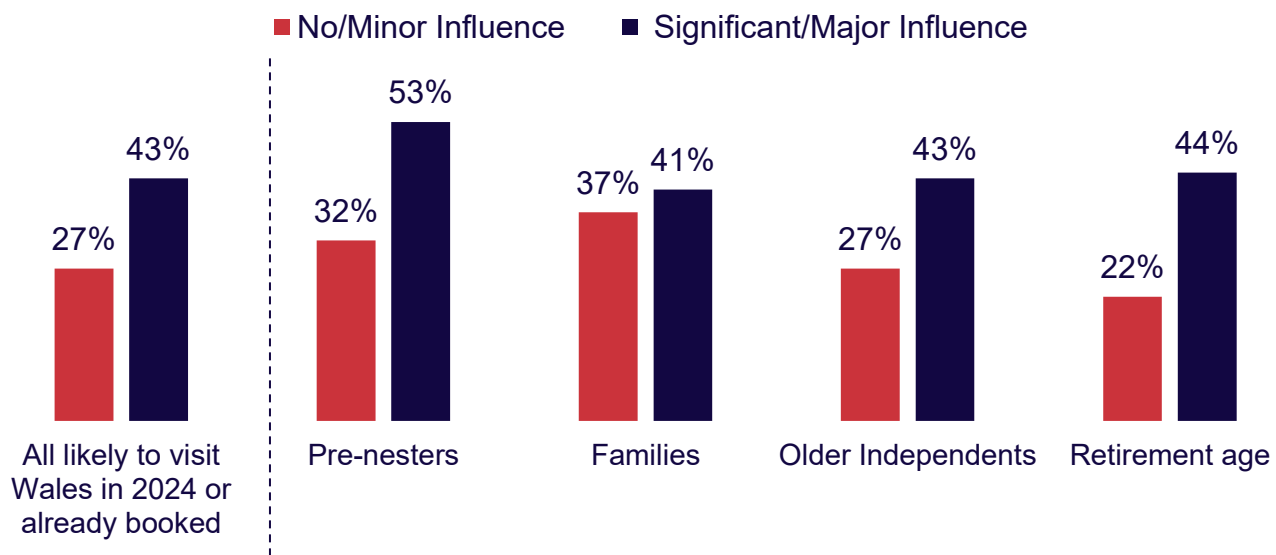


B10. On a scale of 1 to 5 where 1 means 'no influence at all' and 5 means 'a major influence', what influence, if any, has Visit Wales communications had on your decision to take a holiday or short break <vacation> in Wales in 2024? All likely to visit Wales in 2024 or already booked, n=492 (Website n=372, Campaign n=120).

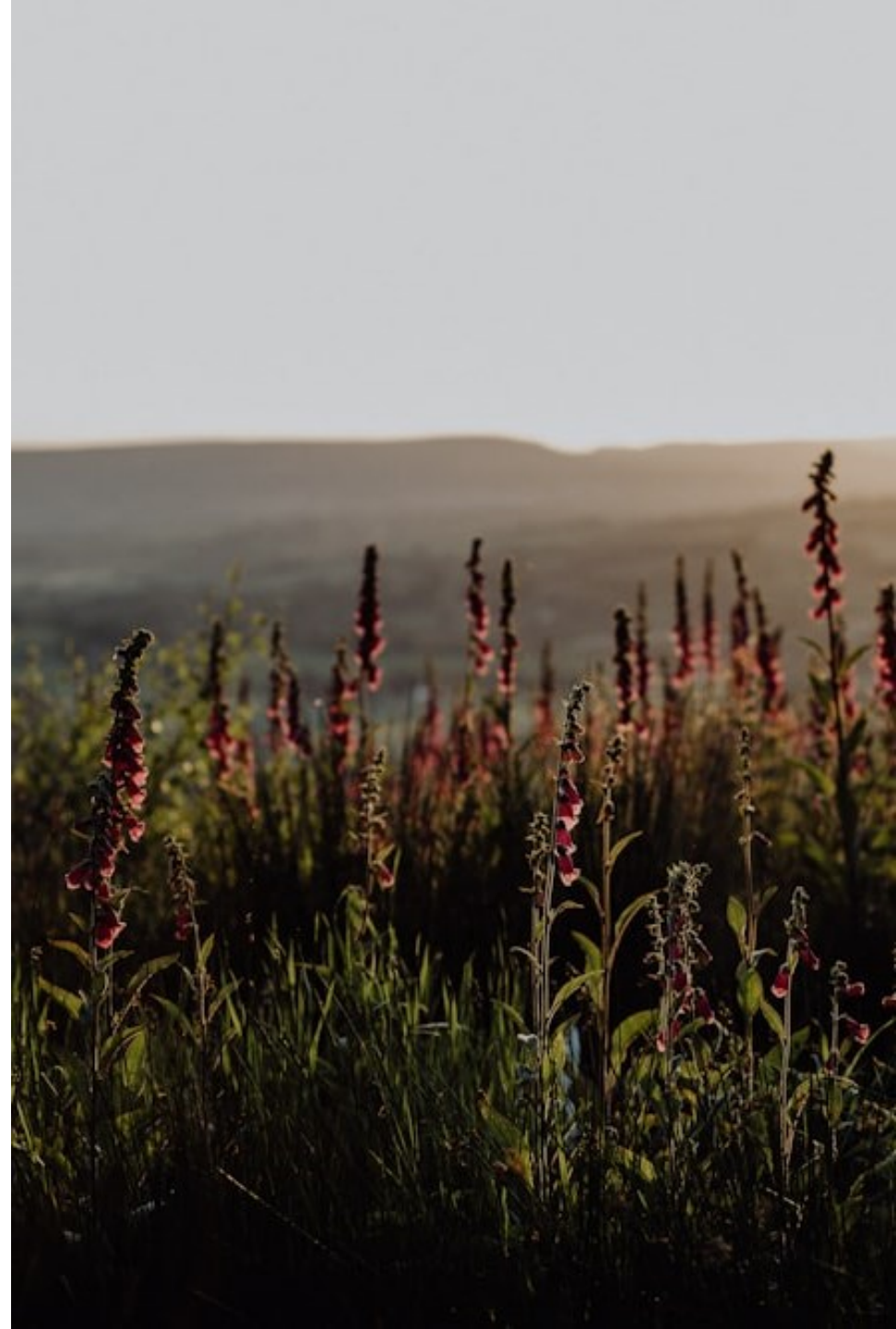


Families are less likely to be influenced on their decision to take a holiday or short break in Wales in 2024 compared to retirees.

Influence of Visit Wales communication on trip decision, by lifestage

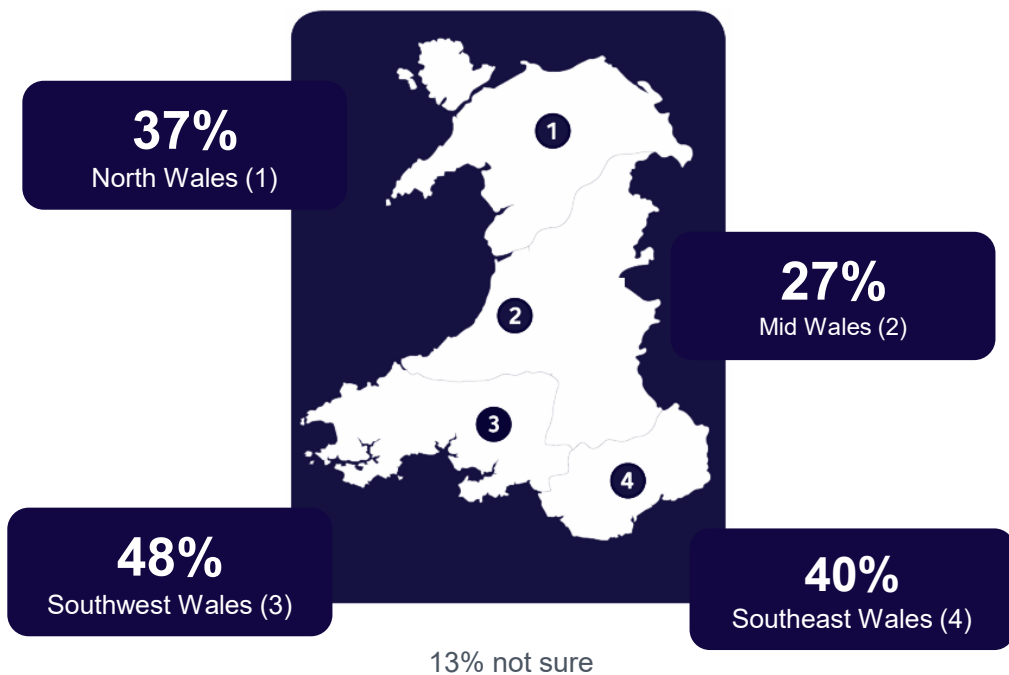


B10. On a scale of 1 to 5 where 1 means 'no influence at all' and 5 means 'a major influence', what influence, if any, has Visit Wales communications had on your decision to take a holiday or short break <vacation> in Wales in 2024? All likely to visit Wales in 2024 or already booked, n=492 (Pre-nesters n=19*, Families n=59*, Older Independents n=303, Retirement age n=111). *low base size

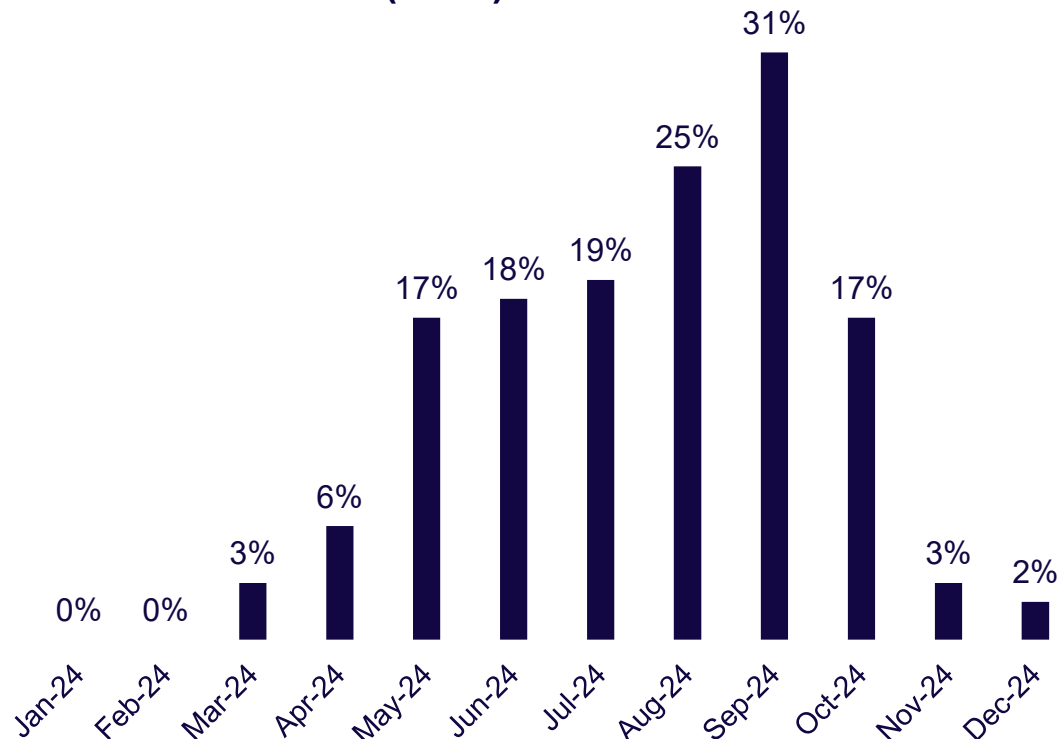


The most popular destination in Wales for 2024 is South-West Wales. Those who stated that they are likely to visit (or already booked) are most likely to visit between May and October.

Where in Wales do you plan on visiting in 2024?



Planned month of visit (2024)

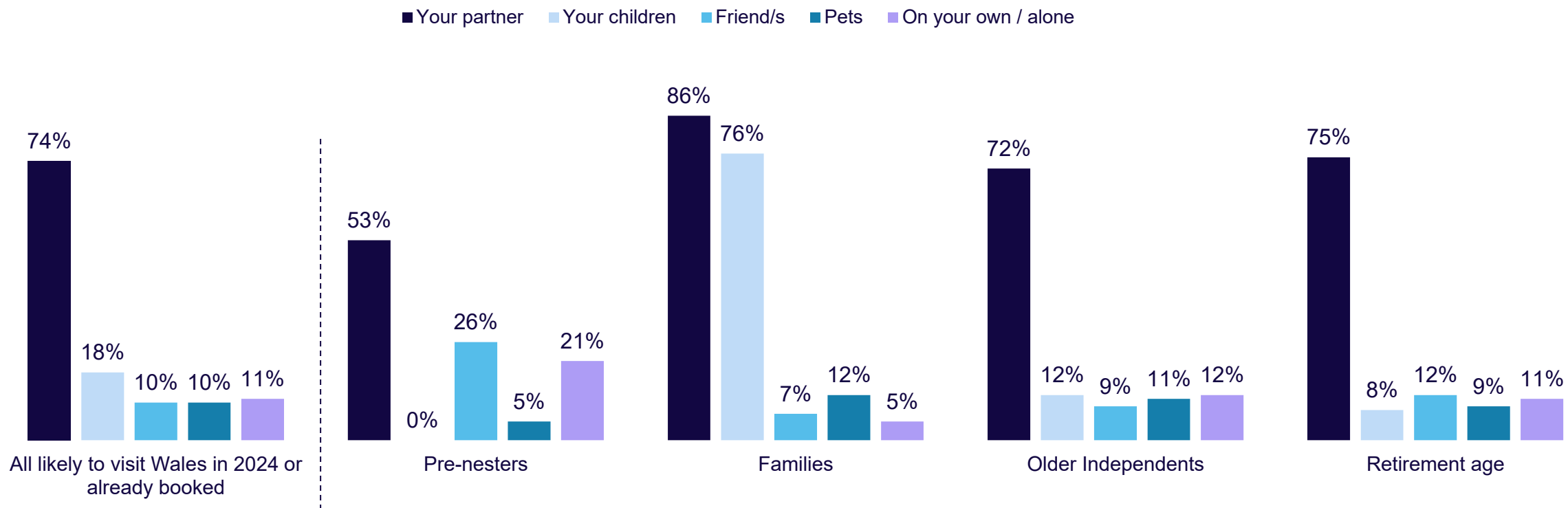


B8_DE. Which of these areas do you plan on visiting on your next holiday or short break in Wales in 2024?

B7. When are you planning to take a short break or holiday in Wales in 2024? All likely to visit Wales in 2024 or already booked, n=492.

Almost three-quarters of 2024 trip intenders plan to visit Wales in 2024 with their partner.

Party make-up for Wales trip in 2024, by lifestage



B9. Who, if anyone, is likely to accompany you on your next short break or holiday in Wales? All likely to visit Wales in 2024 or already booked, n=492 (Pre-nesters n=19*, Families n=59*, Older independents n=303 and Retirement age n=111). *low base size

Of those unlikely to visit Wales in 2024, more than half stated they 'don't know' when they would visit Wales. 28% stated they would visit in 2025.

Next likely to visit Wales?

Don't know **51%**

In 2025 28%

In 2026 13%

In 2027 or later 8%



Understand the plans for trips in 2024

Repeat Visitation

About half of 2023's visitors plan to return to Wales in 2024. However, families are less likely to revisit.

Marketing Impact

43% of potential visitors are swayed by Visit Wales's messaging.

Travel Companions

Most 2024 trip planners intend to visit with a partner.



REASONS FOR NOT TAKING A TRIP



Llywodraeth Cymru
Welsh Government

**KUBI
KALLOD**



Nearly half of non-trip takers were considering a trip to Wales in 2023. Just under a quarter of these enquirers didn't take a holiday at all, while just over three-quarters went elsewhere.

43% of non-Wales trip takers were considering an overnight trip in Wales in 2023

**Went somewhere else /
somewhere else abroad 55%**

Went somewhere else in British Isles or Ireland 24%

Did not take a holiday at all 23%

B1. You mentioned that you did not take a short break or holiday in Wales during 2023. Were you considering an overnight trip to/within Wales in 2023 at any stage?

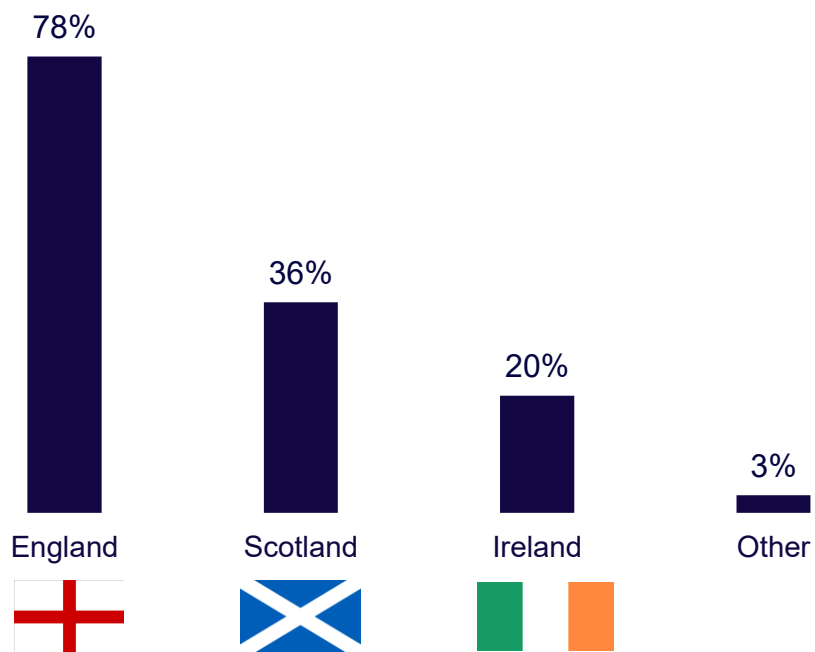
B2. And did you go somewhere else for a holiday, or did you not take a holiday at all?

Non-Wales trip takers 2023, n=629.



Of the non-visitors to Wales that went elsewhere in Britain and Ireland, England was the most visited alternative destination.

Destination of those that went elsewhere in the British Isles and Ireland



B3. And in which of the following areas of the British Isles and Ireland did you go? Non-visitors to Wales that went elsewhere in the British Isles, n=144.



In 2023, the main reasons for not visiting Wales were personal circumstances and Brexit-related travel challenges. 'Other' reasons were preferring different destinations or lacking time.

Reasons for not visiting Wales in 2023

**Personal
circumstances 38%**



B4. What are the reasons that you didn't visit Wales for a holiday in 2023? Non-Wales trip takers 2023, n=629. Charted high to low.





Reasons for not taking a trip

Potential Interest

Nearly half of those who didn't visit Wales in 2023 were considering it.

Reasons for Non-Visit

The main reasons for not visiting Wales were personal circumstances and perceived Brexit-related travel barriers.

