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Welsh Government

Visit Wales consumer re-contact survey – UK and Ireland 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 – UK and Ireland 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 UK & Ireland 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 UK and Ireland consumer contacts (referred to as 'enquirers' throughout). A separate report is also available for German 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 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 to 15 minute online survey, available in English or Welsh. Reminder invites were sent out to non-openers one week after the 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	5,328
ECRM enquirers	37,565
Campaign enquirers	2,861
Social media enquirers	4,805
Total SAMPLE	50,559

From 50,559 invites sent to enquirers, 6,208 completed survey responses were received, delivering an overall response rate of 12%.



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 – UK & Ireland

Visitation Rates

Wales maintained its domestic visitor numbers in 2023, aligning with the previous year's scores. Nearly two-thirds of respondents reported visiting.

Historical Travel Patterns

A substantial proportion of visitors, particularly those who are retired, have been consistent visitors to Wales since before 2020, suggesting a strong affinity for Wales.

Visitor Satisfaction

Satisfaction with the Welsh tourism experience remained stable, with most visitors rating their trip as 'Excellent'.

Satisfaction Drivers

The quality of the natural environment, personal safety, and diversity of attractions were principal factors driving visitor satisfaction. Conversely, concerns over infrastructure were noted dissatisfaction points.

Visitor Preferences

North Wales and Eryri (Snowdonia) emerged as favorite destinations, with a slight preference shift towards visiting in spring, although August remains the peak visitation month.

Communication Influence

Around a third of trip-takers acknowledged that Visit Wales communications had swayed their decision to visit, particularly by encouraging visits to Wales outside of the summer season.

Decision Timing

A considerable number of visitors had decided on their trip by the end of the previous year, emphasising the importance of early marketing efforts in influencing travel decisions.

High Return Intent

Reflecting positive visitor experience, a majority of 2023 visitors intend to return in 2024, especially retirees.



PROFILE OF VISIT WALES ENQUIRERS





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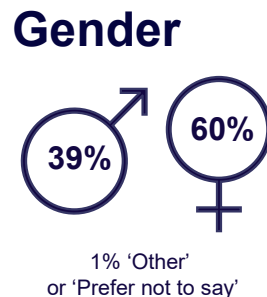
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The sample population is slightly older compared to 2023. In terms of gender, there were more female-identifying participants.

 Life stage	2023	2024 (this report)
Pre-nesters	9%	4%
Families	10%	11%
Older independents	44%	43%
Retirement age	37%	42%

 Age	2023	2024 (this report)
16-34	11%	5%
35-54	23%	24%
55-64	29%	29%
65+	37%	42%



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=6208.

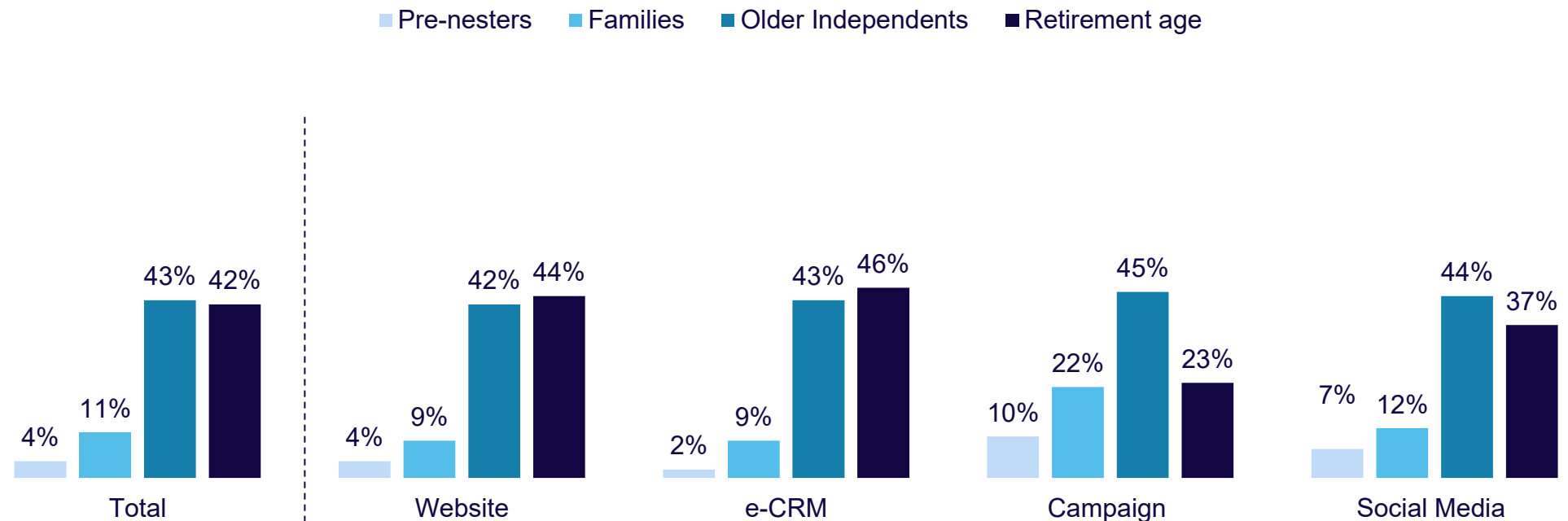
Compared to 2023, enquirers from the UK and Ireland in 2024 remain largely unchanged in their behaviours and intentions for visiting Wales, with almost half often taking short breaks and intending to visit again within the next year.

Relationship with Wales



The vast majority of UK and Irish enquirers are either Older Independents or Retirement Age. They're considerably more likely to come through the ECRM than their younger counterparts – who are more likely to come via campaigns.

Life stage by sample source

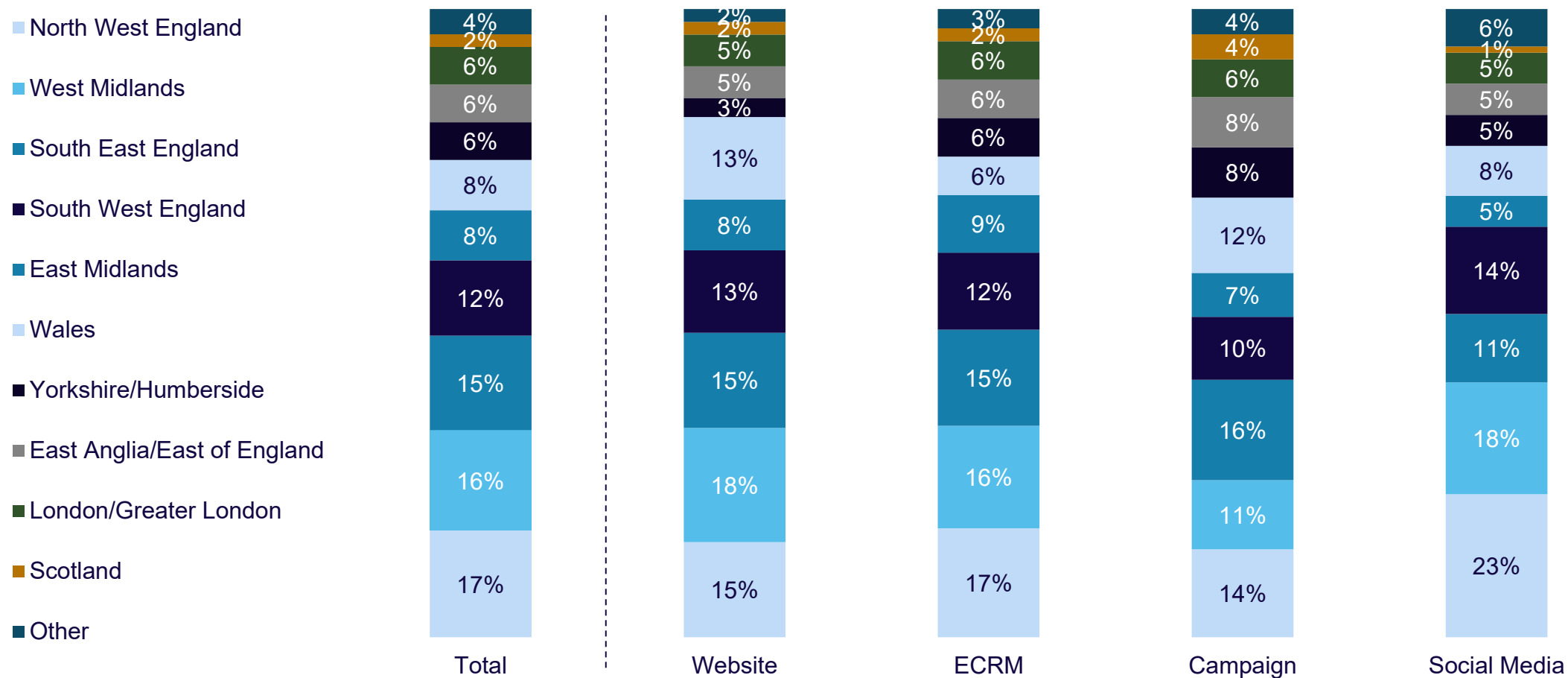


X2. Please type in your age.

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=6208 (Website n=895, ECRM n=4211, Campaign n=687, Social Media n=415).

England is the leading area of origin accounting for 89% of UK sample, with almost 1 in 5 of the sample coming from the North-West of England. Wales makes up 8% of the overall sample.

Region of residence



2023 TRIP CONVERSION AND RELATIONSHIP WITH WALES



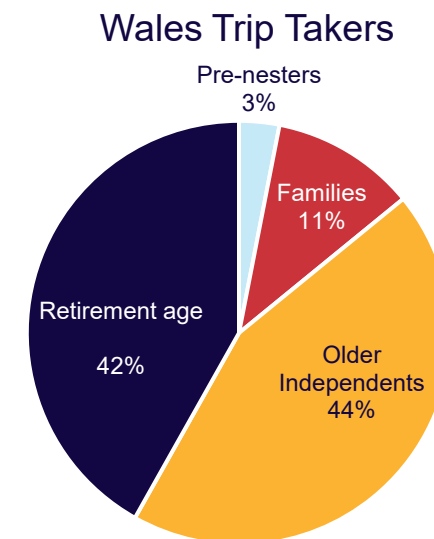
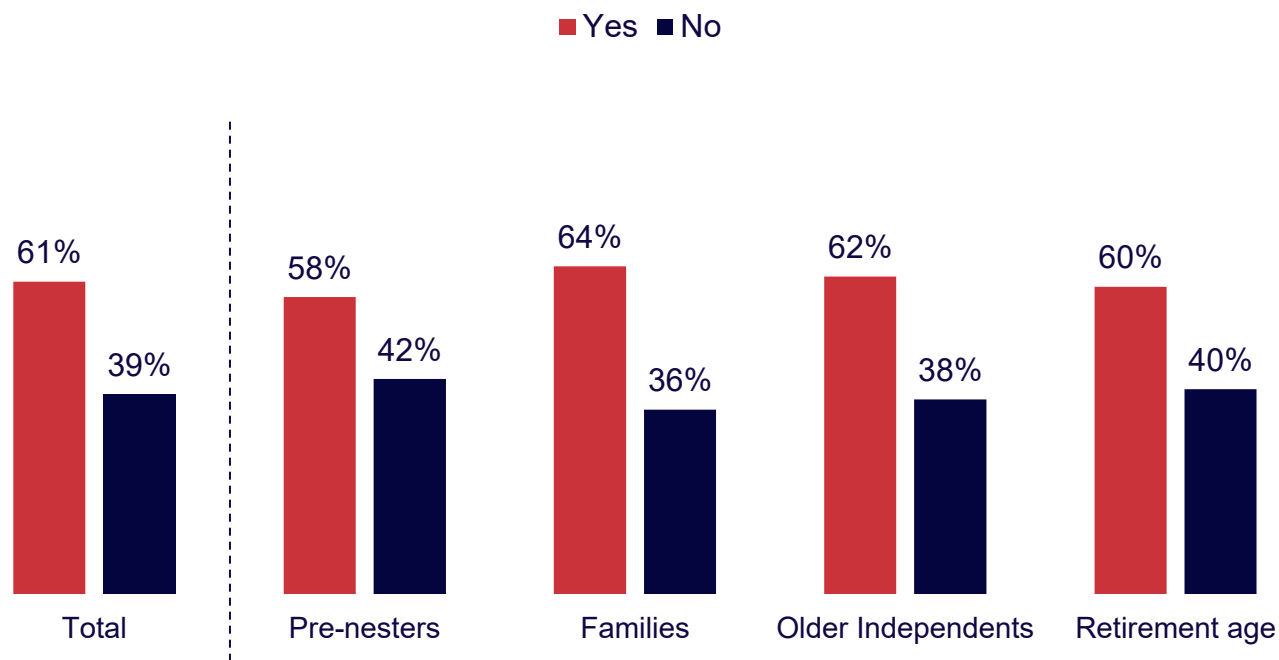
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Around 3 in 5 said that they'd taken a trip to Wales in 2023, which is consistent compared to last year and across life stages. When looking at the life stage split of trip takers, it aligns closely with the sample breakdown.

Whether took a short break or holiday in Wales in 2023

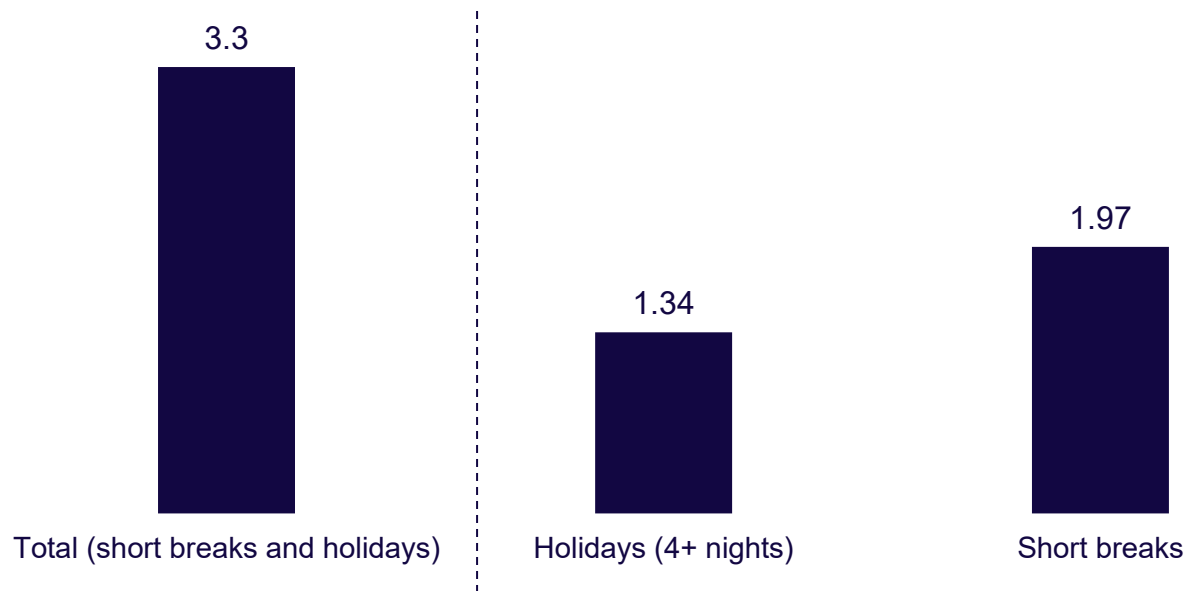


A2a. Did you take a short break or holiday in Wales in 2023?

Took a short break or holiday in Wales, n=5974 (Pre-nesters n=192, Families n=631, Older Independents n=2583, Retirement age n=2568).

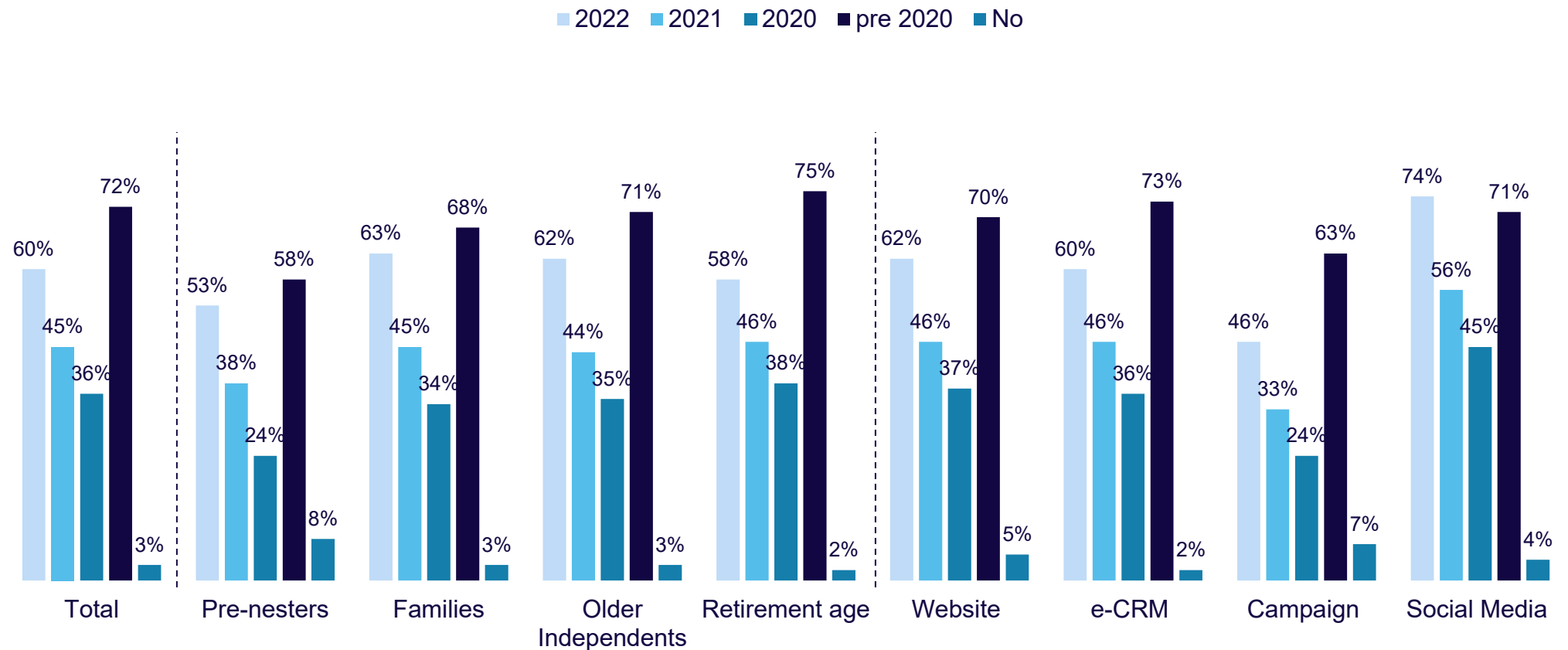
Those who visited Wales in 2023 trip takers took 3.3 short breaks or holidays to Wales on average in 2023.

Number of short break or holidays taken in Wales in 2023



Almost three-quarters of respondents took a trip to Wales before 2020, particularly those in Retirement Age. Families, Older Independents and Social Media enquirers are more likely to have taken a trip to Wales in 2022.

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=5974 (Pre-nesters n=192, Families n=631, Older Independents n=2583, Retirement age n=2568, Website n=876, e-CRM n=4074, Campaign n=618, Social Media n=406).



2023 trip conversion and relationship with Wales

Stable Visitation Rates

Around 3 in 5 of respondents reported taking a trip to Wales in 2023, maintaining the visitation rate of the previous year.

Historical Travel Patterns

Almost three-quarters of respondents had visited Wales before 2020, with a marked prevalence among those of retirement age.



2023 TRIP CHARACTERISTICS



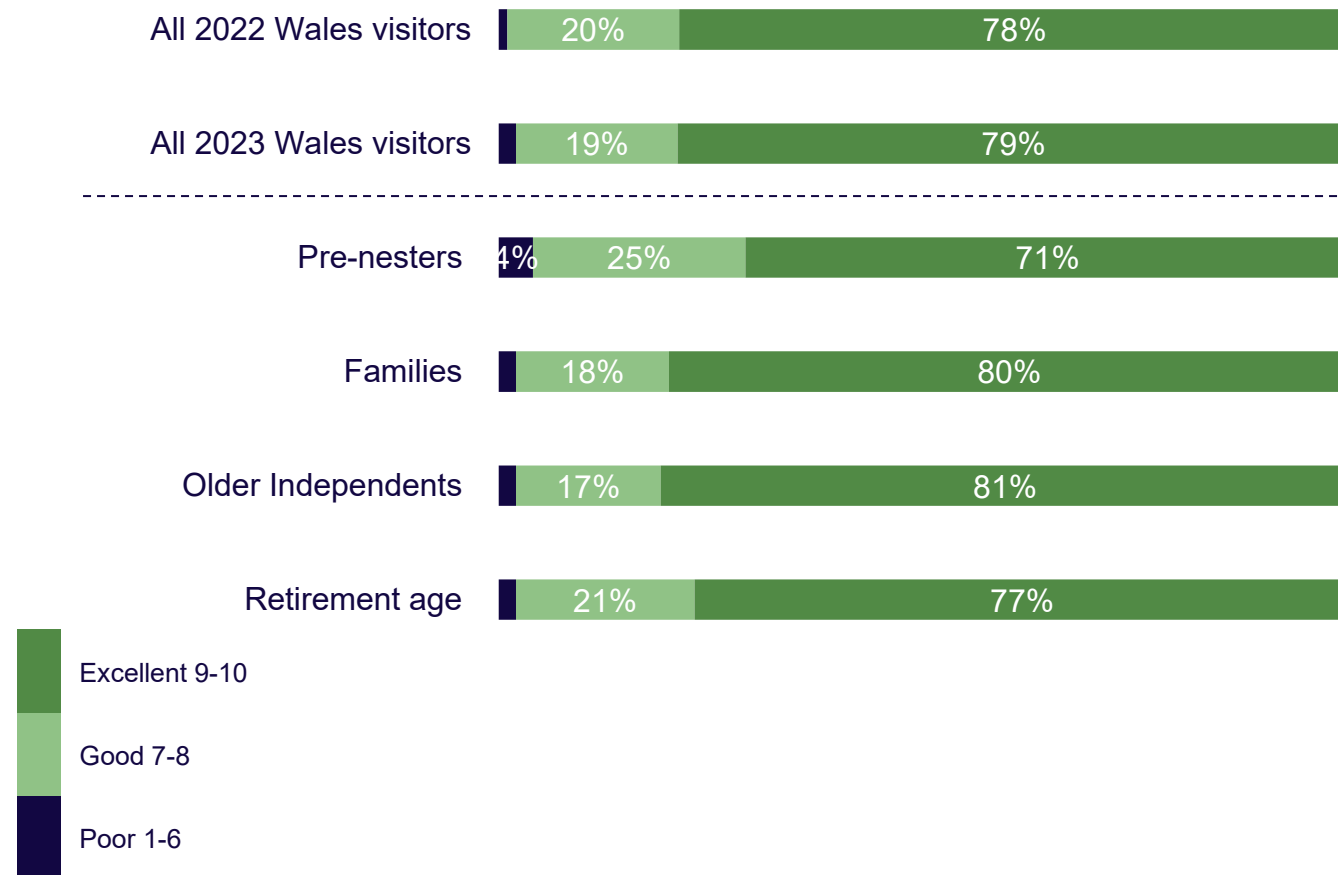
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Just under 4 in 5 Wales visitors rated their experience as 'Excellent', which was comparable to last year.

Rating of experience staying in Wales

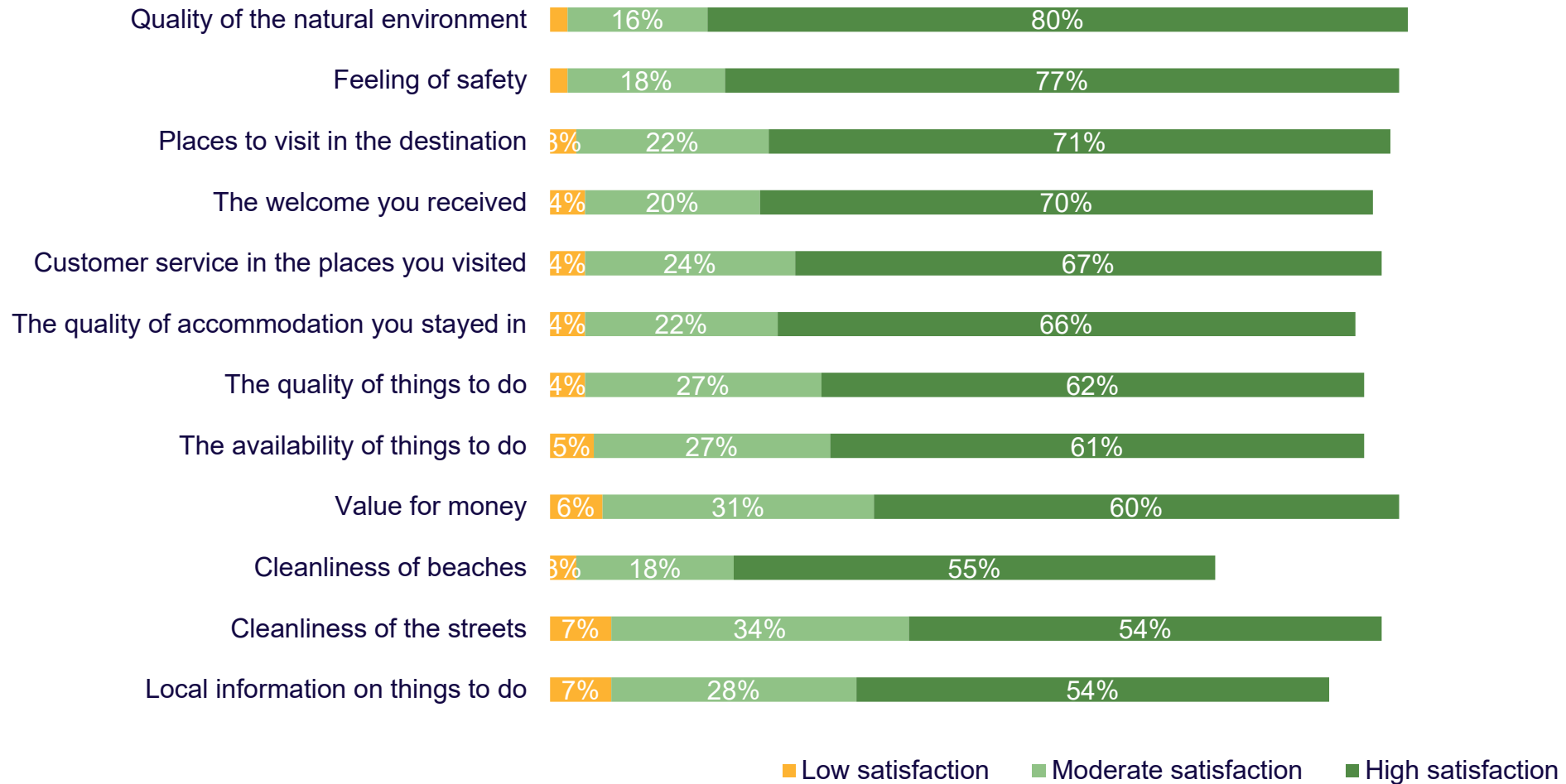


A15. Now going back to your trip to/within Wales in 2023, how would you rate your experience overall from 1 to 10 where 1 is very poor and 10 is very good? All 2023 Wales trip takers, n=3652 (Pre-nesters n=112, Families n=403, Older Independents n=1609 and Retirement age n=1528).



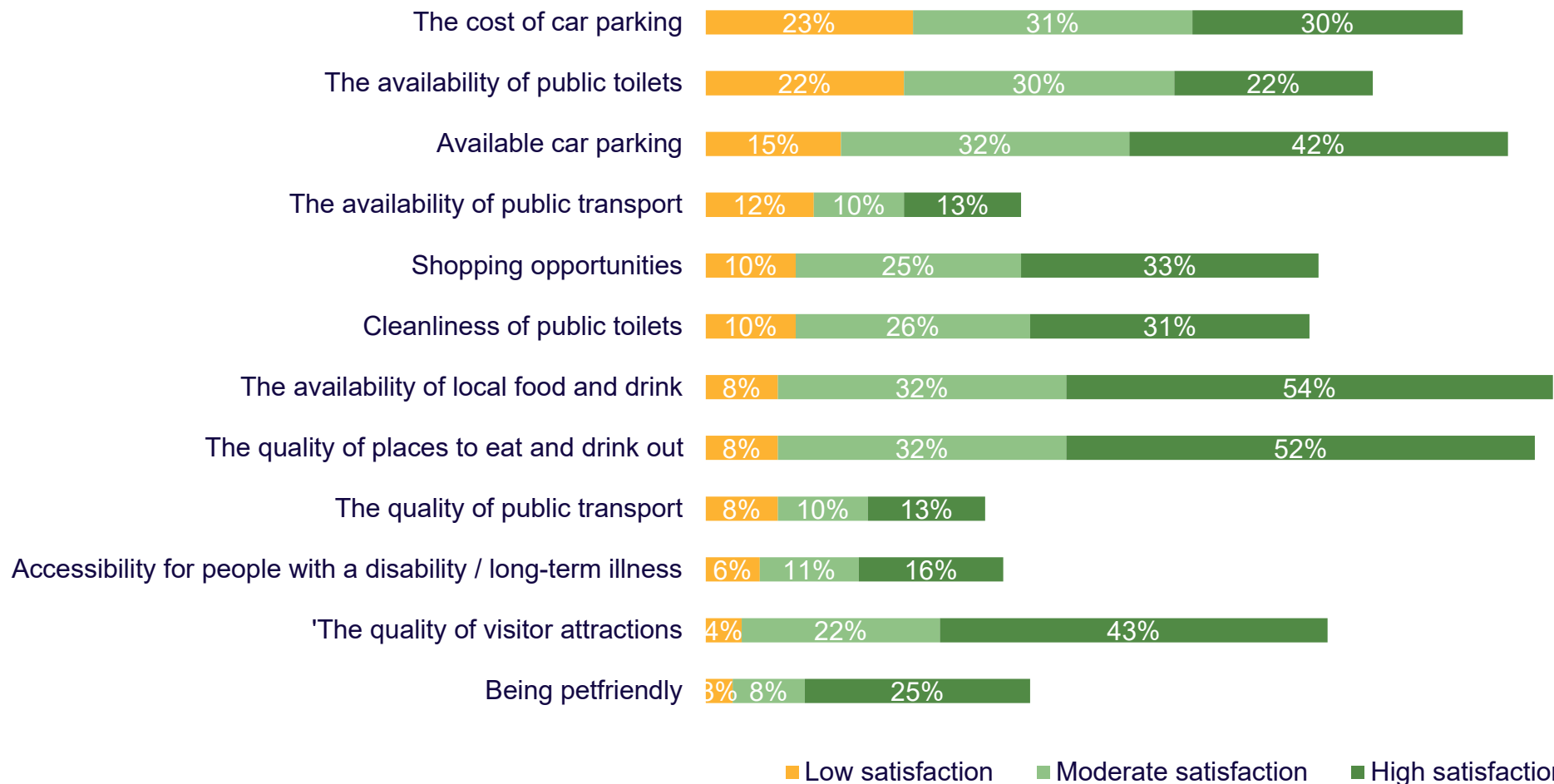
2023 Visit Wales trip takers were most satisfied with the quality of the natural environment, the feeling of safety and the places to visit.

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



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

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



Nearly half chose to visit Wales as they've been before and wanted to return, with nature and rest as other key drivers.

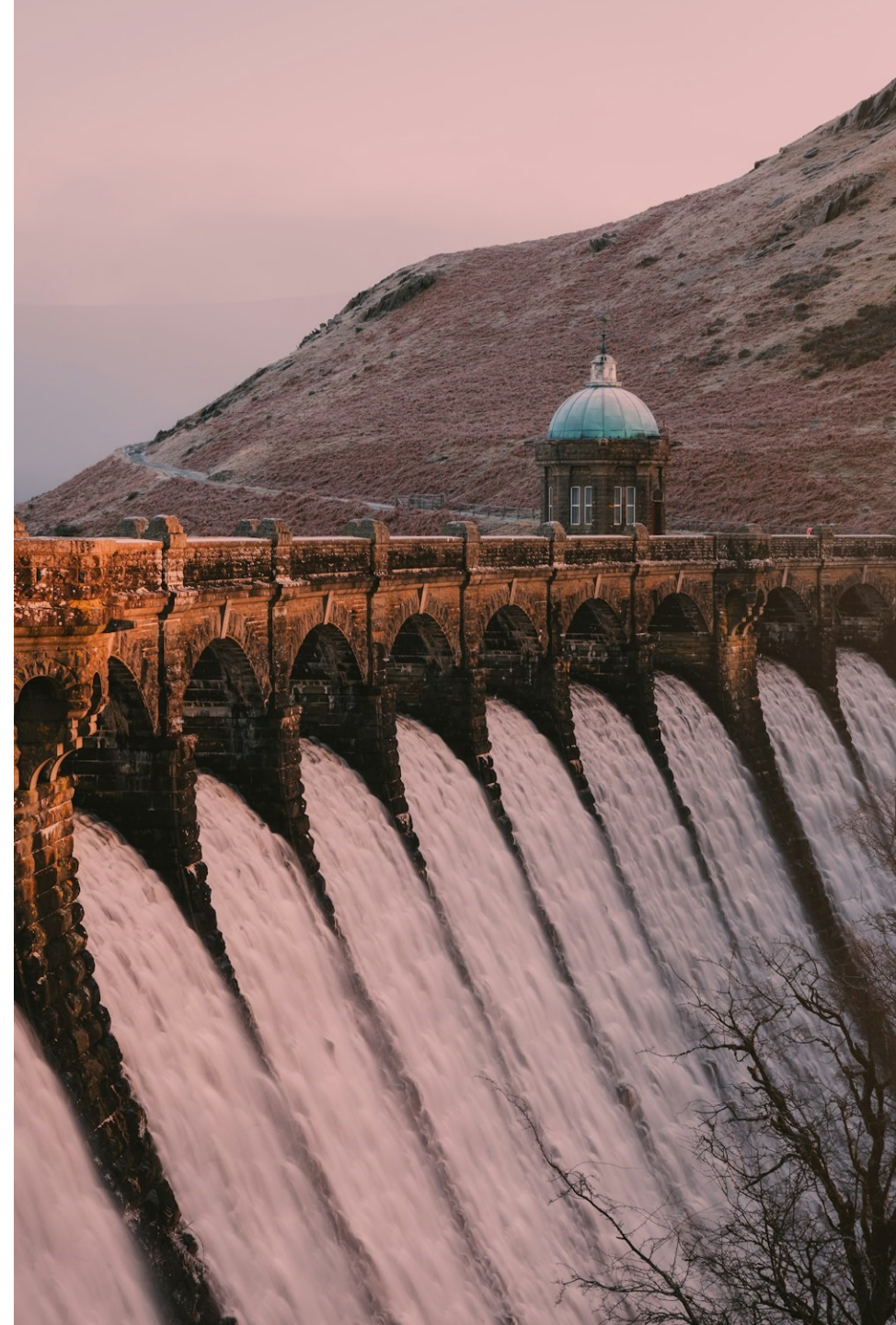
Reasons for choosing Wales as a destination

I have been before and wanted to go again **48%**



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=3652. Charted high to low based on average.



Pre-Nesters and Older Independents are most likely to go to connect with nature. Spending time with family is important too, particularly for Families.

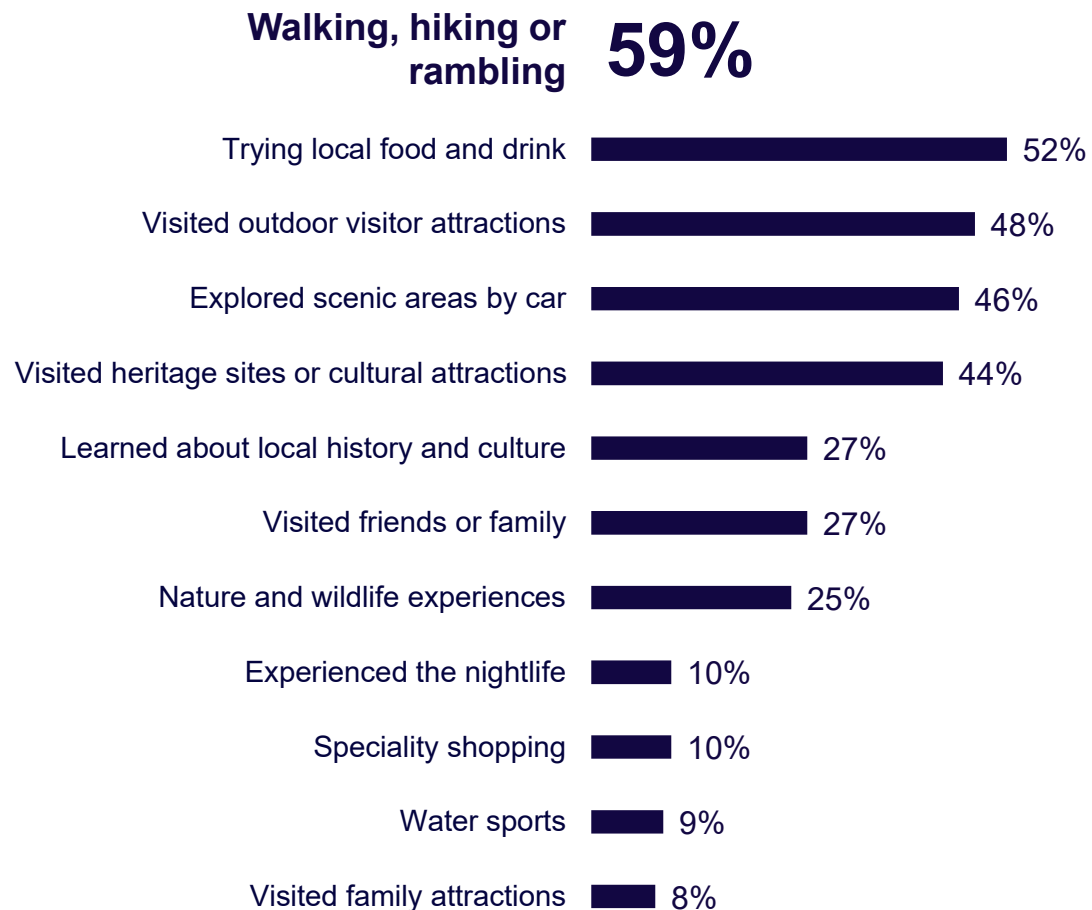
REASONS FOR CHOOSING WALES - BY LIFESTAGE

	Pre-nesters	Families	Older Independents	Retirement age
↑ Top 5 reason	To connect with nature/ be outdoors	Spend time with family or friends	To connect with nature/ be outdoors	I have been before and wanted to go again
	Spend time with family or friends	To connect with nature/ be outdoors	To get away from it all and have a rest	To get away from it all and have a rest
	To get away from it all and have a rest	I have been before and wanted to go again	I have been before and wanted to go again	To connect with nature/ be outdoors
	Wanted to visit a part of Wales I hadn't been to before	To get away from it all and have a rest	Spend time with family or friends	Spend time with family or friends
	I have been before and wanted to go again	To experience the culture and heritage	To experience the culture and heritage	To experience the culture and heritage

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=3652 (Pre-nesters n=112, Families n=403, Older Independents n=1609, Retirement age n=1528). Charted high to low based on average.

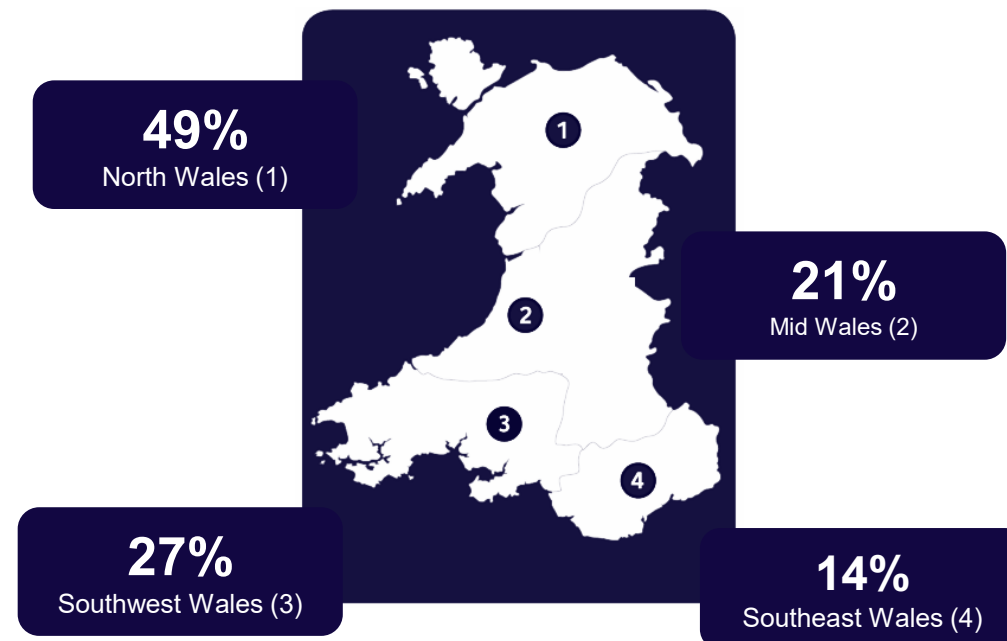
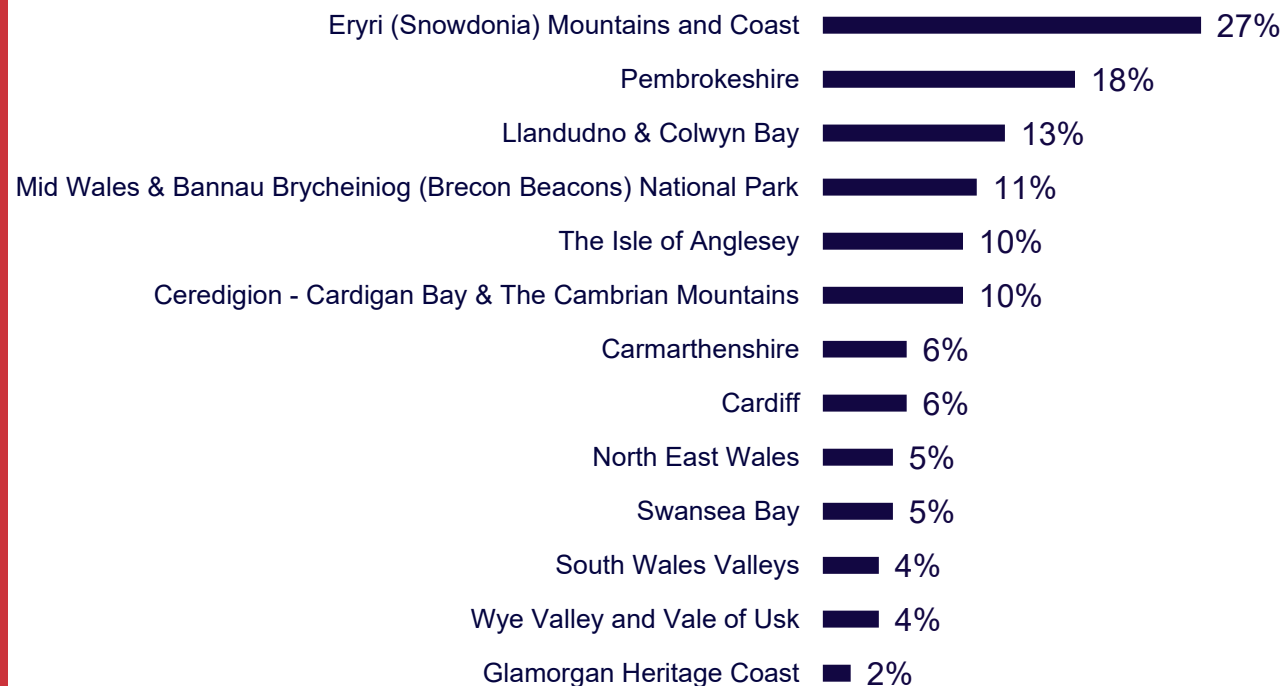
Walking, hiking or rambling is the most common activity in Wales, which aligns with the reasons (to connect to nature and be outdoors) for going to Wales.

Activities done in Wales in 2023, top 12



North Wales attracted the highest number of overnight visits, driven mostly by stays in Eryri (Snowdonia). Pre-Nesters are more likely to stay in Cardiff than other life stages.

Where in Wales did you stay?

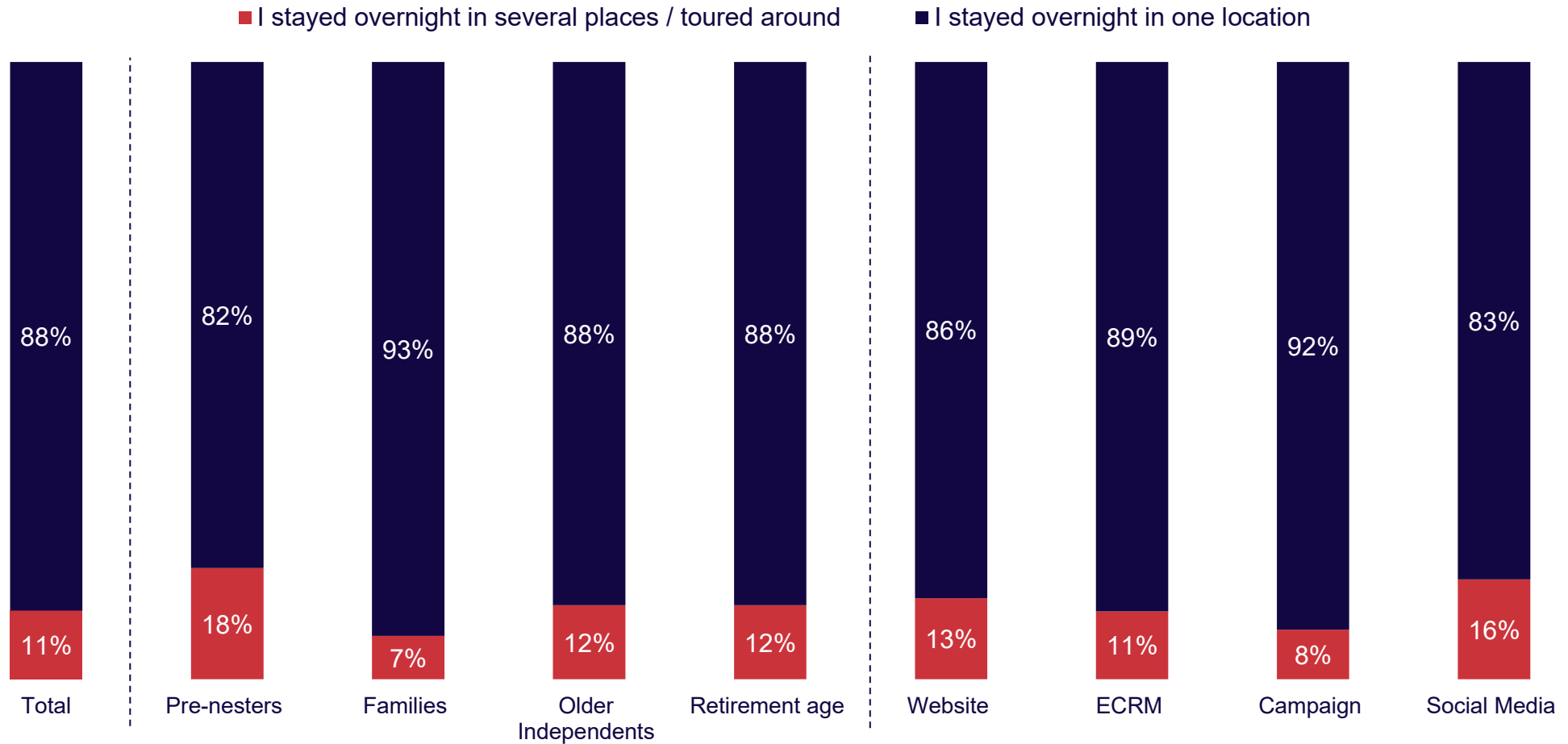


A12. Where in Wales did you stay overnight on this trip in [MONTH]? Please select all that apply. All 2023 Wales trip takers, n=3652.

North Wales = North East Wales, Llandudno & Colwyn Bay, Snowdonia Mountains & Coast, The Isle of Anglesey; Mid Wales = Mid Wales and the Brecon Beacons and Ceredigion; SW Wales = Pembrokeshire, Carmarthenshire and Swansea Bay; SE Wales = Cardiff, The Valleys of South Wales, Glamorgan Heritage Coast and Wye Valley

Almost 9 out of 10 Wales trip takers stayed overnight in just one location. Pre-nesters are the most likely to stay in multiple locations, with their 18% representing a +3% percentage point increase compared to last year.

Did you stay in one or several locations?

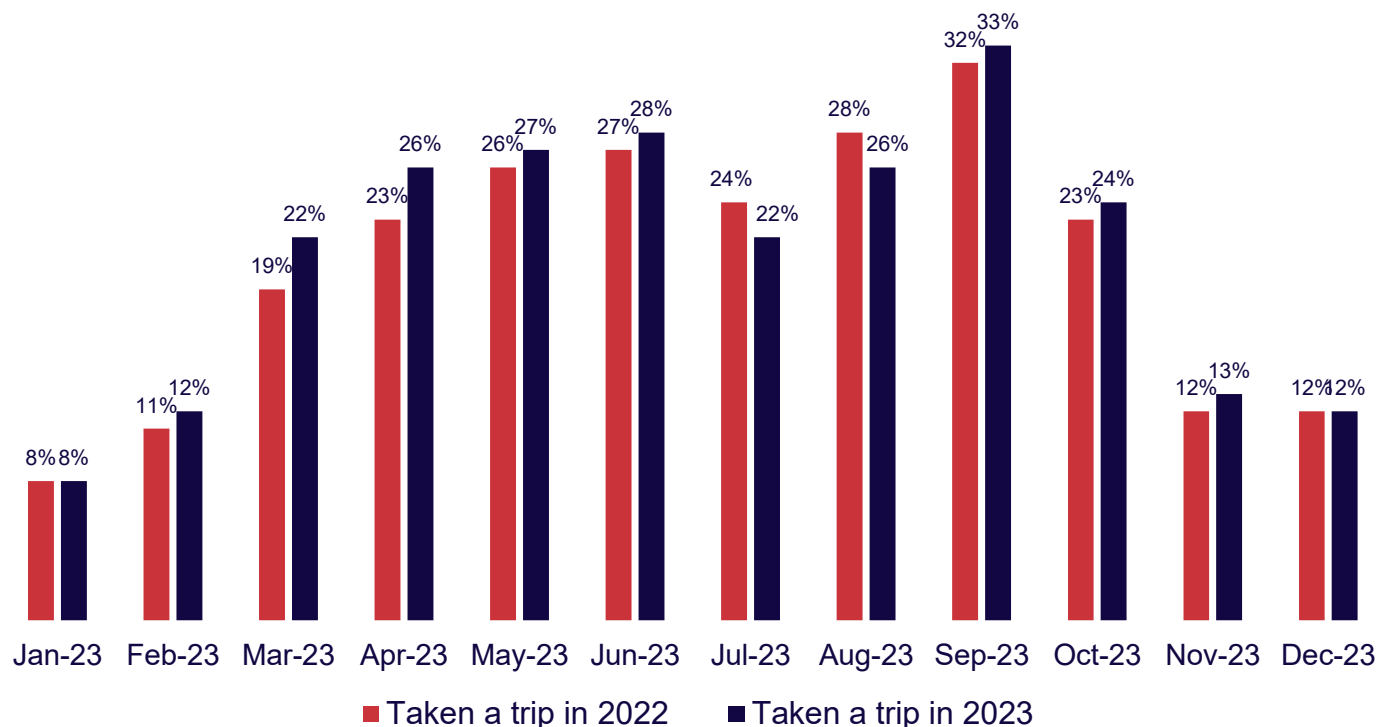


A13. Which of the below best describes your trip in Wales in 2023? All 2023 Wales trip takers, n=3652.

Total n=5974 (Pre-nesters n=112, Families n=403, Older Independents n=1609, Retirement age n=1528, Website n=675, e-CRM n=2377, Campaign n=285, Social Media n=315).

September was the most popular month to visit Wales in 2023, although the summer months were slightly down compared to the previous year with an increase in those opting to visit during Spring.

Month trip taken in Wales in 2022 or 2023

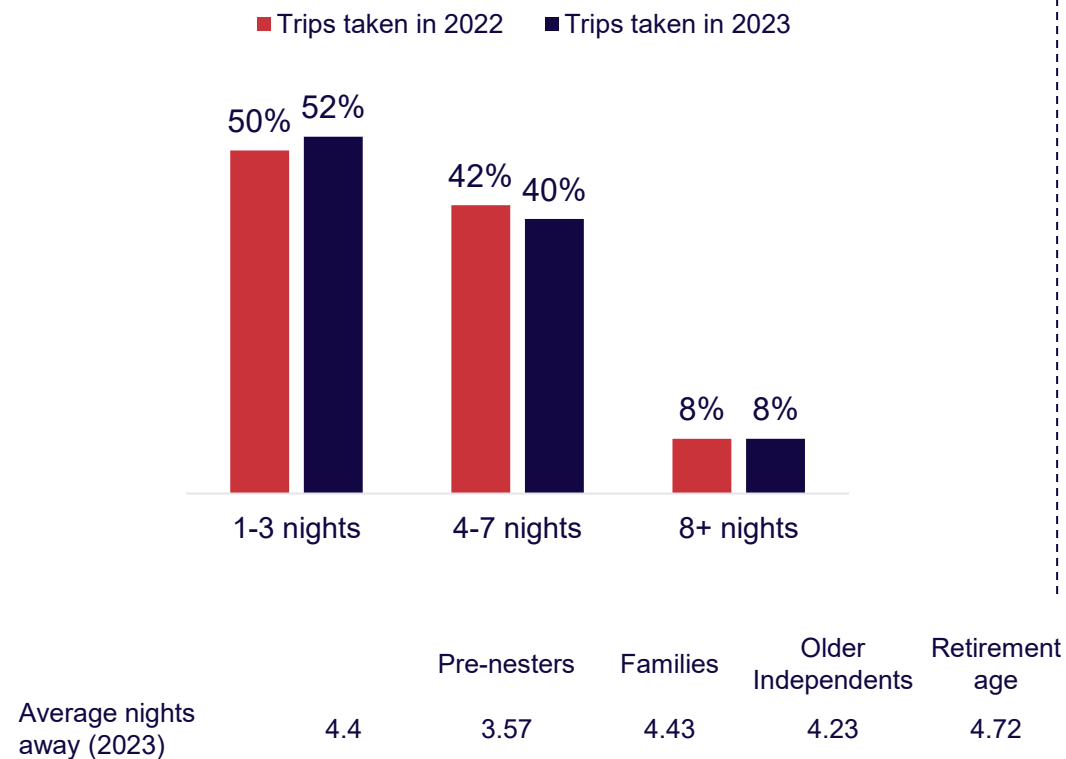


A4. And in which month(s) of the year did you visit Wales for a short-break or holiday in 2023?
All Wales trip takers, n=3256 (2022), n=3652 (2023).

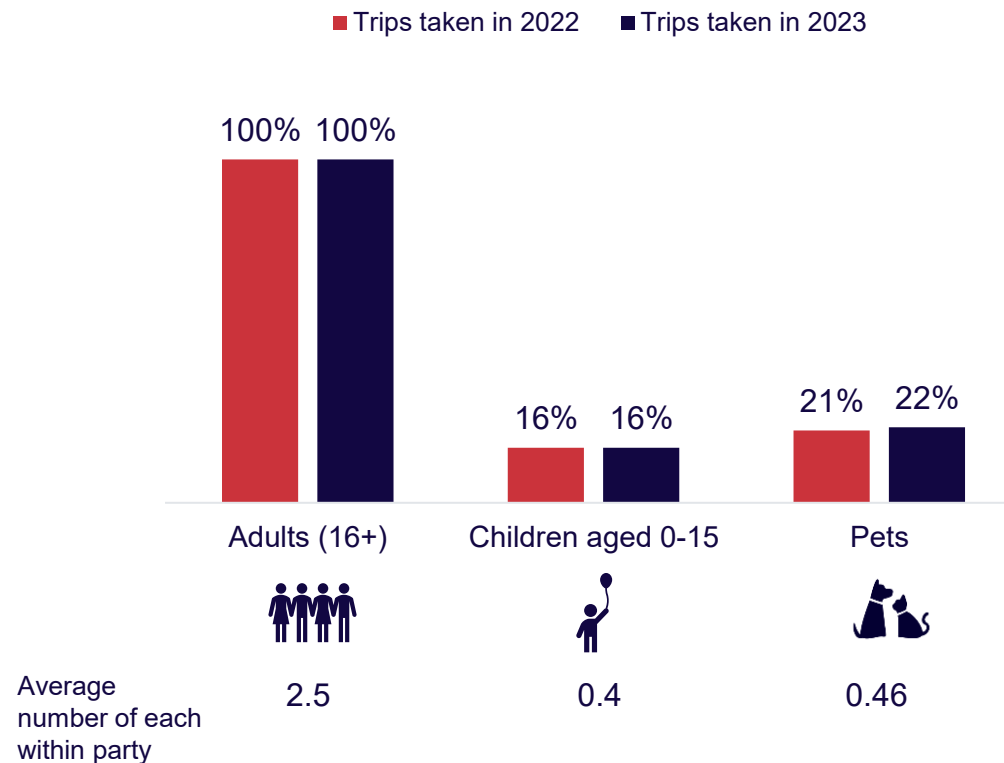


Wales trip-takers stayed an average of 4.4 nights – a very marginal decline compared to last year (4.5 nights). Pre-nesters tended to take shorter stays, whilst Retirees were more likely to stay more than 4 nights.

How many nights did you stay away for?



How many were there in your immediate party?

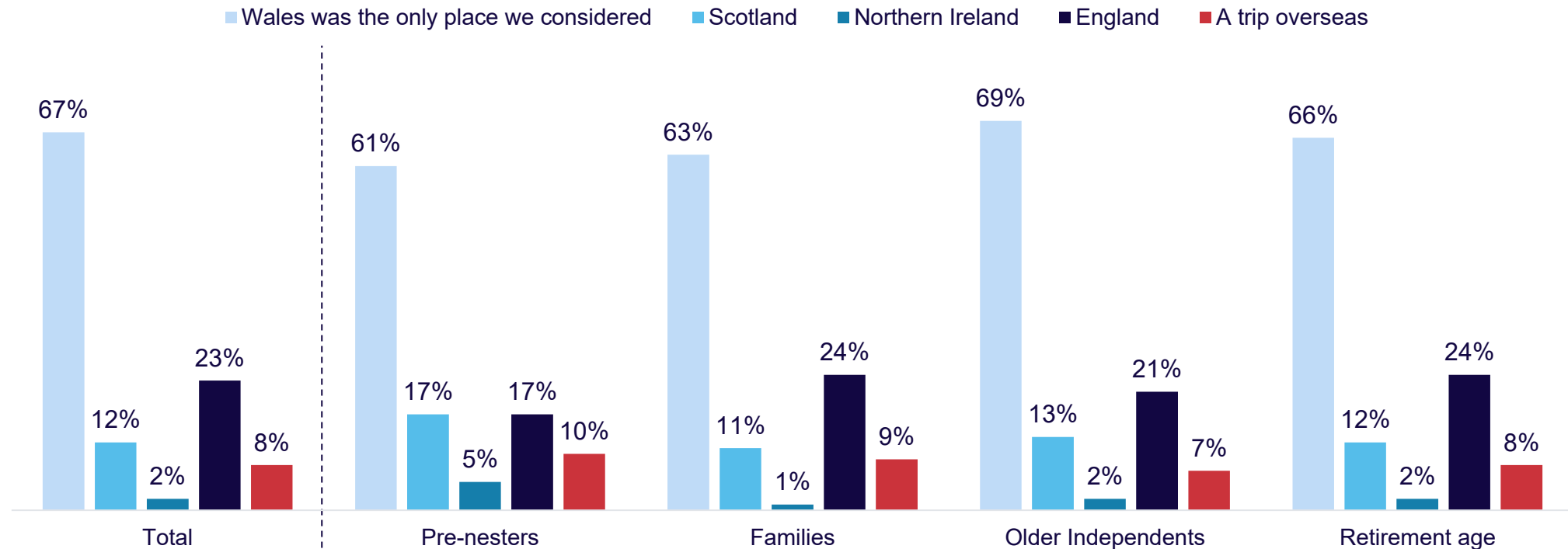


A5. On this overnight trip to/within Wales in 2023, how many nights did you stay away for?

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=3652.

67% of visitors to Wales didn't consider any other destinations for the trip – although almost a quarter considered adding another destination to the itinerary.

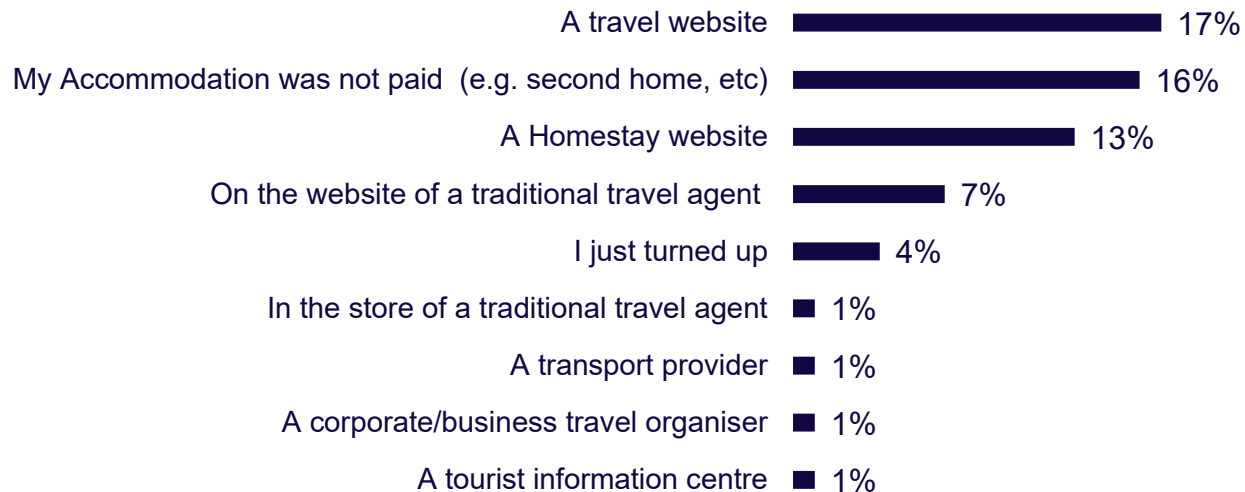
Competitive consideration, by lifestage



Half of trip takers booked their accommodation ‘directly with an accommodation provider’, comfortably making it the most common means of accommodation booking.

How accommodation was book for Wales trip

Directly with an accommodation provider **50%**

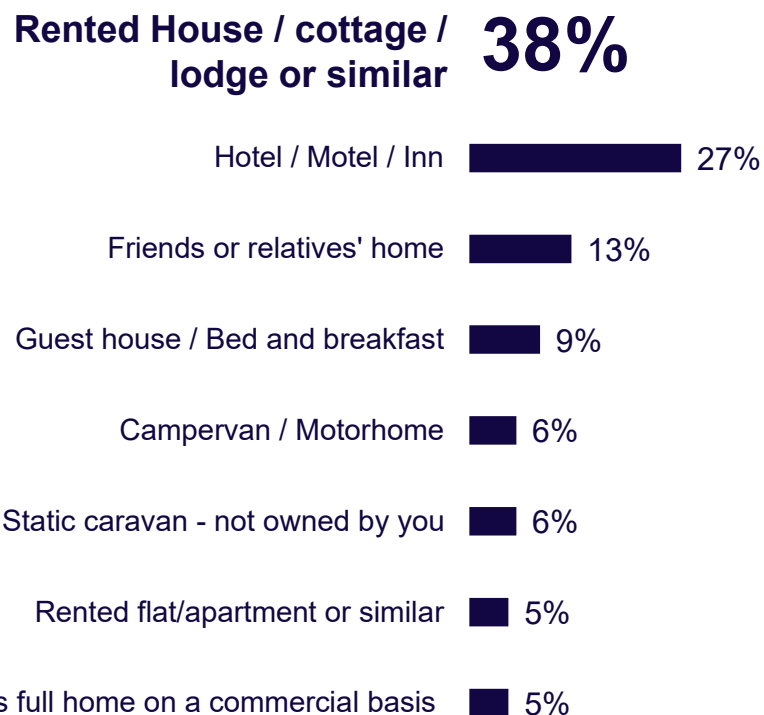


17% found information or contact details for the accommodation they stayed in on the Visit Wales website



'Rented Houses / Cottages' was the most popular accommodation type, followed by 'Hotels / Motels'.

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=3652. Charted high to low (top 8).





Understand the characteristics of trips taken in 2023

Visitor Satisfaction

The vast majority rate their experience as 'Excellent', which remained stable compared to last year.

Satisfaction Drivers

The quality of the natural environment, safety, and the variety of places to visit were the top satisfaction drivers. Dissatisfaction was primarily related to the cost and availability of parking and the availability of public toilets.

Visitor Preferences

North Wales, especially Eryri (Snowdonia), was the most popular destination. Seasonal preferences showed a slight shift towards spring visits, although September remained the peak month.



IMPACT OF VISIT WALES MARKETING



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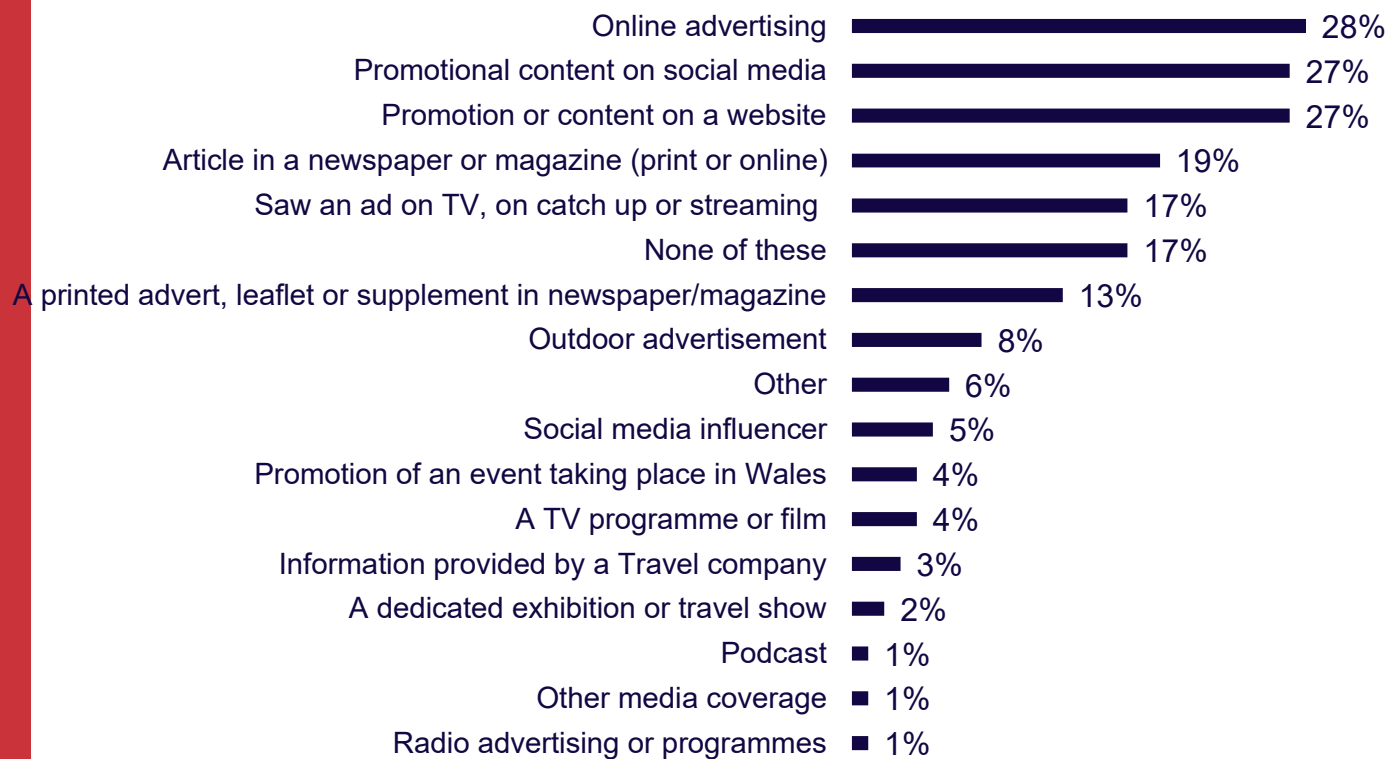
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Wales trip takers were most likely to have seen or heard about Wales through word of mouth, ahead of online advertising, social media and website content.

Communication exposure

Word of mouth **36%**



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=3652. Charted high to low.

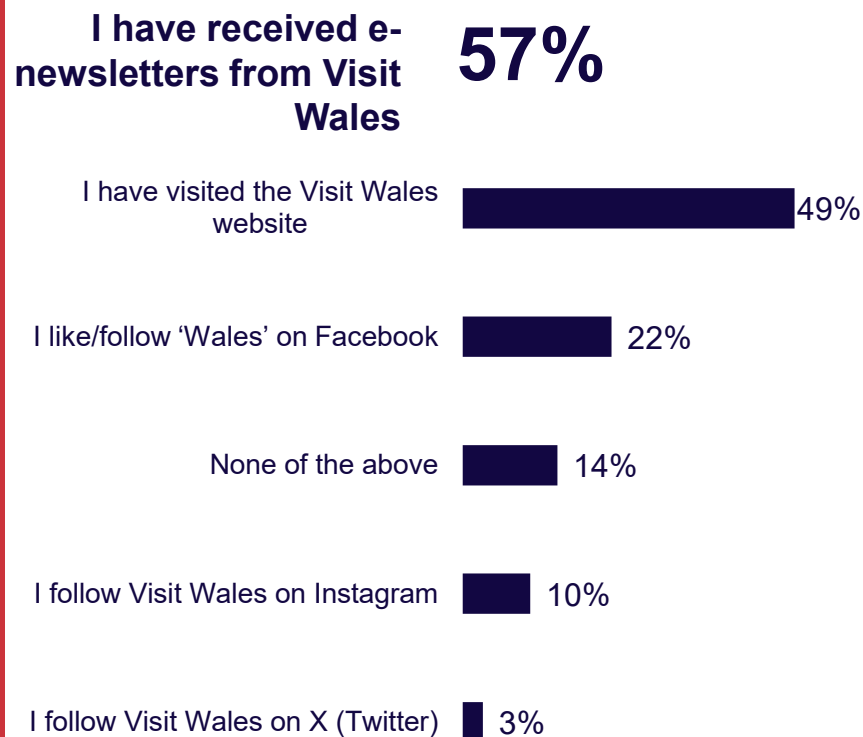
When looking at marketing to each life stage, whilst all have word of mouth as their number one, pre-nesters are much more digitally engaged and are more likely to be found via social media – newspaper articles are likely to reach retirees.

	Pre-nesters	Families	Older Independents	Retirement age
Top 5 ↑	Word of mouth/ conversations with others	Word of mouth/ conversations with others	Word of mouth/ conversations with others	Word of mouth/ conversations with others
	Online advertising	Online advertising	Online advertising	Promotion or content on a website
	Promotional content on social media	Promotional content on social media	Promotional content on social media	Online advertising
	Promotion or content on a website	Promotion or content on a website	Promotion or content on a website	Article in a newspaper or magazine (print or online)
	Article in a newspaper or magazine (print or online)	None of these	Saw an ad on TV, on catch up or streaming	Promotional content on social media

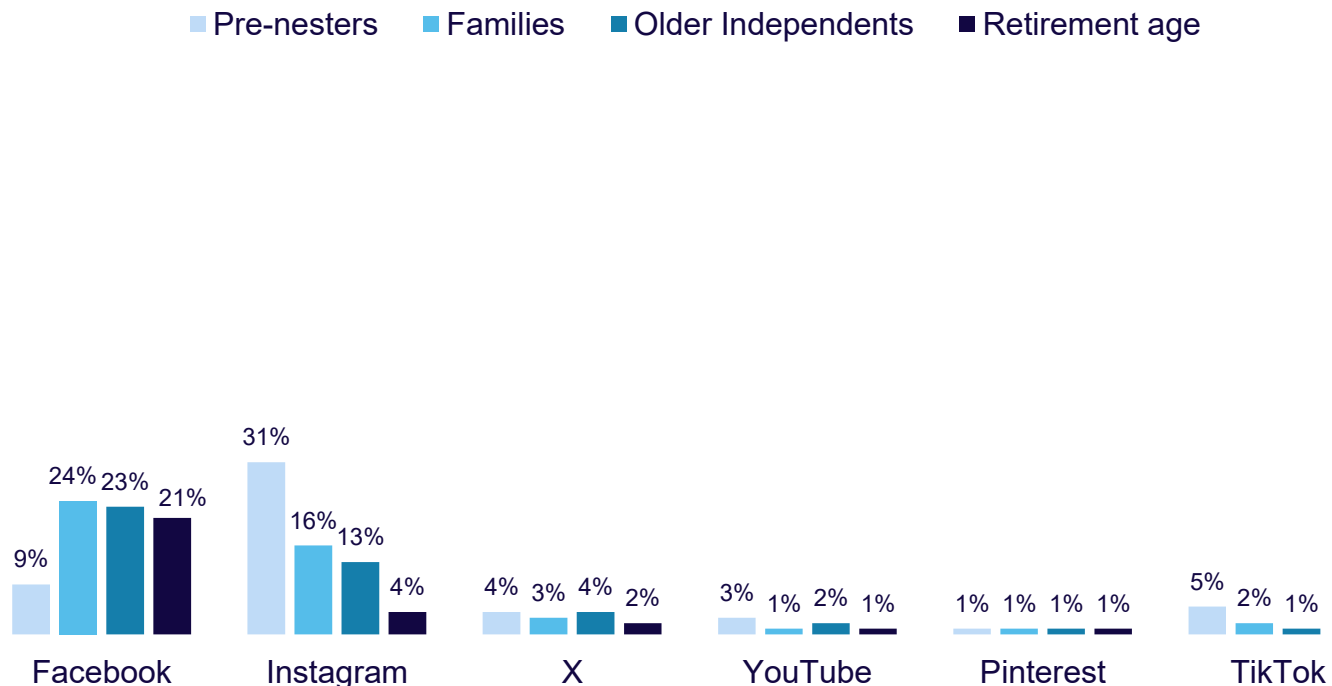
A18. Thinking about marketing and communications which, if any, of the following did you see or hear about Wales during 2023? (Pre-nesters n=112, Families n=403, Older Independents n=1609, Retirement age n=1528). Charted high to low.

E-newsletters from Visit Wales were the most popular way for potential visitors to be in contact with Visit Wales, followed by visiting the website. Facebook leads the way for social media overall, but 1 in 3 Pre-nesters engage via Instagram – representing a strong path to a hard-to-reach group.

Contact with Visit Wales



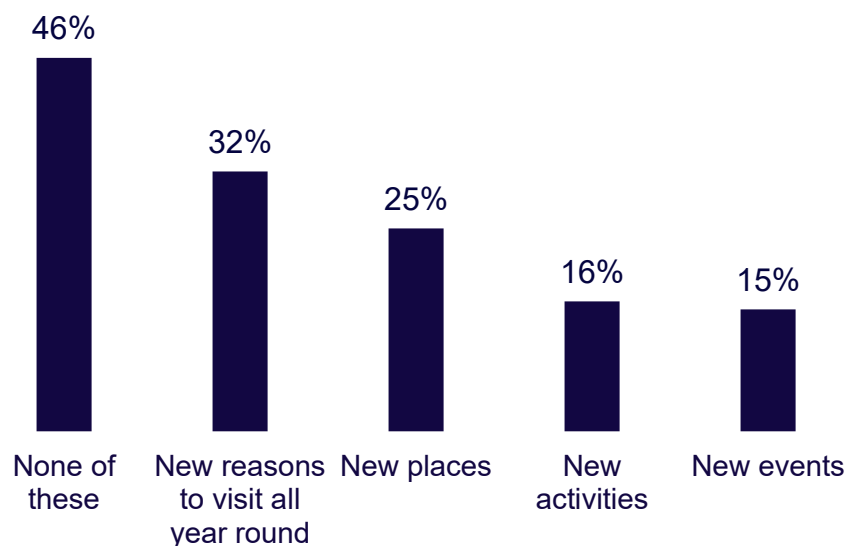
Social Media Platform Engagement by Life Stage



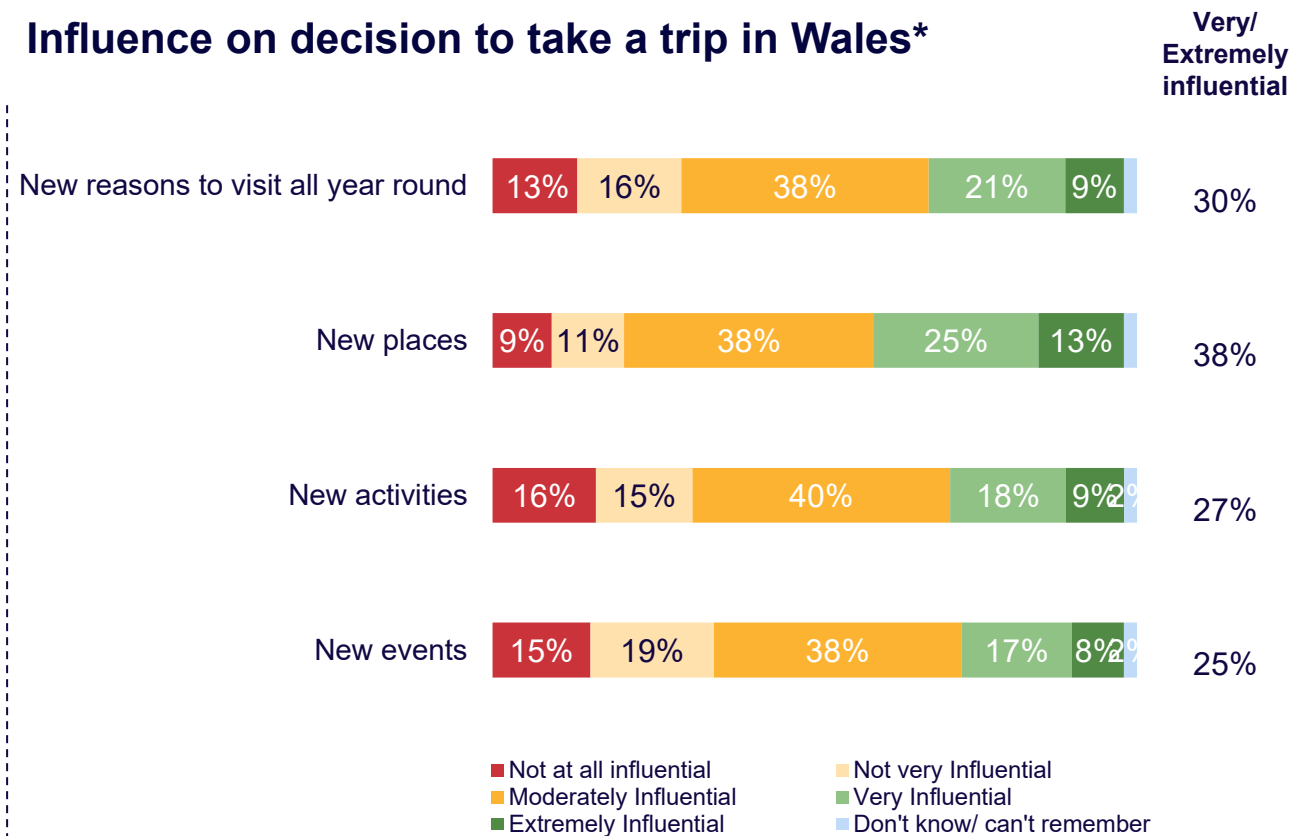
A19. Thinking about all contact you had with Visit Wales in 2023, which of the following apply to you? Charted high to low. All enquirers, n=6208 (Pre-nesters n=112, Families n=403, Older Independents n=1609, Retirement age n=1528).

Almost half saw no campaign related materials, but 1 in 3 did see communications related to reasons to visit all year round, around a third of whom found it influential.

See communications promoting Wales?



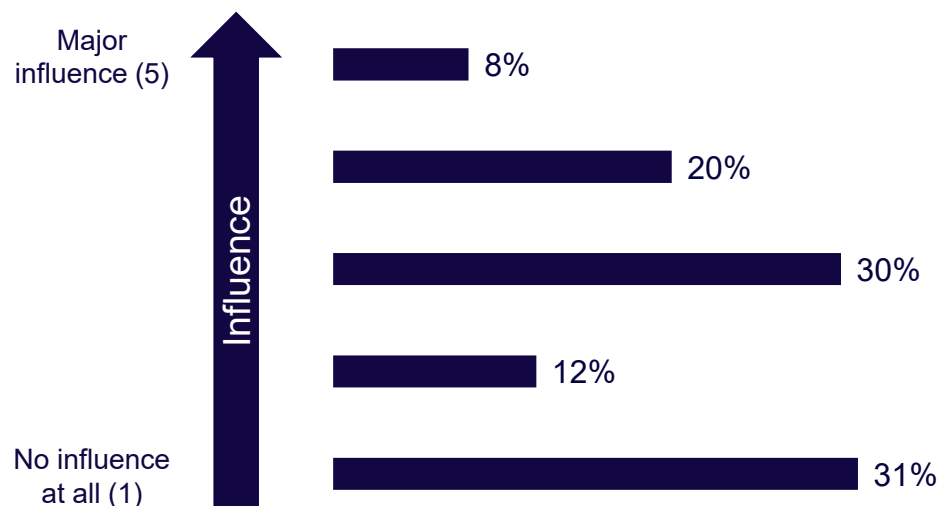
Influence on decision to take a trip in Wales*



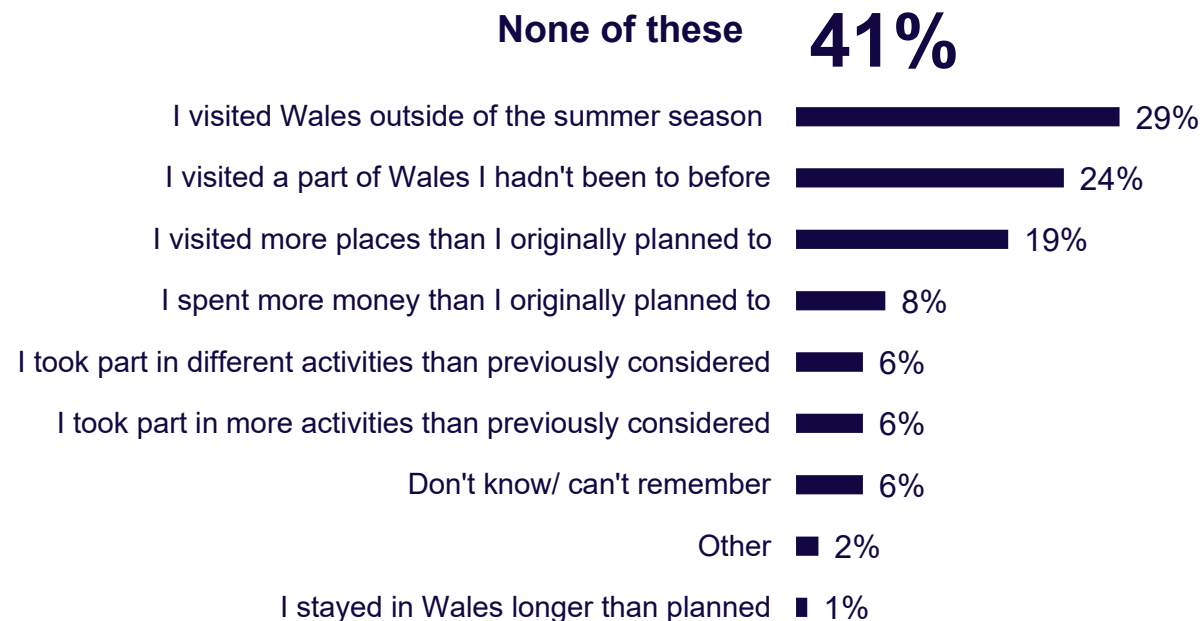
A23a. In 2023, did you see any communication promoting Wales in relation to the following? All 2023 Wales trip takers, n=3652 Charted high to low.
 A23b. And how influential were they on your decision to take a trip to/within Wales in 2023. All 2023 Wales trip takers, new places n=907, new reasons to visit all year-round n=1168, new activities n=572 & new events n=554.

Nearly 3 in 10 stated that Visit Wales communications were influential on their decision to take a trip to Wales. A further 3 in 10 also visited Wales outside the peak summer months, which aligns with communications promoting all year travel.

Influence of Visit Wales communications on trip decision



Influence of Visit Wales communications 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=3652. Charted high to low.

Almost three-quarters of trip takers had already decided to take a trip to 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 **72%**

I was considering visiting Wales in 2023, but had not made a final decision **22%**

I was not considering visiting Wales in 2023 **4%**



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=3652. Charted high to low.

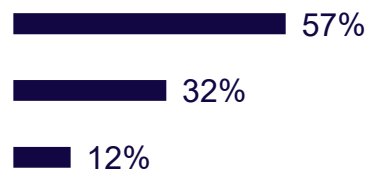


Visit Wales sees more traffic from mobile devices and most access the website at home.

On which device?

	 Laptop	 Mobile
At home	61%	70%
During a trip	21%	92%
At work	48%	68%

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=2980 at home, n=608 at work, n=1656 during a trip in Wales/elsewhere.



Impact of Visit Wales marketing

Influence of Communications

Around a third agreed that communications from Visit Wales had an influence on their decisions, particularly motivating them to visit outside of the summer season.

Engagement Channels

E-newsletters were the most popular method for staying informed about Wales. Social media also plays a prominent role. Facebook leads the way, though Instagram showed traction among pre-nesters.

Decision Timing

Almost three-quarters of trip takers had already decided by the end of 2022, highlighting the importance of early engagement in travel planning processes.



LIKELIHOOD OF VISITING WALES IN 2024



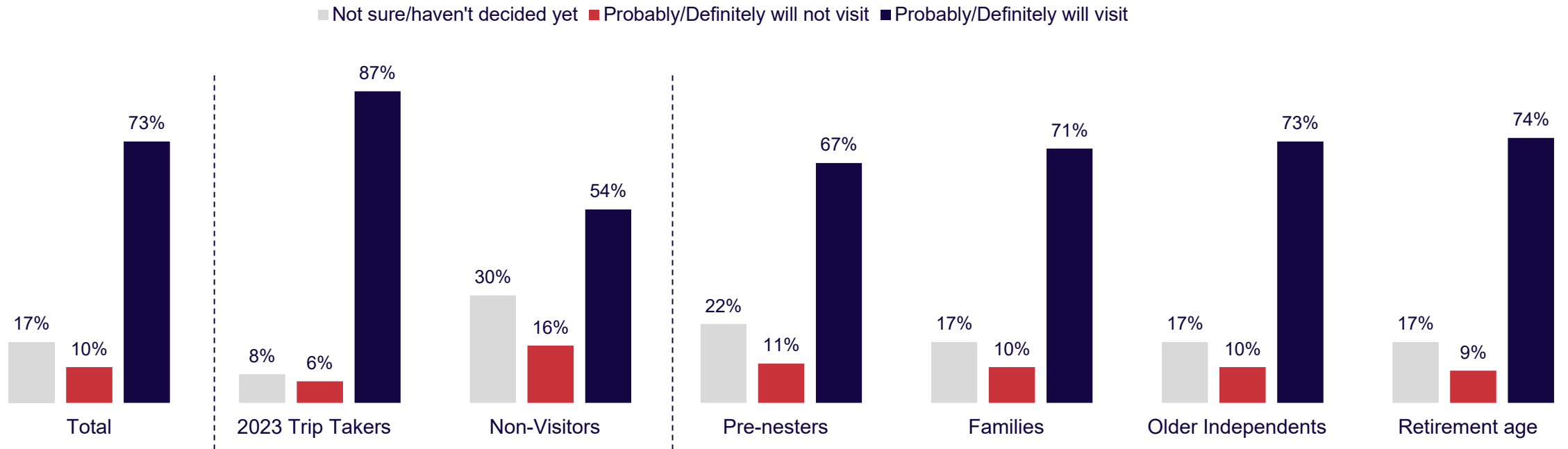
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The vast majority of trip-takers are intending to return in 2024 – more than half of non-visitors are intending to do the same. Retirees are more likely to plan a visit to Wales in 2024 compared to pre-nesters.

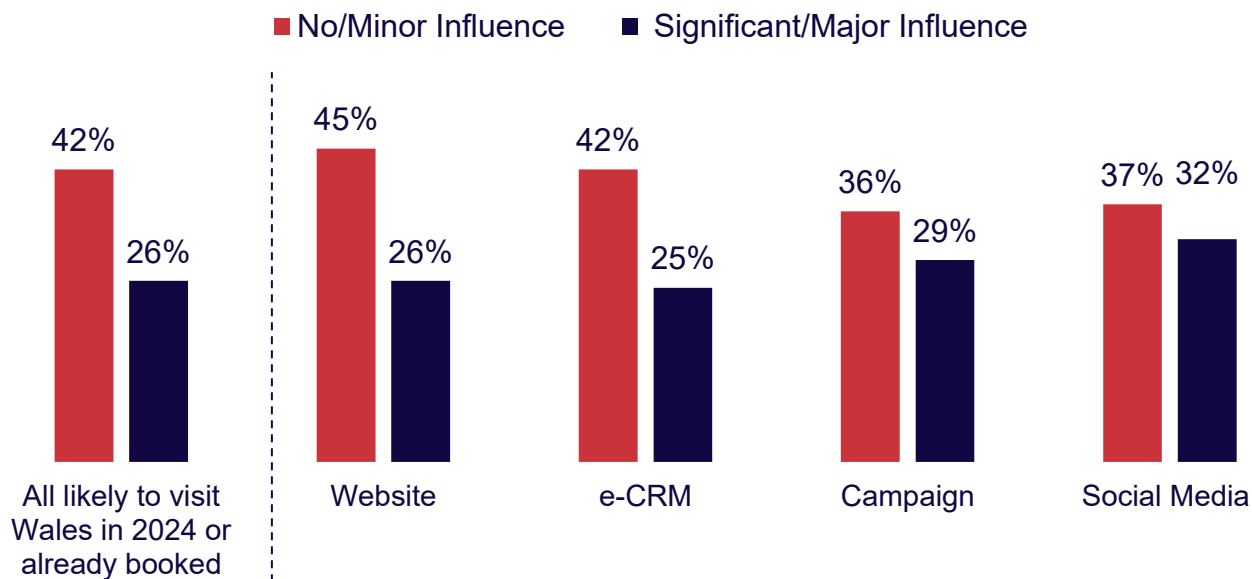
Likelihood of visiting Wales in 2024



B5. Are you intending to visit Wales for a short-break or holiday in 2024? Total, n=6208 (Wales Trip Takers n=3652, Non-visitors n=2556, Pre-nesters n=228, Families n=659, Older Independents n=2692, Retirement age n=2629).

A quarter of trip intenders indicate that Visit Wales communications have influenced their decision to take a trip to Wales in 2024. The social media sample are more likely to be influenced.

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

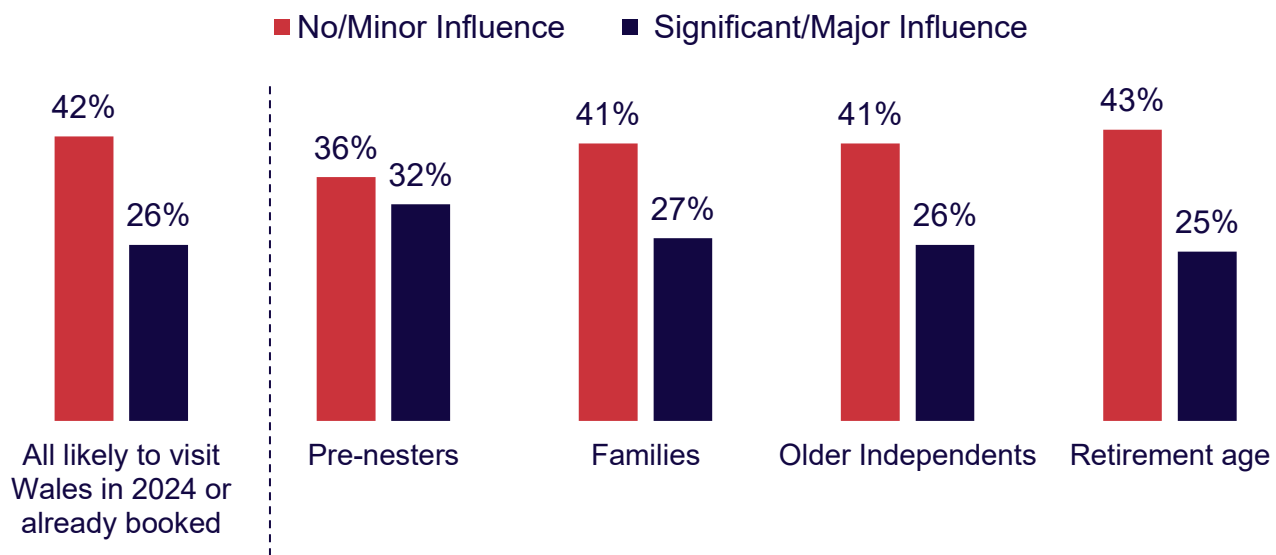


B10. On a scale of 1 to 5 where 1 means 'no influence at all' and 5 means 'a major influence', what influence, if any, has Visit Wales communications had on your decision to take a holiday or short break <vacation> in Wales in 2024? All likely to visit Wales in 2024 or already booked, n=4548 (Website n=703, e-CRM n=3078, Campaign n=407, Social Media n=360).

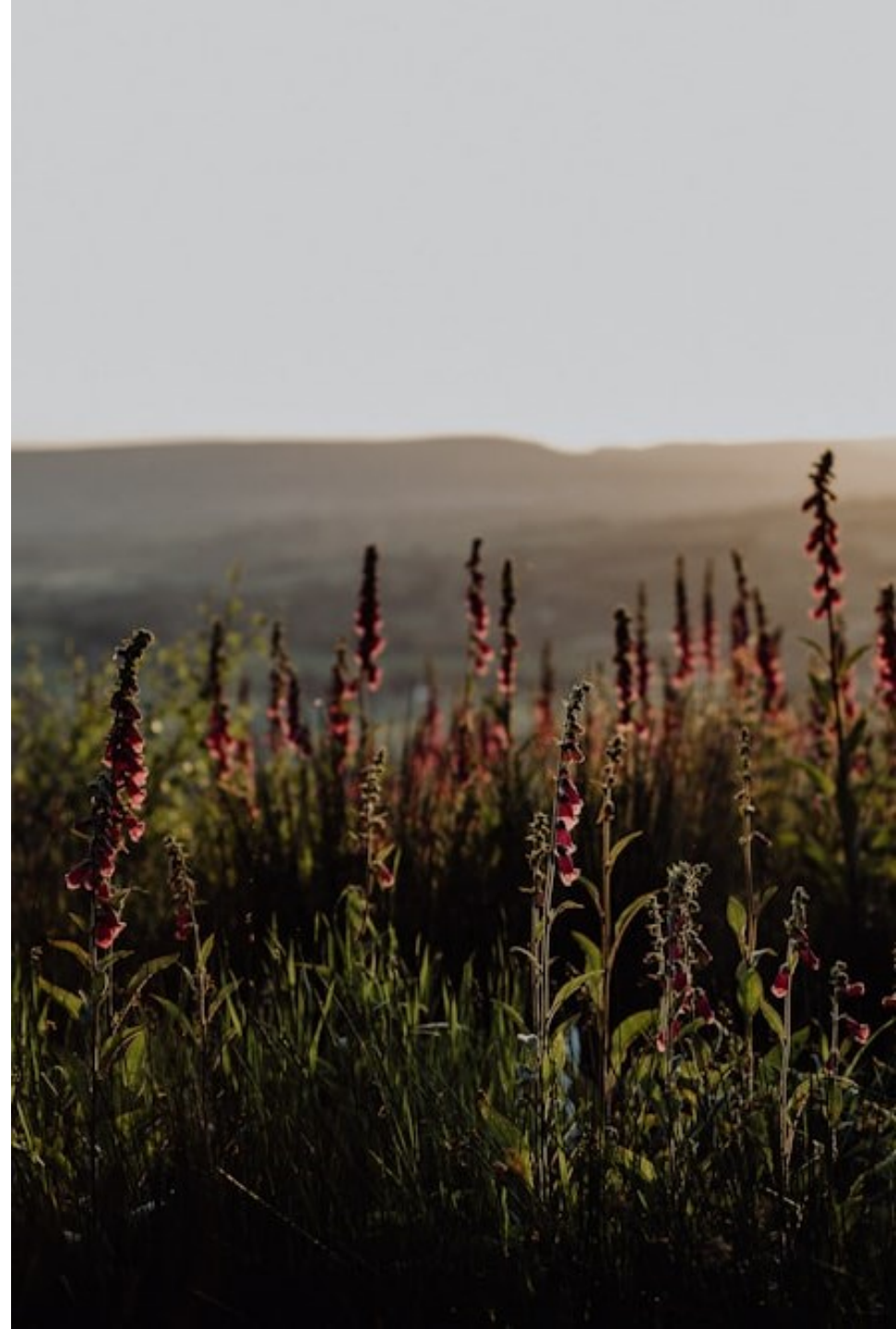


There are minimal differences by life stage.

Influence of Visit Wales communication on trip decision, by lifestage

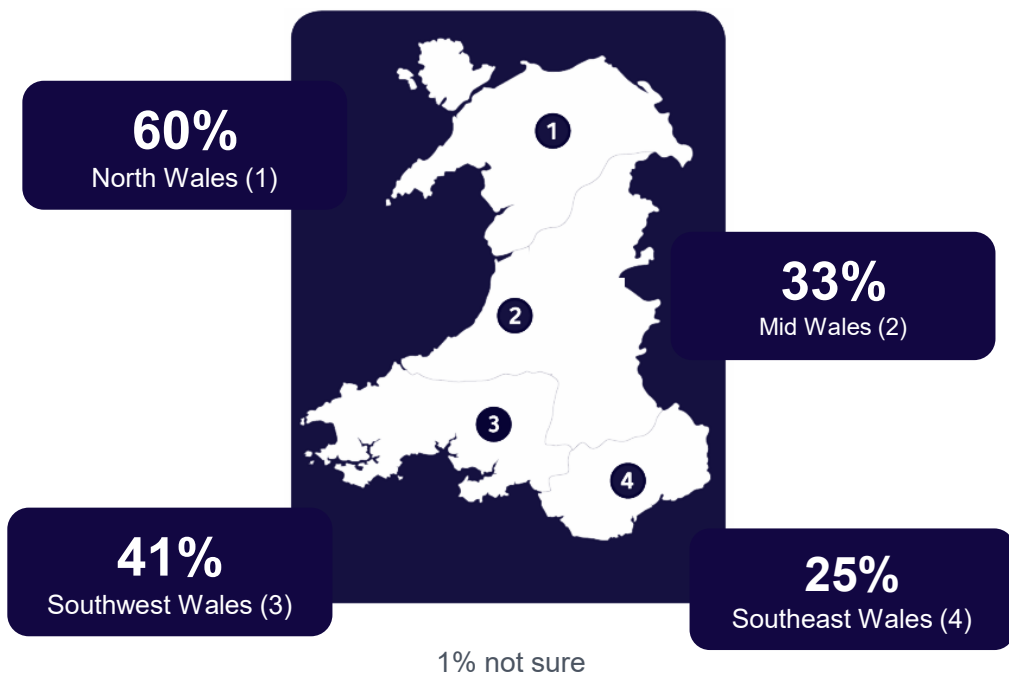


B10. On a scale of 1 to 5 where 1 means 'no influence at all' and 5 means 'a major influence', what influence, if any, has Visit Wales communications had on your decision to take a holiday or short break <vacation> in Wales in 2024? All likely to visit Wales in 2024 or already booked, n=4548 (Pre-nesters n=152, Families n=473, Older Independents n=1985, Retirement age n=1938).

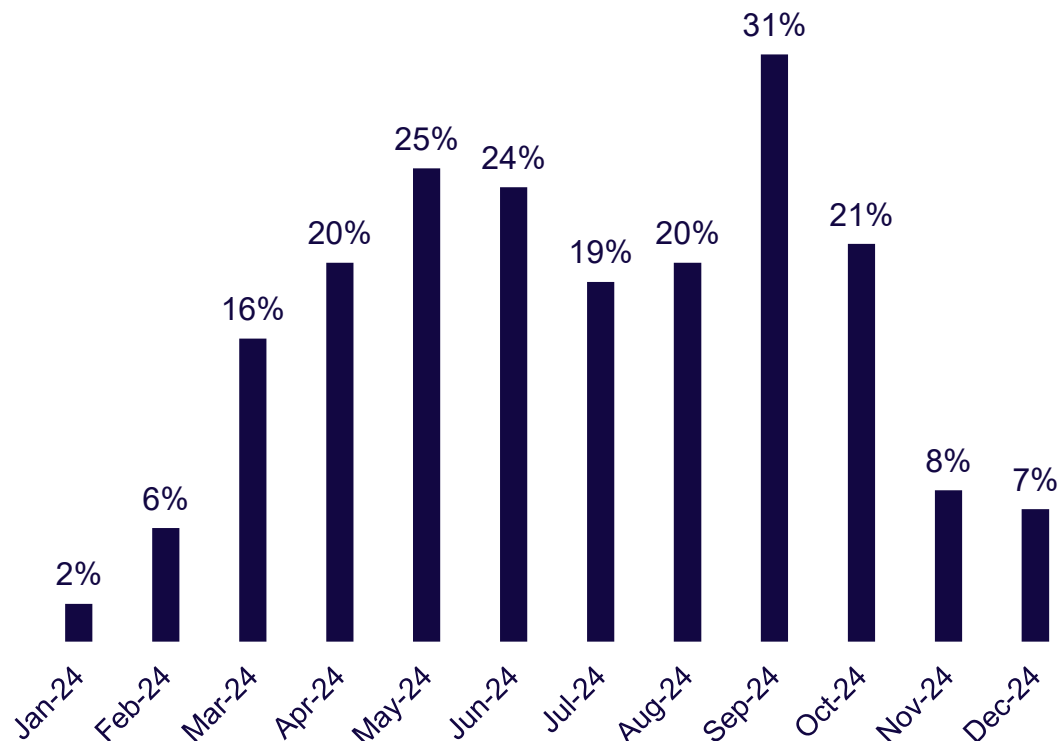


North Wales remains the top destination for 2024, with 3 in 5 trip intenders planning to visit. September looks set to be the busiest month for tourism, with Spring also a popular time to visit.

Where in Wales do you plan on visiting in 2024?



Planned month of visit

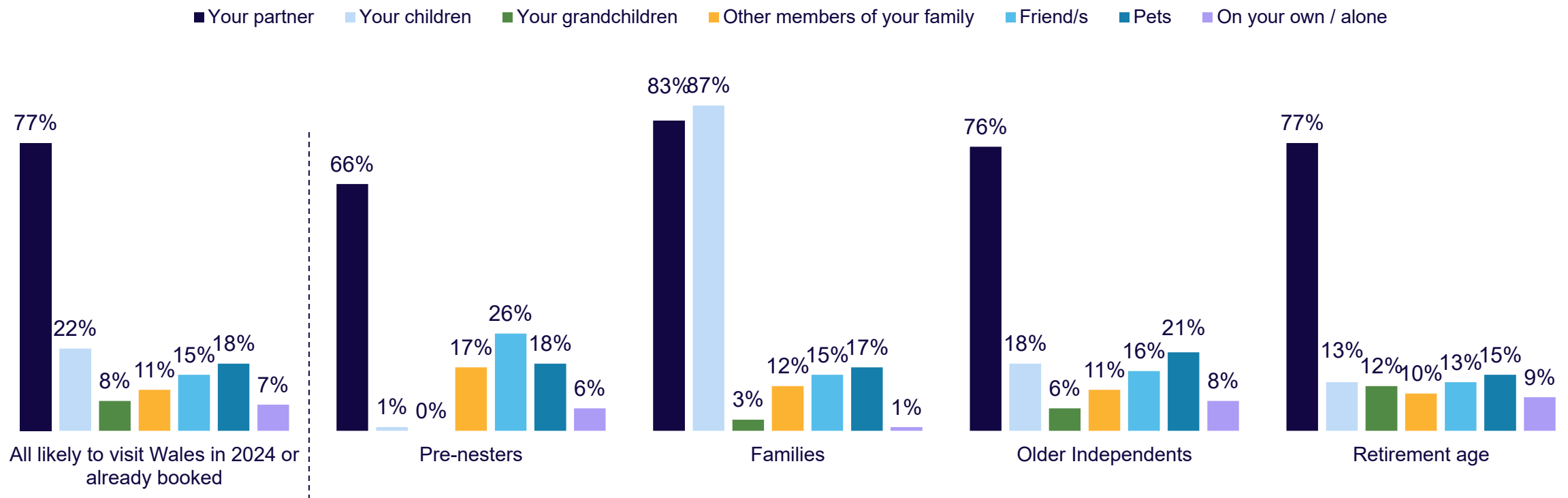


B8. Which of these areas do you plan on visiting on your next holiday or short break in Wales in 2024?

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=4548.

Just over three-quarters of 2024 trip intenders plan to visit Wales with their partner. Families are most likely to plan to visit Wales with their partner and children, while pre-nesters are more likely to visit with their friend(s) and retirees with their grandchildren.

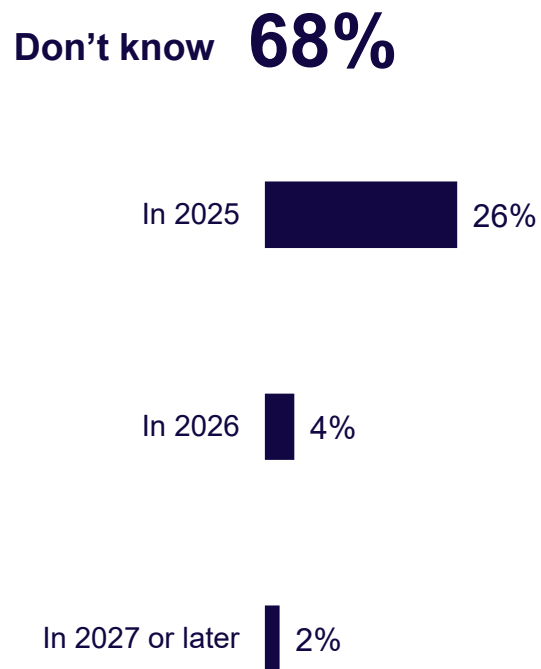
Party make-up for Wales trip in 2024, by lifestage



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=4548 (Pre-nesters n=152, Families n=473, Older independents n=1985 and Retirement age n=1938).

Of those unlikely to visit Wales in 2024, 68% stated they 'don't know' when they would visit Wales. A quarter stated they would visit in 2025.

Next likely to visit Wales?



Understand the plans for trips in 2024

High Return Intent

The majority who visited Wales in 2023 intend to return in 2024. Retirees are the group who are most likely to plan to re-visit.

Influence of Communications

26% of potential visitors have been influenced by Visit Wales communications to plan to take a trip to Wales in 2024.

Travel Companions

The trend for 2024 shows a preference for traveling with partners, with families likely to travel with children, pre-nesters with friends, and retirees with grandchildren.



REASONS FOR NOT TAKING A TRIP



Llywodraeth Cymru
Welsh Government

**KUBI
KALLOD**



Just under half of non-Wales trip takers in 2023 were considering an overnight trip in Wales in 2023. Over half of all non-Wales trip takers went somewhere else.

Wales visiting intentions by non-visitors to Wales



44%

Of those that didn't take a trip to Wales were considering an overnight trip in Wales in 2023

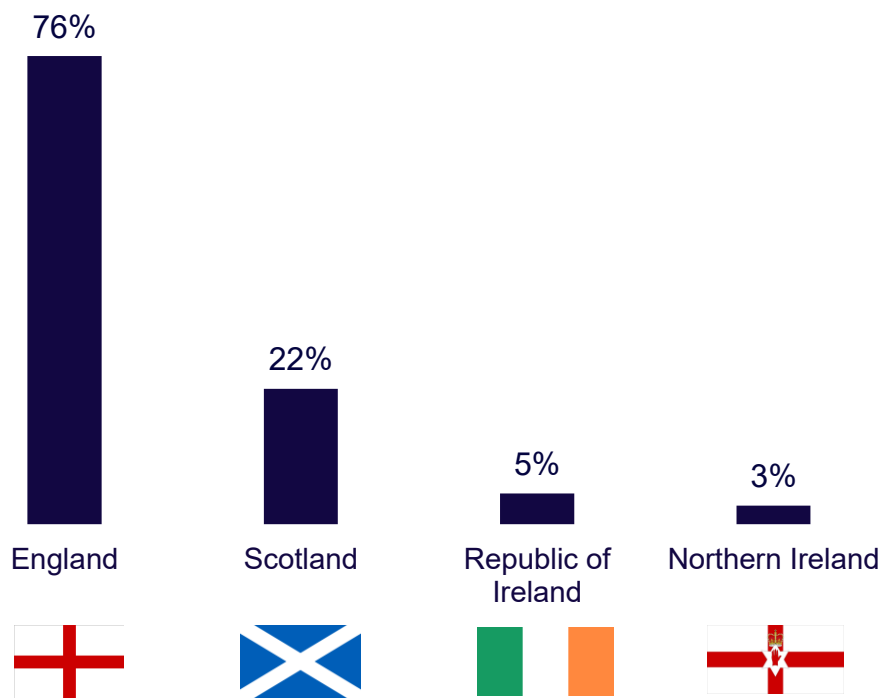
B1. You mentioned that you did not take a short break or holiday in Wales during 2023. Were you considering an overnight trip to/within Wales in 2023 at any stage?

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=2322.

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

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

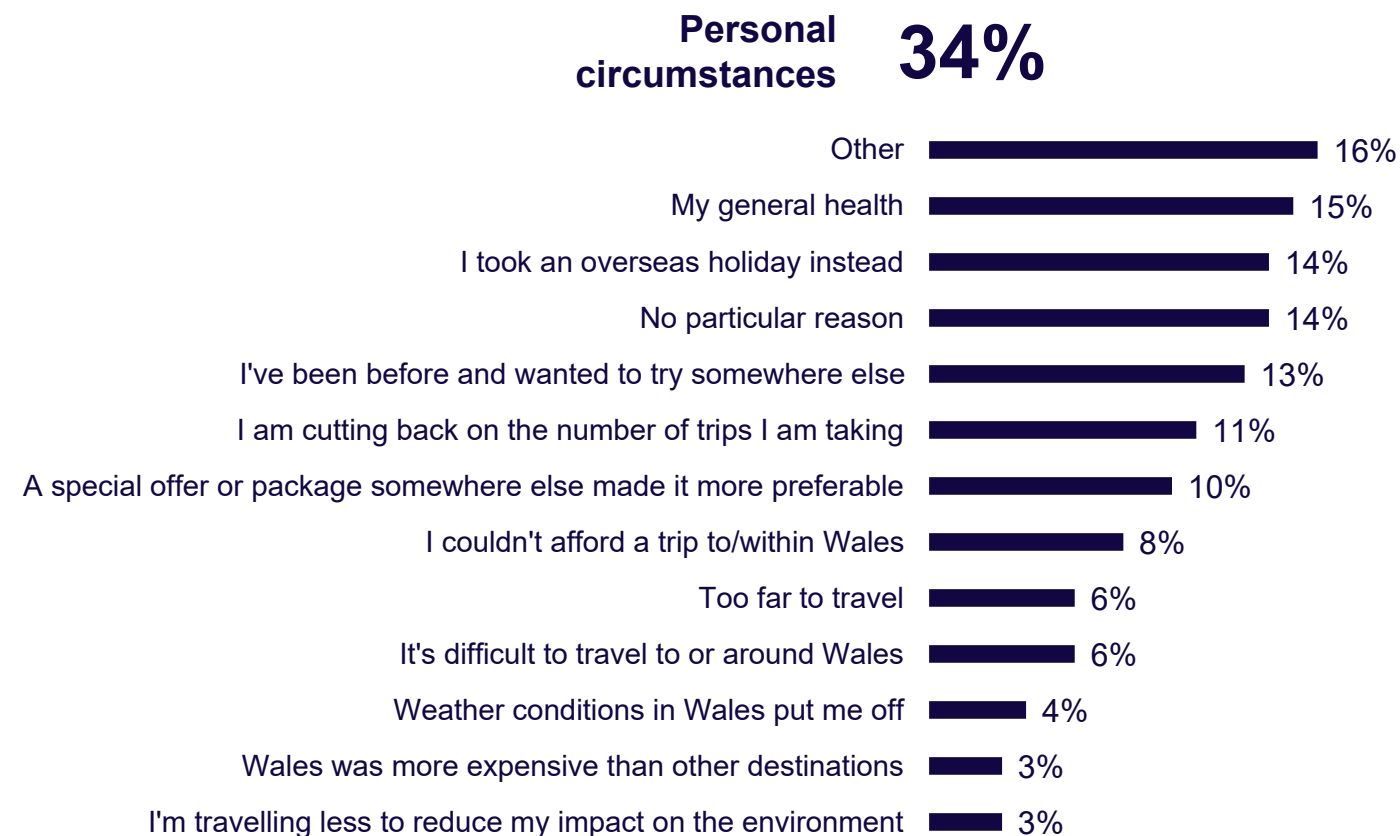


B3. And in which of the following areas of the British Isles and Ireland did you go? Non-visitors to Wales that went elsewhere in the British Isles, n=1093.



In 2023, 'Personal circumstances' were the most cited reason for not visiting Wales. The open text responses mention a large number of topics. 2% of responses mentioned the 20mph speed limits.

Reasons for not visiting Wales in 2023



B4. What are the reasons that you didn't visit Wales for a holiday in 2023? Non-Wales trip takers 2023, n=2322. Charted high to low.





Reasons for not taking a trip

Non-Conversion

A noteworthy number (44%) of non-visitors did consider Wales.

Drivers of non-visitation

'Personal circumstances' were frequently cited as the reason for not visiting Wales.

