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Welsh Government

RESEARCH, DOCUMENT

UK Tourism Consumer Tracker Survey Wales profile report: summer 2024 (summary)

Consumer sentiment tracking survey aiming to understand confidence, intent and barriers to take overnight short breaks and holidays in the UK and Wales.

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The domestic travel landscape

The domestic travel landscape for 2024 appears relatively flat compared to 2023. The proportion of UK residents that have taken a trip so far this year (between January and May) is almost identical to the proportion that did so last year, and intention for the summer (July to September) is also the same as in 2023.

Despite this consistency, there are some signs consumers may be cutting back. The proportion of domestic trip intenders that have 'already booked' their summer 2024 trip is significantly lower than the proportion that had done so in the same period in 2023 (35% compared to 41%), and planned trip lengths are shorter than in 2023. These findings suggest that actual summer trips may be lower than last year, and when they are taken, are shorter in length. Other likely moderations include a move towards 'cheaper accommodation', a desire for more 'free things to do' and less spending on eating out.

The cost-of-living crisis is almost certainly impacting this behaviour. Nearly 7 in 10 of the population consider themselves either 'hit hard' or 'being cautious and careful' as a result of the crisis, and over half of trip intenders explicitly agree that it is influencing their overnight domestic trips.

Wales travel intenders

Wales intenders appear to be particularly vulnerable to squeezed finances. 62% state that the cost of living is likely to influence their domestic trips, compared to 56% across the UK. On the trip, Wales intenders are more likely to look for more 'free things to do'.

The appeal of overseas travel may also be dampening domestic intentions. As

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domestic travel remains flat, the proportion that have taken an overseas trip this year and who plan on taking an overseas trip this summer, have both increased compared to 2023.

Profile of intenders

Consistent with intentions across the UK, Wales summer 2024 intenders are most likely to be motivated to take a trip so they can spend 'family time or time with my partner' and 'to get away from it all and have a rest'. Beyond these reasons, the appeal of Wales' countryside is especially strong - 'to connect with nature/be outdoors' is the third most important motivation, while 'walking, hiking or rambling' is the leading planned activity on a Wales trip.

The survey also provides insights on intentions around activities, accommodation type, destination and trip length.

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