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UK Tourism Consumer Tracker Survey: Wales profile report 2024: Summer 2024 (April to June fieldwork)

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Mae’r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Introduction

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VisitEngland, VisitScotland and Visit Wales (Welsh Government) have commissioned a consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

The survey addresses: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.

The tracker is based on a UK nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales residents to deliver robust weekly samples. The survey has been run since 18th May 2020

The findings in this report are based on data from April to June 2024. This is based on fieldwork taking place during the following dates:

- **April wave: 2nd to 9th April**
- **May wave: 1st to 8th May**
- **June wave: 3rd to 7th June**

Where relevant, results are compared to earlier research conducted in the equivalent period.

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Definitions used within this report (1)

In this report we look at the profiles and attitudes of a number of separate audiences:

Definitions used include:

- **January to May trip-takers**: Member of the public who have taken a UK holiday or short break between January and May 2024
- **Summer intenders**: Members of the public who state their *next* UK holiday or short break will be between July and September 2024.

The table below summarises the sample sizes of the key audiences featured in this report. Due to low sample sizes, Wales intender data has not been compared to 2023. However, where there are clear differences these have been noted in the commentary.

Audience	Sample size
UK residents	1,755
UK January to May trip-takers	1,153
Wales January to May trip-takers	116
UK summer intenders	2,162
Wales summer intenders	192

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Definitions used within this report (2)

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:

- **Younger independents:** 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+.

Please note that trip-takers do not always travel within their life stage – for example, ‘families’ may travel without their children. However, life stage composition is a reliable driver of their behaviour.

For ease of analysis the following accommodation definitions are used:

- **Serviced accommodation:** Hotel, B&B, farmhouse or serviced apartment
- **Commercial self-catering:** Rental holiday flat/apartment or Rented holiday home or in someone else’s private home on a commercial basis
- **Private home:** Second home/time share or Friends/relative’s home
- **Caravan/Camping/Glamping:** Touring caravan or Campervan/Motorhome or Static Caravan or Tent or Glamping/Alternative
- **Other accommodation:** Hostel or other type of accommodation

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Key findings

Key findings (1)

The domestic travel landscape

1. The domestic travel landscape for 2024 appears relatively flat relative 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.
2. Despite this consistency however, there are some signs that the public may be cutting (or holding) 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.
3. 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. Underlining this sentiment, almost half of non-trip-takers in the last 12 months point to financial reasons in explaining why they have not taken a trip.
4. 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. Further, of all the UK destinations, Wales is the most likely to attract a holiday-maker that has been ‘hit hard’ by the cost-of-living crisis, and the 2nd *least* likely to attract a trip-taker that is ‘better off’ or ‘unaffected and confident’. Wales summer intenders are also one of the least likely to have already booked their trip – at 27%, significantly behind the South West of England (39%). On the trip, Wales intenders are more likely to look for more ‘free things to do’.
5. The appeal of overseas travel may also be dampening domestic intentions. As 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. The rise in overseas travel is in part being driven by retirees, who are significantly more likely to taking a trip abroad than a year earlier.

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Key findings (2)

Wales trip intentions

1. Consistent with intentions across the UK, Wales summer 2024 intenders are most likely to be motivated to take a Wales overnight 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. Other prominent anticipated nature-related activities include 'exploring scenic areas by car' and 'nature and wildlife experiences'.
2. A proportion of Wales trip intenders seek an 'active' experience on their Wales trip. 'For adventure or a challenge' is the 5th leading motivation (19% stating this), and 'for an active holiday' is 7th (at 12%). 'Adventure activities' (18%), 'water sports' (12%) and 'cycling or mountain biking' (8%) each feature amongst a notable minority of trip-intenders.
3. Wales intenders are also attracted by Wales' heritage and culture offer – 36% planning to 'visit heritage sites' and 20% to 'visit cultural attractions'.
4. Wales trip intenders are most likely to anticipate their overnight trip being in a 'traditional seaside town' or a 'countryside or village' although this does vary by month – the former most popular in September, and the latter in July and August. 'Rural coastline' and 'mountains or hills' are also popular, again with variation by month – 'rural coastline' preferred in September, 'mountains or hills' in August.
5. Consistent with previous reporting, Snowdonia is the number one intended destination, with other North Wales destinations such as Llandudno and Colwyn Bay also featuring strongly. Despite relatively low intentions to visit a 'large city', Cardiff is the second most preferred planned Wales destination – and the most preferred in August.
6. Around half of Wales intenders are anticipating their Wales summer trip to be a short break, more than the proportion that expect it to be a longer trip of 4+ nights. Trips are more likely to be shorter than in 2023, implying that people are cutting back on their trip spending.
7. Amongst Wales intenders, a 'partner' is the most common accompanying party member for a trip (at 63% higher than across the UK), followed by 'child, grandchild or young adults with parents' (at 38% and rising to 57% in August). A notable minority of Wales intenders are also likely to travel with 'friends' (16%) and 'pets' (9%).
8. 'Serviced' accommodation' is the most likely accommodation type for a Wales trip this summer, followed by 'caravan/camping' and 'commercial property rental'. 'Caravan/camping' is particularly prevalent in August (at 42%) and amongst families (at 47%).
9. Unsurprisingly given the dominance of rural destinations, Wales intenders are most likely to travel to their destination using their own car – at 70%, higher than amongst UK intenders (54%). Train is the second most common mode of travel (at 17%).

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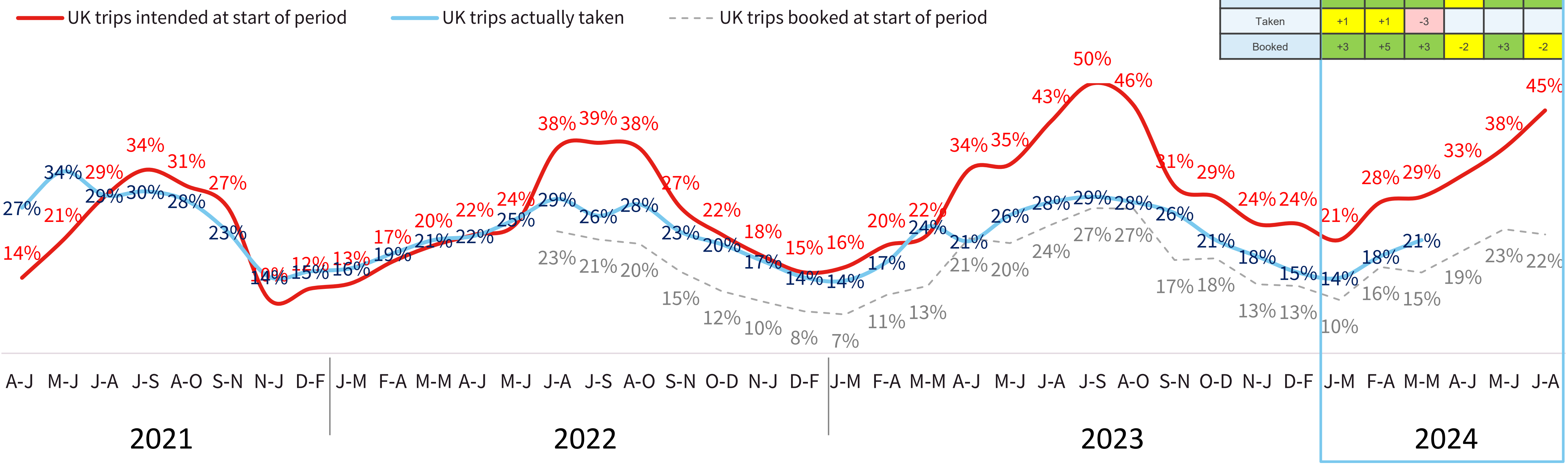
Domestic trips taken from January to May 2024

Three month domestic trip intentions, bookings and trips taken

- Rolling domestic trip intention has consistently increased since 2021. Intentions for the majority of 3 month periods in 2024 are higher than the equivalent period in 2023, as are actual trip bookings at the start of each period. However, despite these growing intentions, and carrying on a trend we witnessed in 2023, *actual trips taken* in 2024 are broadly consistent with trips taken a year earlier. This means that we are continuing to see a growing 'intention gap' with regards to domestic intentions.

Figure 1. Overnight UK trips planned/booked/taken in 3 month periods, Percentage wave-on-wave, UK

	Comparison to same period in 2023					
Intended	+5	+8	+7	-1	+3	+2
Taken	+1	+1	-3			
Booked	+3	+5	+3	-2	+3	-2



QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months? VB2enew: Which of the following best describe how close you are to booking your next overnight UK trip in? Base: All respondents: n=c.1,750 each wave

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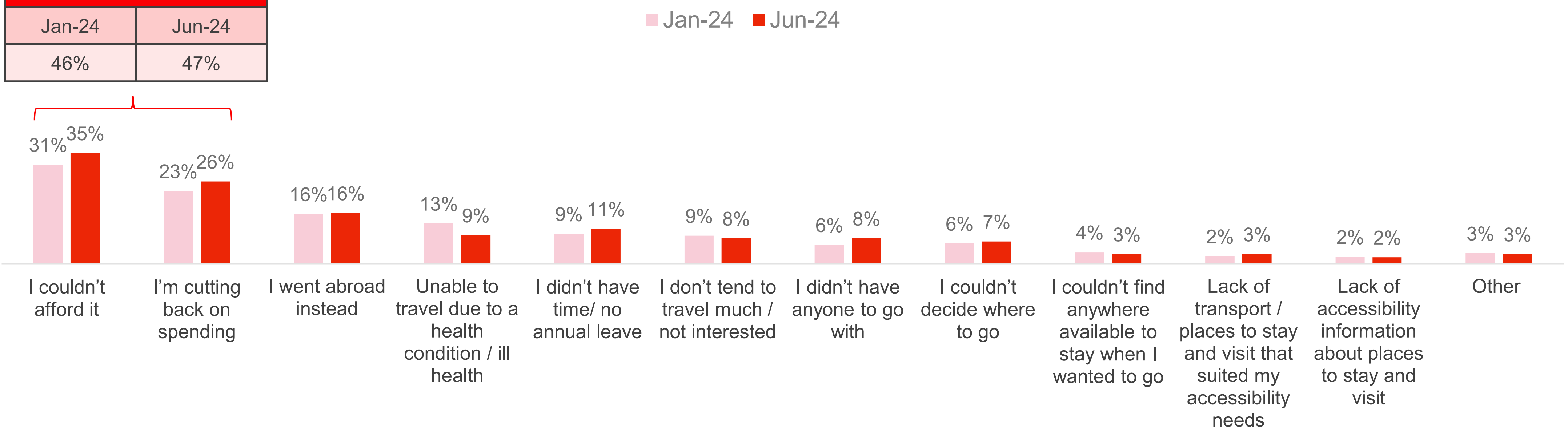
Reasons for not taking a domestic overnight trip in last 12 months

- Of those that have not taken a domestic overnight trip in the last 12 months, ‘I couldn’t afford it’ (35%) and ‘I’m cutting back on spending’ (26%) were the main reasons for not doing so, both having increased since this was last reported in January this year. Together financial reasons are mentioned as a reason for not taking a trip amongst nearly half of non trip-takers. The lure of international travel also appears strong, with 1 in 6 stating ‘I went abroad instead’.

Figure 2. Reasons for not taking a UK overnight trip in the last <u>12 months</u>, Percentage, January and June fieldwork, UK residents

Net: Financial reasons	
Jan-24	Jun-24
46%	47%



VB13b. Why have you not taken an overnight short break or holiday in the UK in the last 12 months?
Base: Jan n=604; Jun n=610

UK overnight trips taken between January and May

- Nearly 3 in 10 (28%) of the UK public took an overnight short break or holiday in the UK between January and May this year, an almost identical proportion that did so in the same period in 2023. Unsurprisingly, trip-taking was higher between March and May compared to January and February.
- The proportion of the UK public that took an overseas trip between January and May was higher than in the equivalent period in 2023, further suggesting that international travel may be impacting domestic trip-taking.

Figure 3. Proportion taken an overnight UK trip, Percentage, June fieldwork, UK

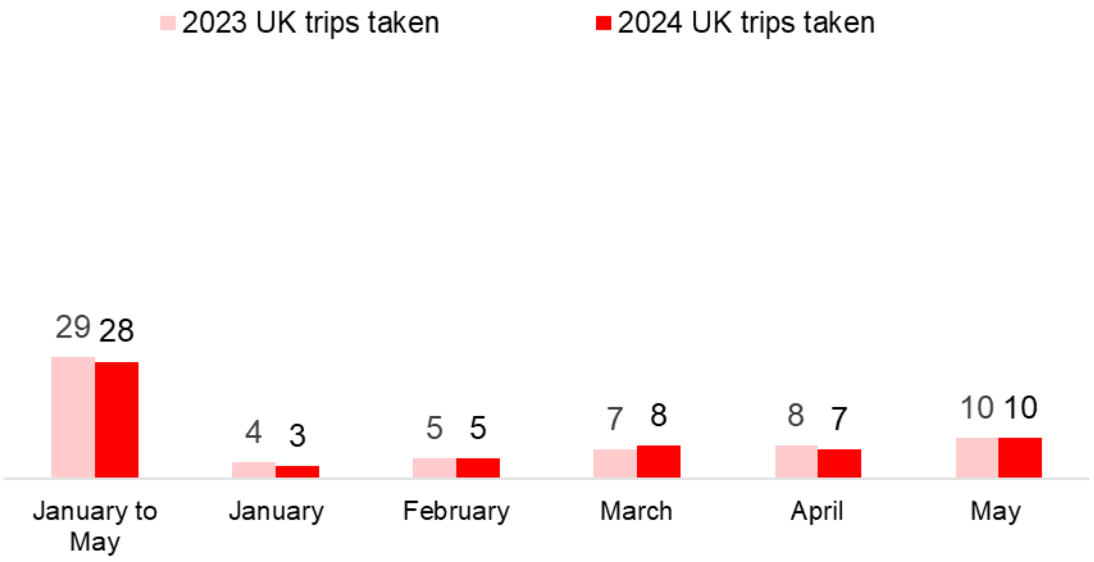
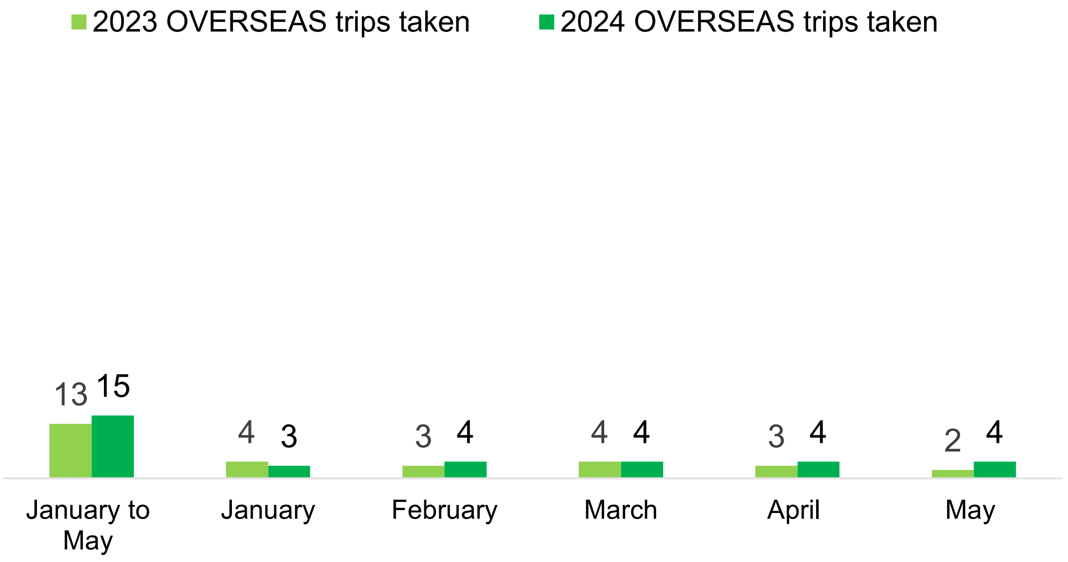


Figure 4. Proportion taken an overnight OVERSEAS trip, Percentage, June fieldwork, UK

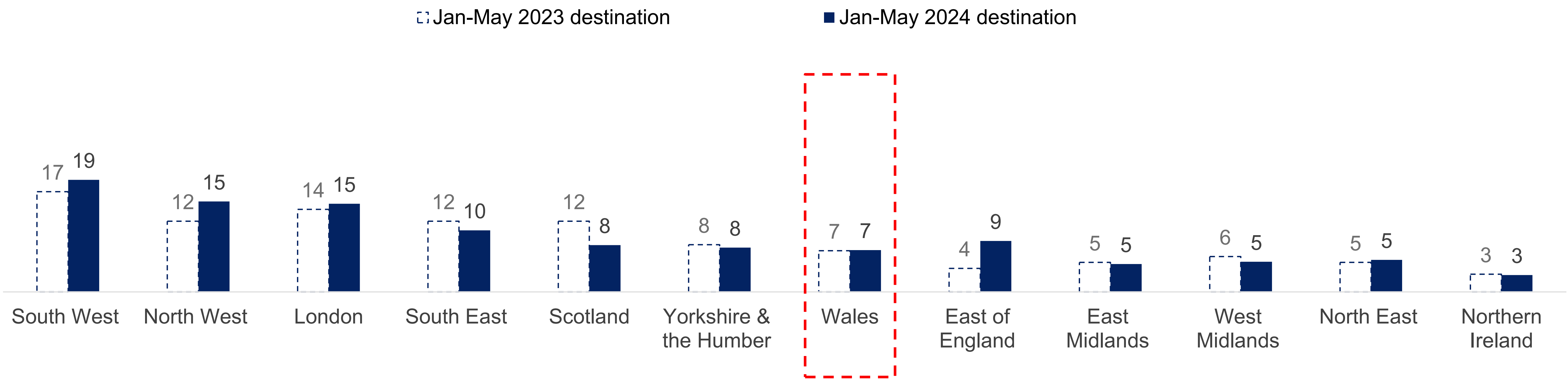


VB13A2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All UK respondents. n=1,755

Where stayed on January to May overnight domestic trip

- As in 2023, the South West of England was the most visited UK destination for a domestic overnight trip between January and May. 7% of trip-takers stayed in Wales during that period - also consistent with 2023, and with minimal variation by month.

Figure 5. Where stayed on UK overnight trip between January and May, Percentage, April to June fieldwork, Proportion of UK Intenders



VB13C. Where in the UK did you stay on your most recent trip in [pipe: hVB13c]?
Base: All trip-takers between January and May. 2023 n=553; 2024 intenders n=489

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Life stage and financial status of Wales January to May trip-takers

- Just over a third (35%) of Wales trip-takers between January and May fell into the family life stage, relatively consistent with 2023, and higher than the overall UK average.
- Wales trip-takers in 2024 appear to have been more negatively impacted by the cost-of-living crisis than trip-takers in 2023, and than UK trip-takers within the same period. This aligns with a broader narrative that Wales trip-takers are likely to be more cost-sensitive than those staying elsewhere in the UK.

Figure 6. Breakdown of population and trip-takers by life stage, Percentage, April to June fieldwork, UK

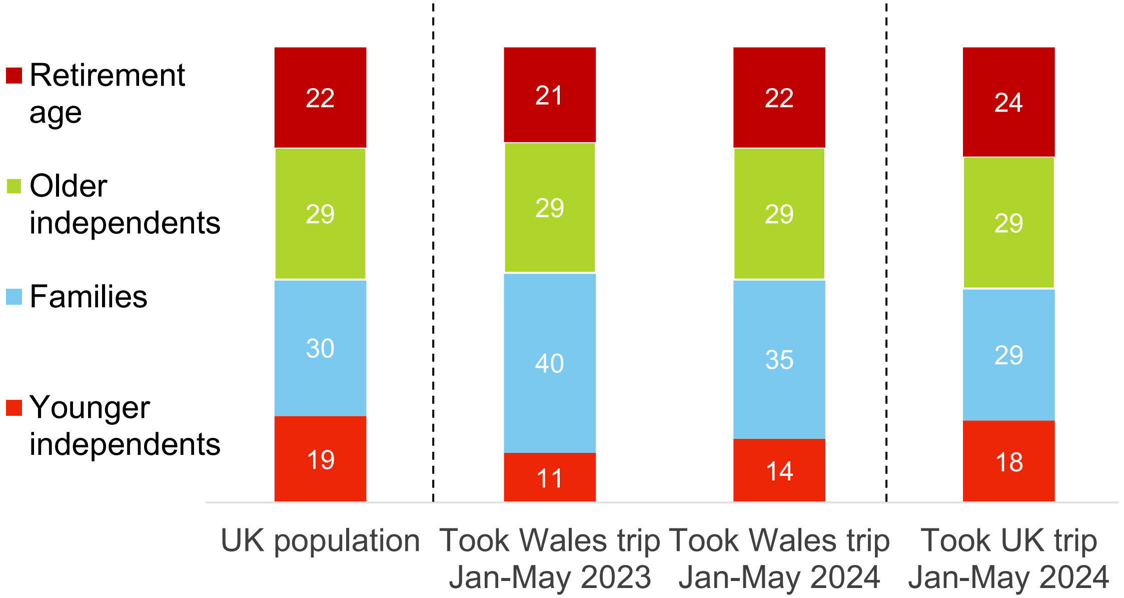
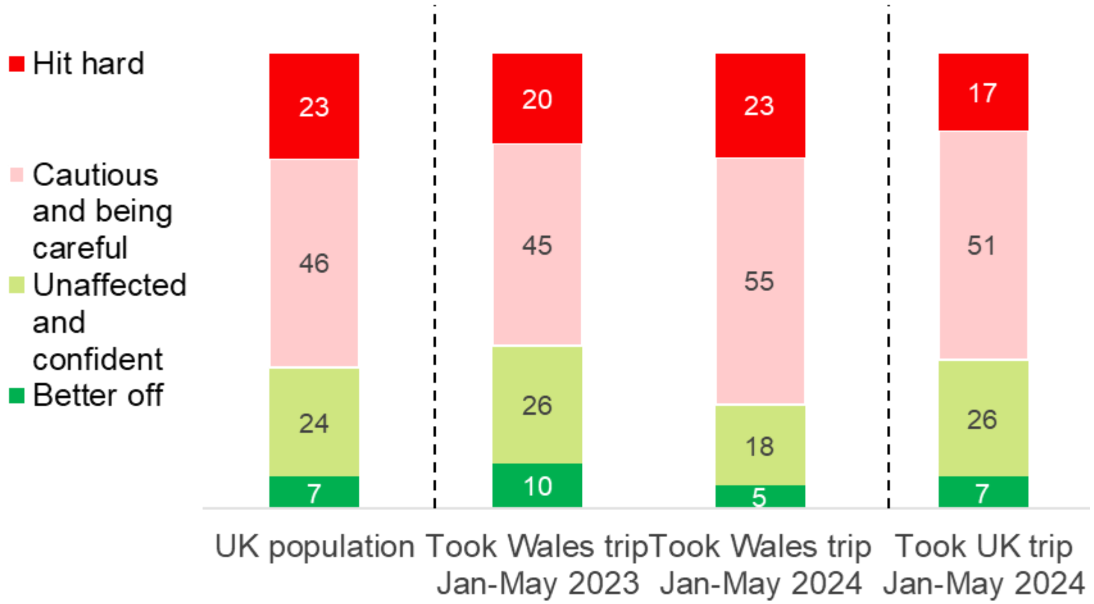


Figure 7. Impact of cost-of-living crisis amongst trip-takers, Percentage, April to June fieldwork, UK



Source: Demographics.
Base: UK population n=5,271; Took Wales trip Jan to May 2023 n= 116; Took Wales trip Jan to May 2024 n= 115; Took UK trip Jan to May 2024 n= 1,153. *Note due to low base sizes, comparisons between 2023 and 2024 are indicative only

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Domestic and overseas travel intentions – summer 2024

Upcoming UK and overseas overnight trip intentions

- Looking ahead, over half (55%) of the UK public plan on taking a domestic short break or holiday this summer (July to September), an almost identical proportion to last year. Trip intention is highest in August and September – both at around 1 in 4 of the population.
- 3 in 10 of the population plan on taking an overseas break in that period – intention significantly higher than in 2023.

Figure 8. Proportion anticipating going on any overnight UK trips, Percentage, June fieldwork, UK

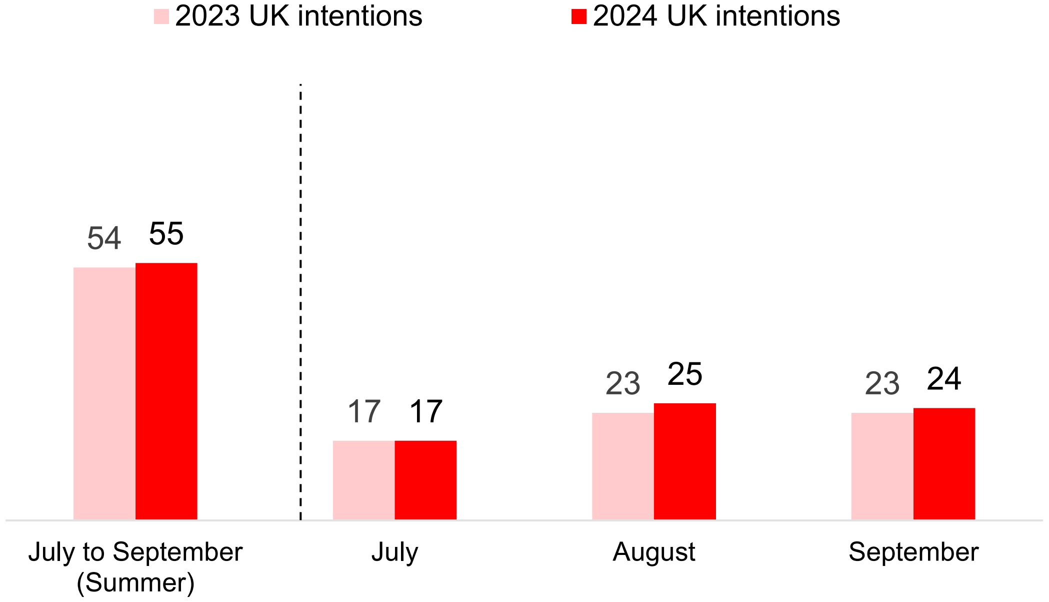
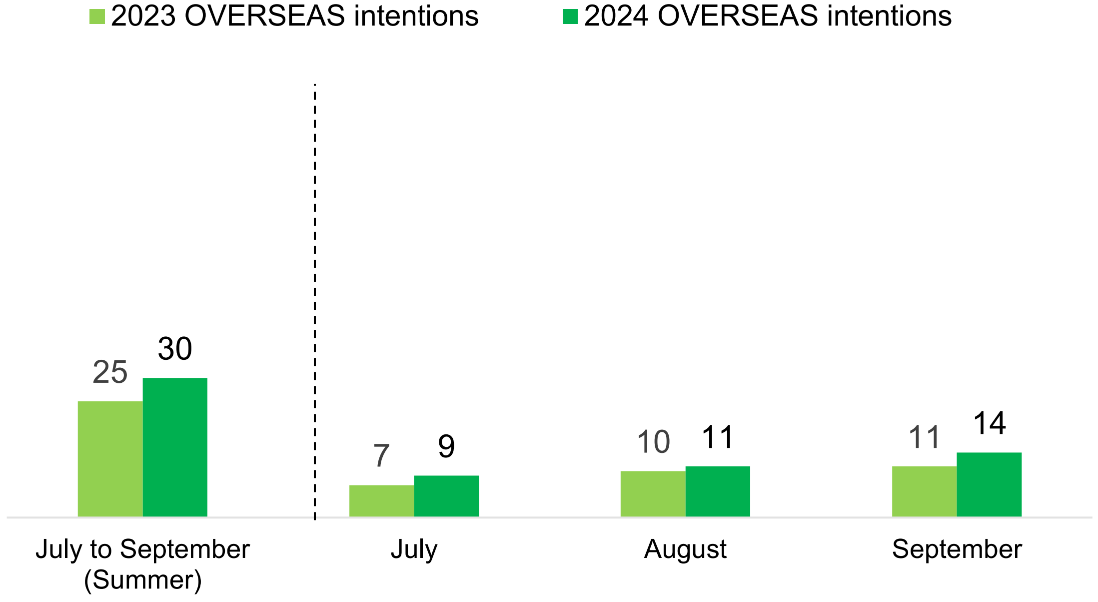


Figure 9. Proportion anticipating going on any overnight OVERSEAS trips, Percentage, June fieldwork, UK



VB2a/cc. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB2b/d. And when else do you anticipate going on a UK/overseas holiday or short break?
Base: All UK respondents. n=1,755

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Trip-booking status of planned UK and overseas trips

- As of June 2024, only a minority (35%) of UK summer trip intenders have *already* booked their summer trips. Most notably, the proportion that have booked their trips is lower than the equivalent period in 2023, suggesting that not only is there likely to be a continuation of the intention gap this year, but it may be even larger.
- Also, notably, intended overseas summer trips are significantly more likely to have been 'already booked' than domestic overnight trips in the same period, suggesting that given the choice between the two, domestic trips are more likely to be sacrificed.

Figure 10. Overnight UK trip booking status, Percentage, January fieldwork, UK

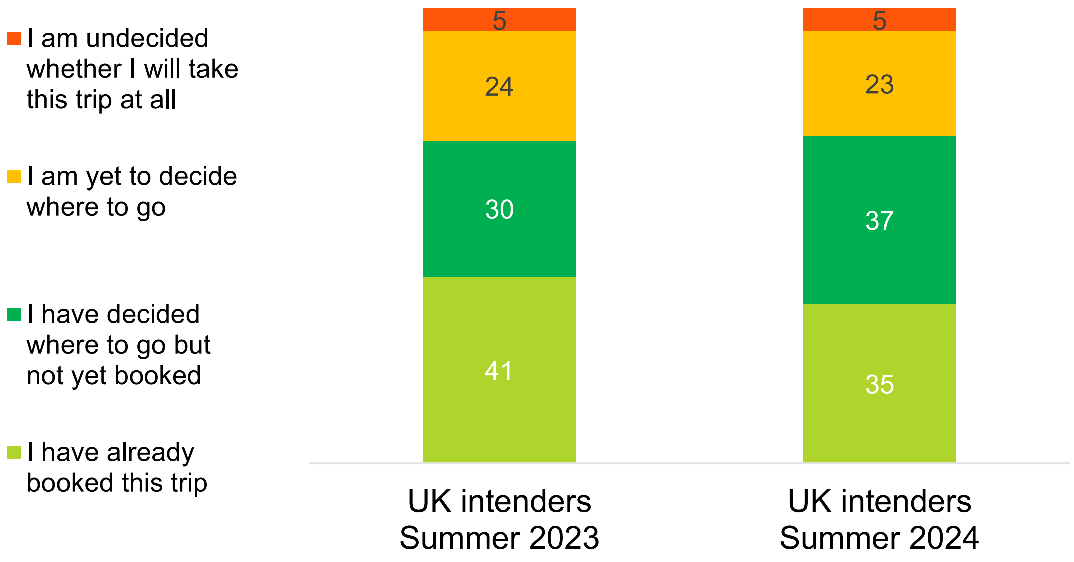
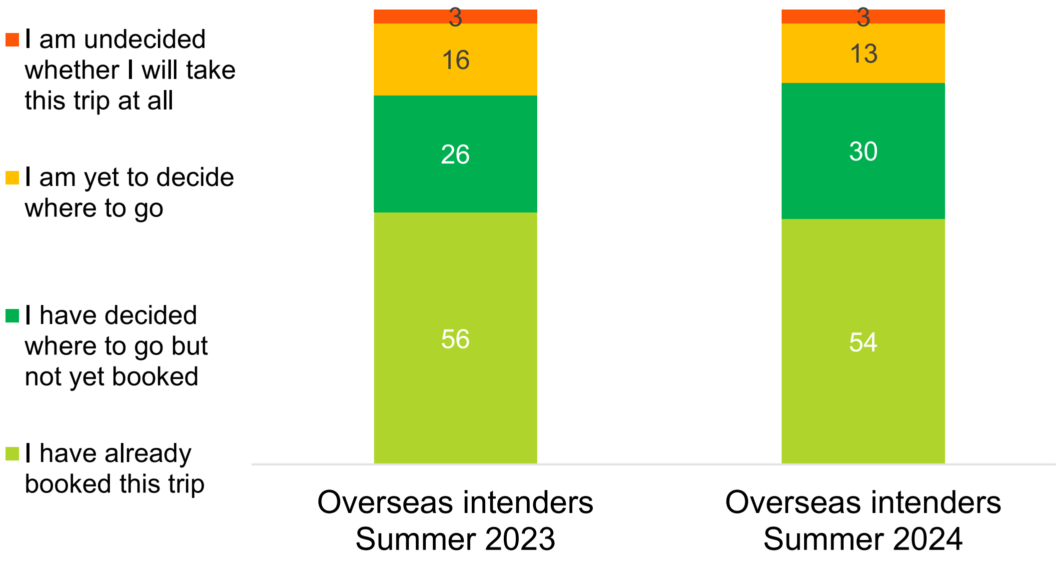


Figure 11. Overnight OVERSEAS trip booking status, Percentage, January fieldwork, UK



VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>? UK intenders summer 2023 n=946; UK intenders summer 2024 n=854; Overseas intenders summer 2023 n=496; Overseas intenders summer 2024 n=466

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Demographics of UK and overseas trip intenders

- The life stage profile of UK 2024 summer intenders is virtually identical to profiles in 2023, with the exception of a slight increase in retirees. The increase in retirees is even more apparent amongst overseas intenders, underlining that they are driving the overall growth in plans to travel abroad.
- Life stage profiles differ by month of planned UK trip. Unsurprisingly, families dominate in August (at 47%), whilst older independents and retirees make up the largest life stages in September (32% and 27% respectively).

Figure 12. Breakdown of population and UK intenders by life stage, Percentage, April to June fieldwork, UK

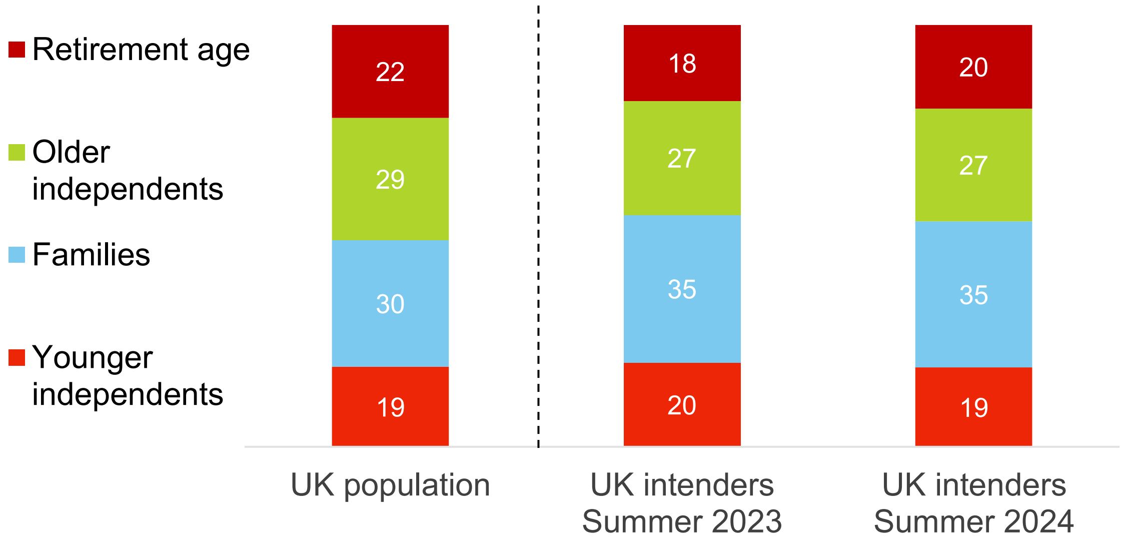
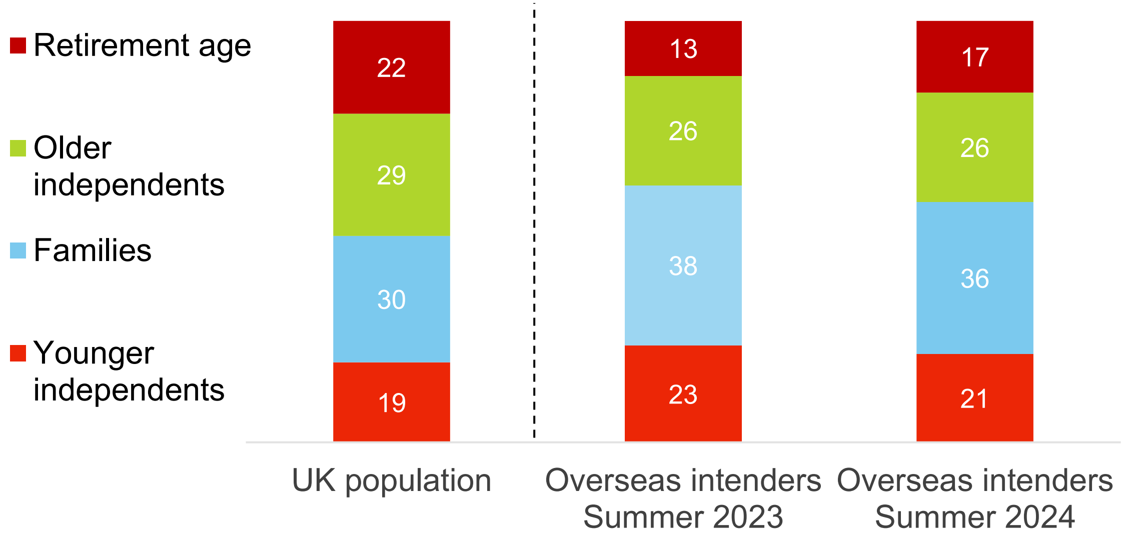


Figure 13. Breakdown of population and OVERSEAS intenders by life stage, Percentage, April to June fieldwork, UK



Source: Demographic questions.
Base: All respondents. UK population n=5,271; UK intenders summer 2023 n=2,402; UK intenders summer 2024 n=2,848; Overseas intenders summer 2023 n=1,489; Overseas intenders summer 2024 n=1,688

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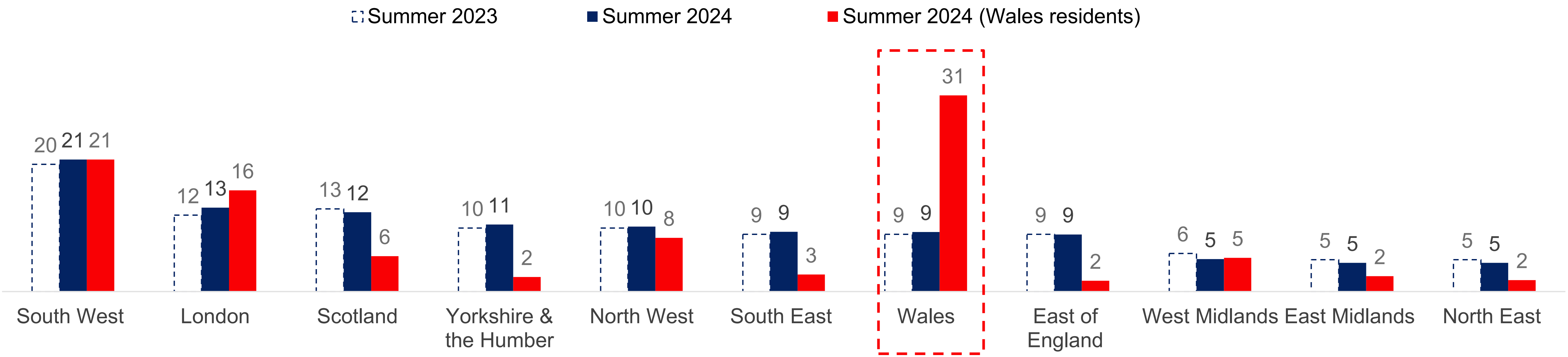
Where planning on staying on next UK trip

- The South West of England is the most preferred destination for a summer trip, preference consistent with 2023. Nearly 1 in 10 of UK trip intenders are planning an overnight trip in Wales – identical with the proportion that planned this in 2023, and with very little variation across the summer months.
- Nearly a third of Wales resident intenders plan to take an overnight trip in Wales (also identical to 2023). Notably, the South West of England is the next most preferred area of the UK for Wales residents.

Figure 14. Where planning on staying on next UK overnight trip from July to September 2024, Percentage, April to June fieldwork, Proportion of UK Intenders



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break between summer 2023 intenders n=2,145; summer 2024 intenders n=1,976

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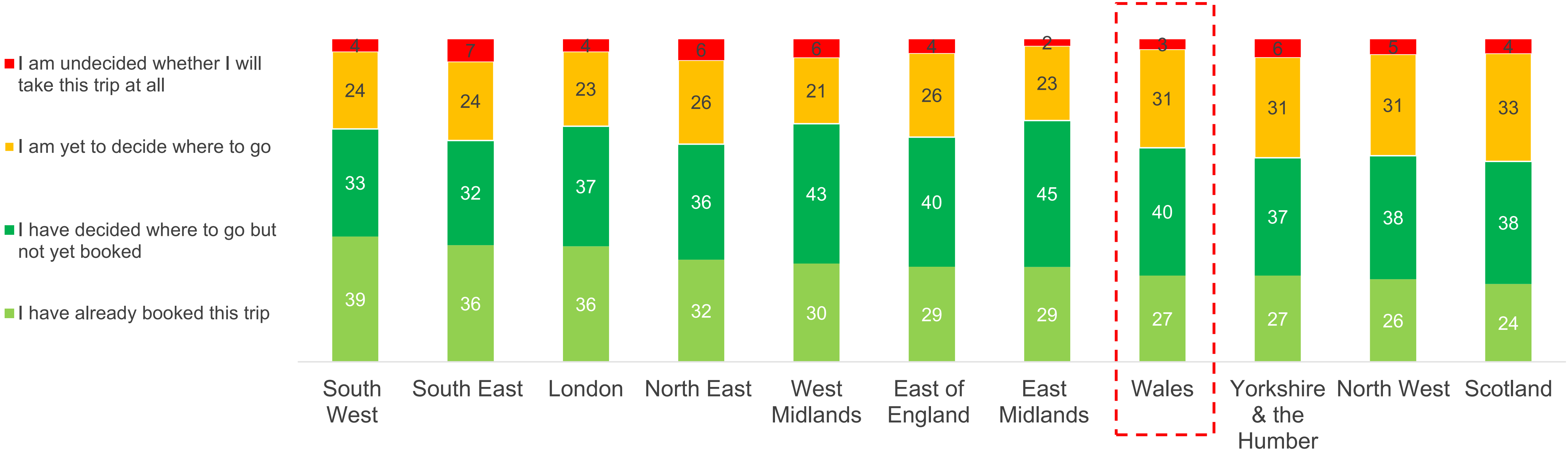
Trip-booking status of planned UK trip by destination

- Only 27% of Wales summer intenders have already booked their trip – lower than the majority of other UK destinations, in particular the South West of England (at 39%). This suggests that the 'intention gap' for Wales may be larger than the overall gap across the UK.
- Positively, a further 2 in 5 (40%) have decided to go to Wales despite not yet having booked, but a third are undecided on the destination of whether they will take the trip at all.

Figure 15. Overnight UK trip booking status for summer trip by destination, Percentage, April to June fieldwork, UK



VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>? Base: UK intenders summer 2024. London n=307; West Mids n=115; NW Eng n=226; East Mids n=92; SW Eng n=422; SE Eng n=186; Yorks & Humber n=214; Wales n=227; NE Eng n=97; Scotland n=307

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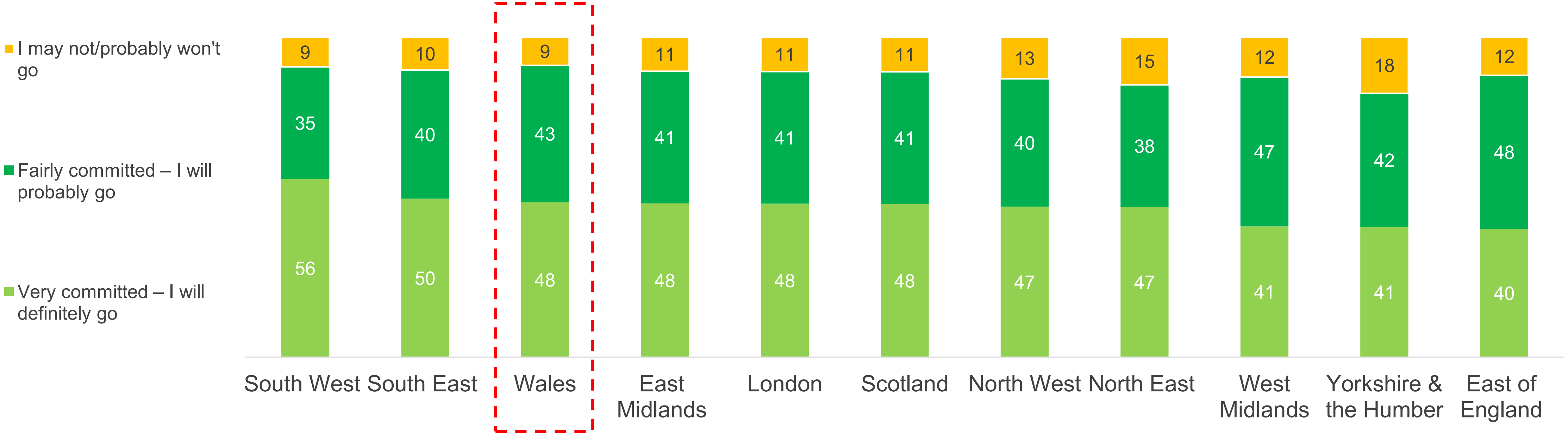
Commitment levels of planned UK summer trips by destination

- Despite low actual bookings, the commitment levels for taking a Wales trip this summer are relatively high at 48% - only the South West of England and South East of England commitment higher.

Figure 16. Overnight UK commitment levels, Percentage, April to June fieldwork, UK



VB2ei. How committed are you to taking this next trip in <INSERT MONTH FROM VB2A>? Base: UK intenders summer 2024. London n=307; West Mids n=115; NW Eng n=226; East Mids n=92; SW Eng n=422; SE Eng n=186; Yorks & Humber n=214; Wales n=227; NE Eng n=97; Scotland n=307

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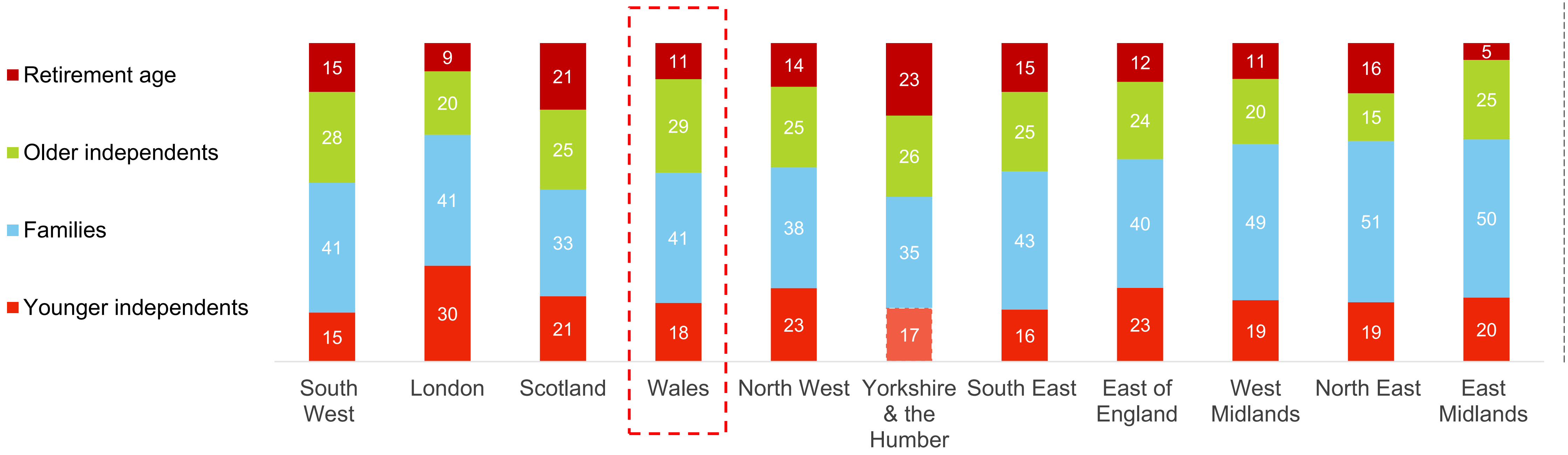
Demographics of summer intenders across destinations

- The life stage profile of Wales intenders this summer is broadly similar to other UK destinations – the family life stage the largest. However, as at a UK level, there is variation by individual month – families making up a majority in August (at 57%), but older independents and retirees more prevalent in September (37% and 23% respectively).

Figure 17. Breakdown of summer destination intenders by life stage, Percentage, April to June fieldwork, UK

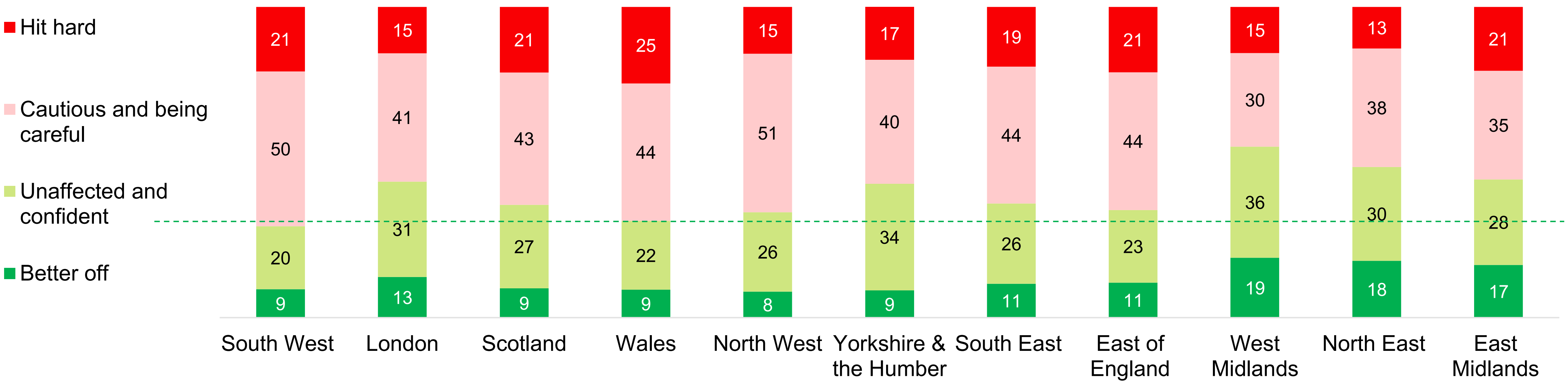


Source: Demographics.
Base: UK intenders summer 2024. London n=307; West Mids n=115; NW Eng n=226; East Mids n=92; SW Eng n=422; SE Eng n=186; Yorks & Humber n=214; Wales n=227; NE Eng n=97; Scotland n=307

Impact of cost-of-living crisis on intenders across destinations

- Wales is set to attract the highest proportions of intenders that have been 'hit hard' by the cost of living crisis and the joint 2nd lowest 'unaffected' or 'better off' (only South West of England lower). This suggests that Wales is seen as a destination suitable for a less affluent visitor.

Figure 18. Impact of the cost-of-living crisis on finances by destination amongst summer intenders, Percentage, April to June fieldwork, UK



Q17. 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?
Base: UK intenders summer 2024. London n=307; West Mids n=115; NW Eng n=226; East Mids n=92; SW Eng n=422; SE Eng n=186; Yorks & Humber n=214; Wales n=227; NE Eng n=97; Scotland n=307

Cost of living impact on UK overnight trips

- 3 in 5 (62%) of Wales summer intenders state that the cost-of-living crisis is likely to influence their UK short breaks or holidays in the next six months. Aligned with data on the previous page, the impact on Wales intenders is higher than summer intenders from across the UK. The main impacts amongst both Wales and UK summer intenders are to 'look for more free things to do', 'to choose cheaper accommodation' and 'to spend less on eating out'.

Figure 19. Cost of living impact on overnight trips, Percentage, April to June fieldwork, UK

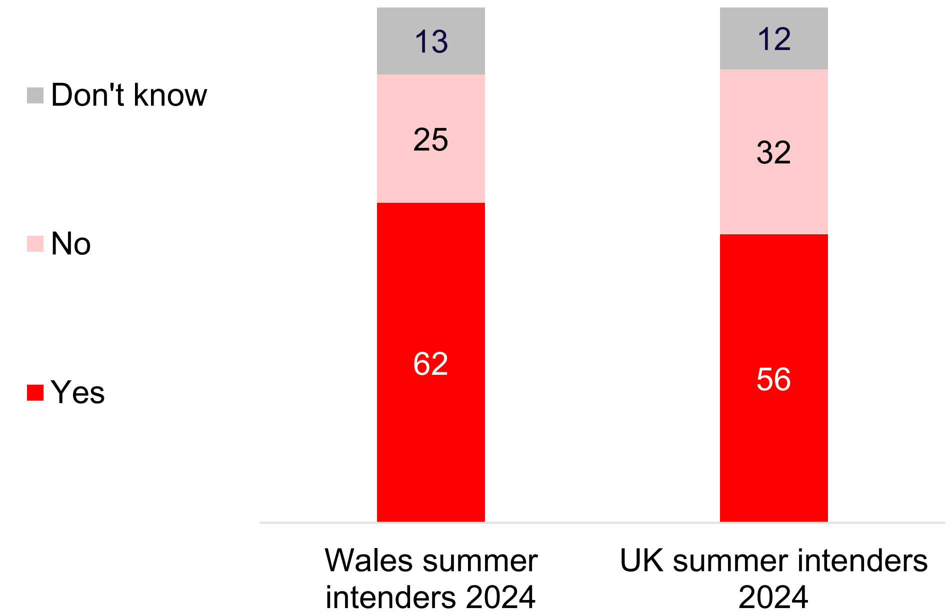
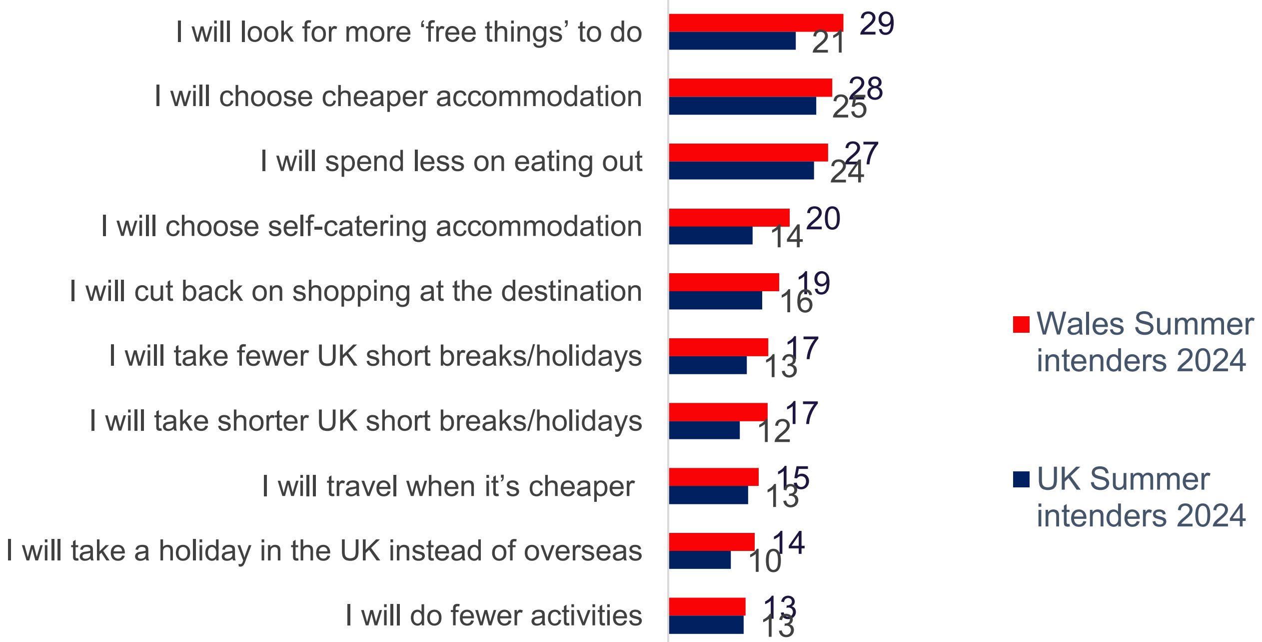


Figure 20. 'Cost of living' impact on Wales and UK holidays and short breaks, Percentage, April to June fieldwork, UK, Top 10



VB7f: Just to check, is the 'cost of living crisis' likely to influence your UK short breaks or holidays in the next six months? Base: Wales summer intenders 2024 n=227; UK summer intenders 2024 n=2,162. VB7iii. How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next six months? Base: Wales summer intenders 2024 n=139; UK summer intenders 2024 n=1.225.

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Cost of living impact on UK day trips

- Around half of Wales and UK residents anticipate the cost-of-living crisis influencing their day trips – ‘spending less on eating out’, ‘looking for more free things to do’ and ‘travelling when it’s cheaper’ the main perceived impacts.

Figure 21. Cost of living impact on day trips, Percentage, April to June fieldwork, UK

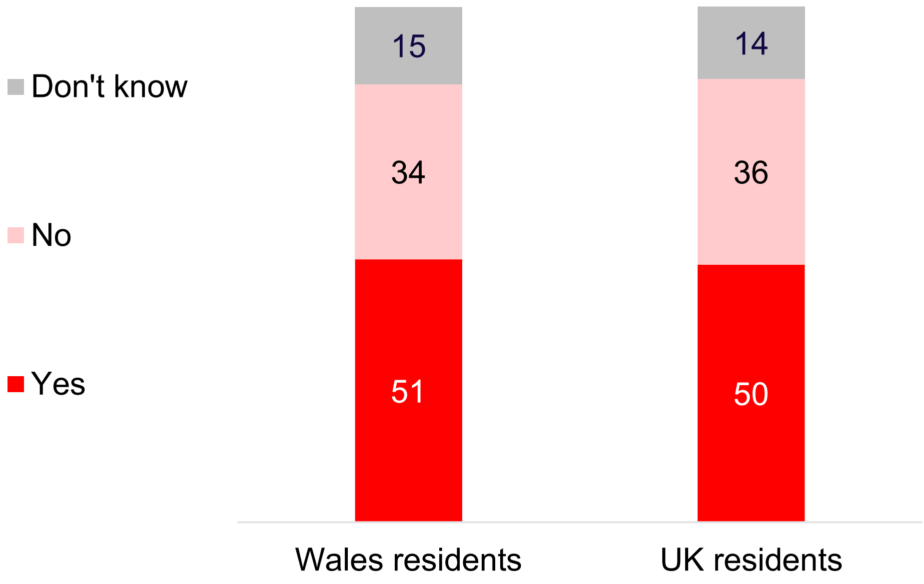
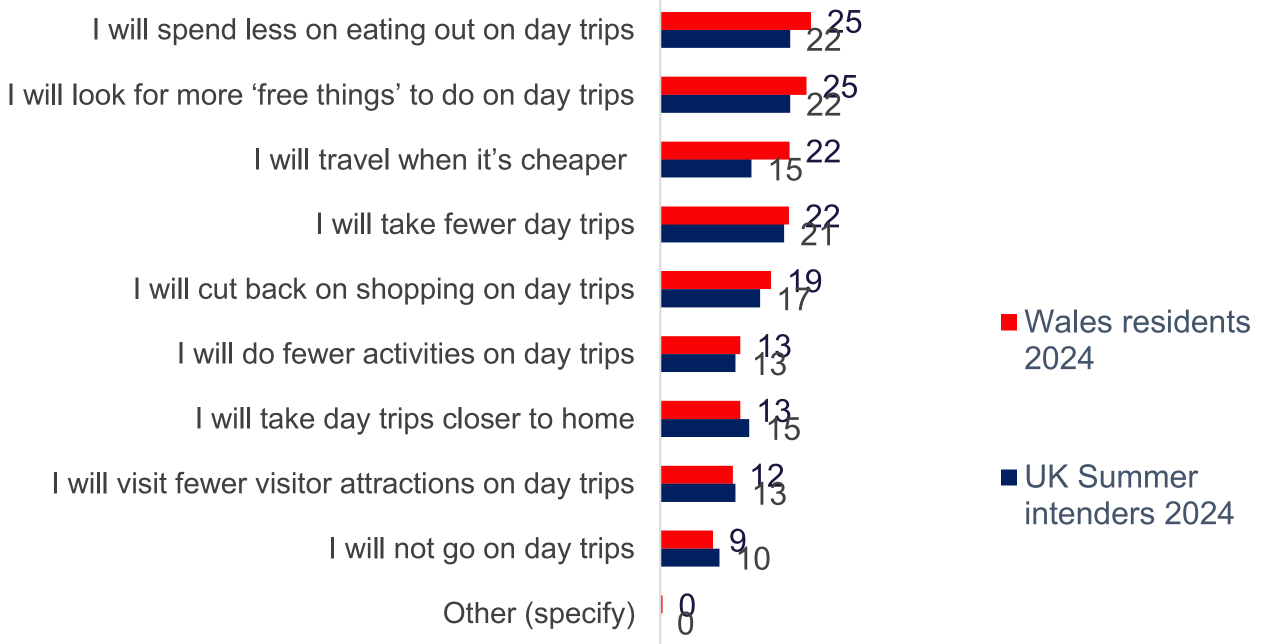


Figure 22. ‘Cost of living’ impact on Wales and UK day trips, Percentage, April to June fieldwork, UK, Top 10



VB7fi: Is the ‘cost of living crisis’ likely to influence your UK day trips in the next few months? Base: Wales residents n=611; UK residents n=5,271. VB7Cii. How, if at all, would you say the ‘cost of living crisis’ is likely to influence your day trips in the next few months? Base: Wales residents n=329; UK residents n=2,618

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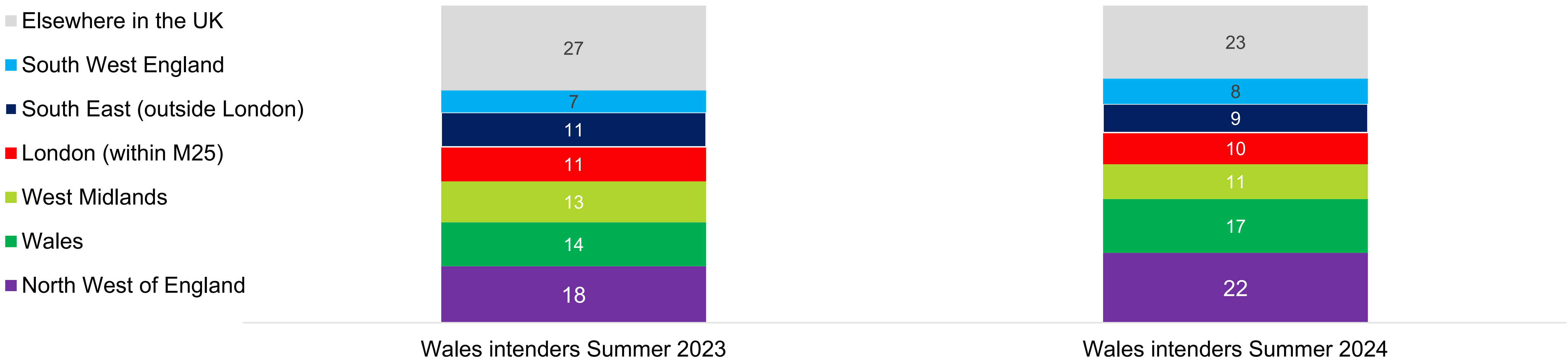
Demographics and origin of Wales intenders

- Wales summer intenders are most likely to live nearby in the North West of England, Wales and the West Midlands. The representation of trip-intenders from Wales and the North West has increased since 2023.
- Notably, intenders from regions closer to Wales (North West of England, West Midlands and Wales) are more likely to state they have been negatively impacted by the cost-of-living crisis. This suggests that their financial situation may be driving their choice of a nearby overnight trip destination.

Figure 23. Breakdown of population and intenders by region of residence, Percentage, April to June fieldwork, UK



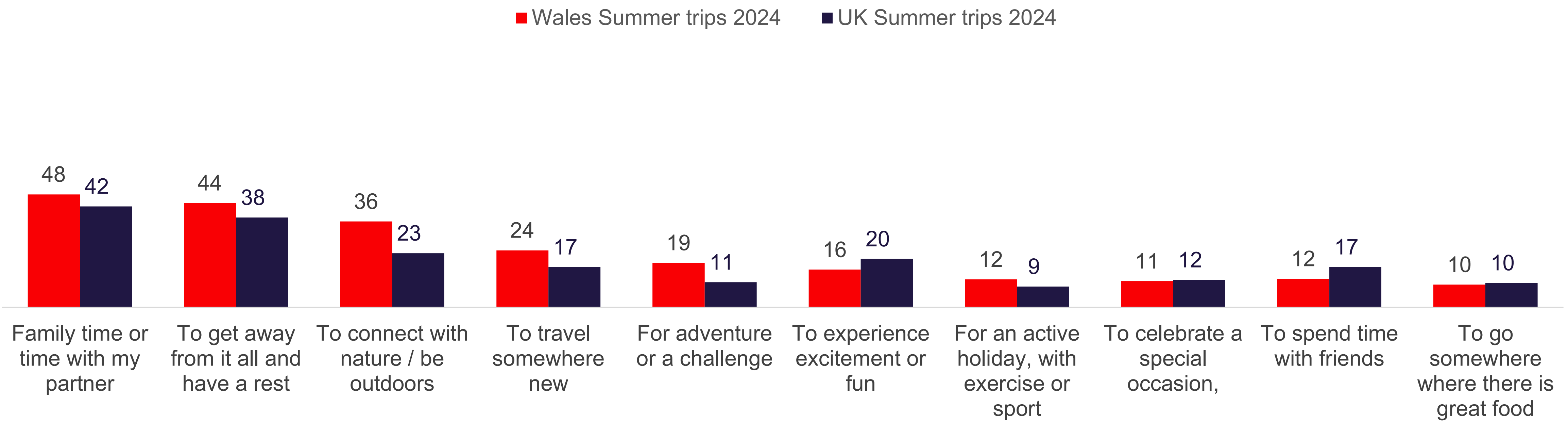
Source: Demographics. Base: Wales intenders summer 2023 n=239; Wales intenders summer 2024 n=227

Wales trip behaviour and profiles - summer 2024

Trip motivations for next UK short break or holiday – Top 10

- Wales summer 2024 intenders are most likely to be motivated to take a Wales overnight 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 motivations, they are also driven to visit by a desire ‘to connect with nature’, ‘to travel somewhere new’ and ‘for adventure or a challenge’ – each higher than across the UK.
- Driven by life stage, motivations vary by individual month – ‘to get away from it all’ and ‘connecting with nature’ strongest in September; ‘excitement or fun’ and ‘adventure or a challenge’ the strongest in August.

Figure 24. Motivations for Wales and UK holidays and short breaks in summer, Percentage, April to June fieldwork, UK, Top 10



Question: VB6fii. Which of the following best describe your motivation/s for this trip?

Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

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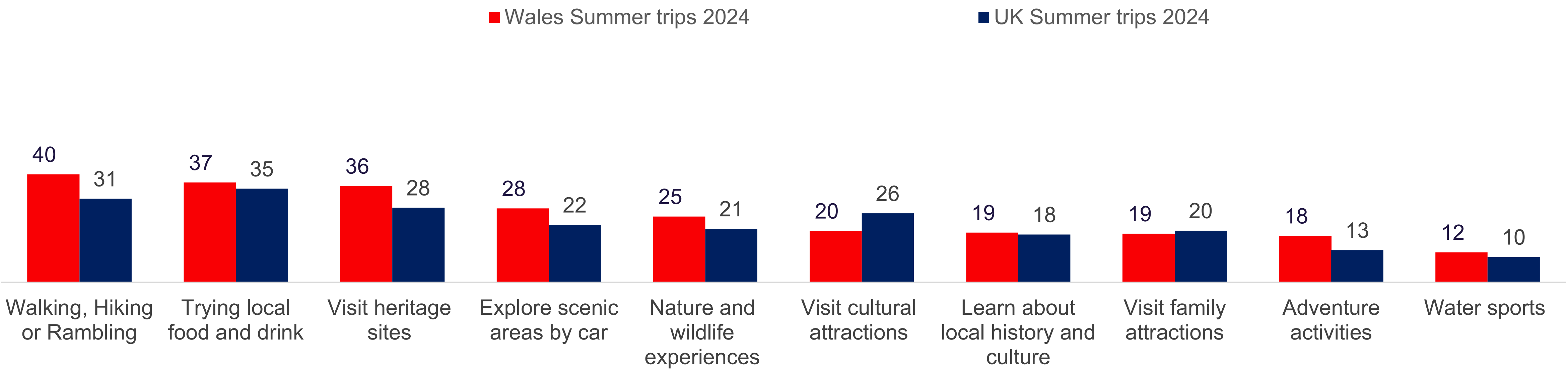
Trip activities for next UK short break or holiday – Top 10

- The most popular intended activities for Wales summer intenders are ‘walking, hiking or rambling’, ‘trying local food and drink’ and ‘visiting heritage sites’ – each higher than across the UK. ‘Exploring scenic areas by car’ and ‘nature and wildlife experiences’ also features strongly, and higher than for all UK trips.
- Wales intenders in August plan on doing a broader range of activities than intenders in other months

Figure 25. Activities on Wales and UK holidays and short breaks <u>in summer</u>, Percentage, April to June fieldwork, UK, Top 10



Question: VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <INSERT MONTH FROM VB2A>? Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

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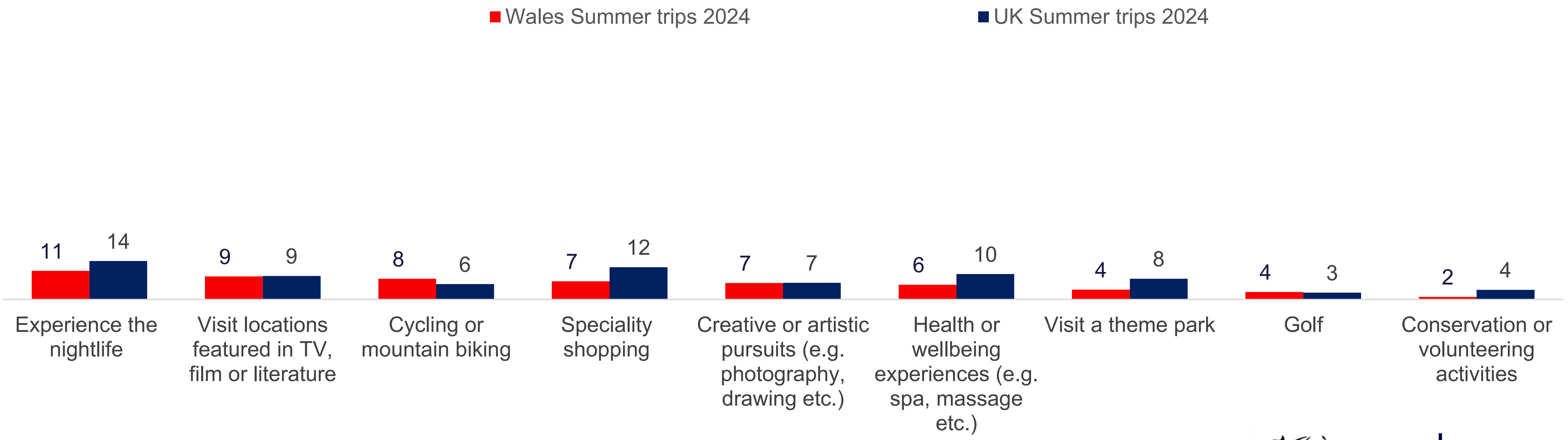
Trip activities for next UK short break or holiday - Other

- A range of more niche activities are also planned amongst Wales intenders including ‘experiencing the nightlife’, ‘visiting locations featured in TV, film or literature’ and ‘cycling or mountain biking’.

Figure 26. Activities on Wales and UK holidays and short breaks in summer, Percentage, April to June fieldwork, UK, Other



Question: VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <INSERT MONTH FROM VB2A>? Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

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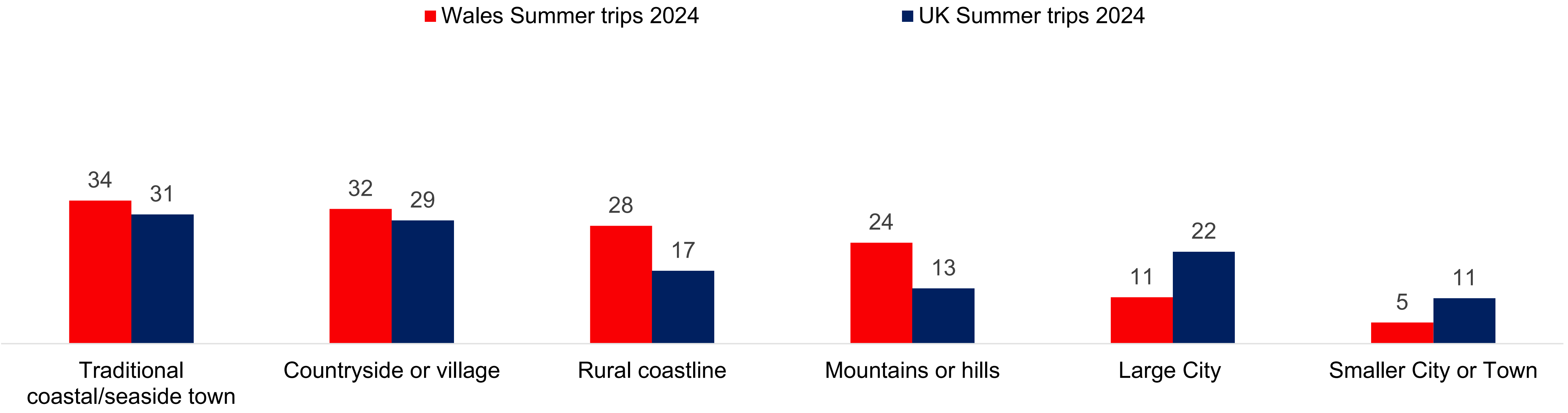
Type of destination for next summer Wales short break or holiday

- Wales trip intenders are most likely to anticipate their overnight trip being in a 'traditional seaside town' or a 'countryside or village' although this does vary by month – the former most popular in September, and the latter in July and August. 'Rural coastline' and 'mountains or hills' are also popular, again with variation by month – 'rural coastline' preferred in September, 'mountains or hills' in August. Intention to take a trip to a 'large city' or a 'smaller city or town' are both relatively low.

Figure 27. Main type of destination for next Wales trip in July and September, Percentage, April to June fieldwork, UK

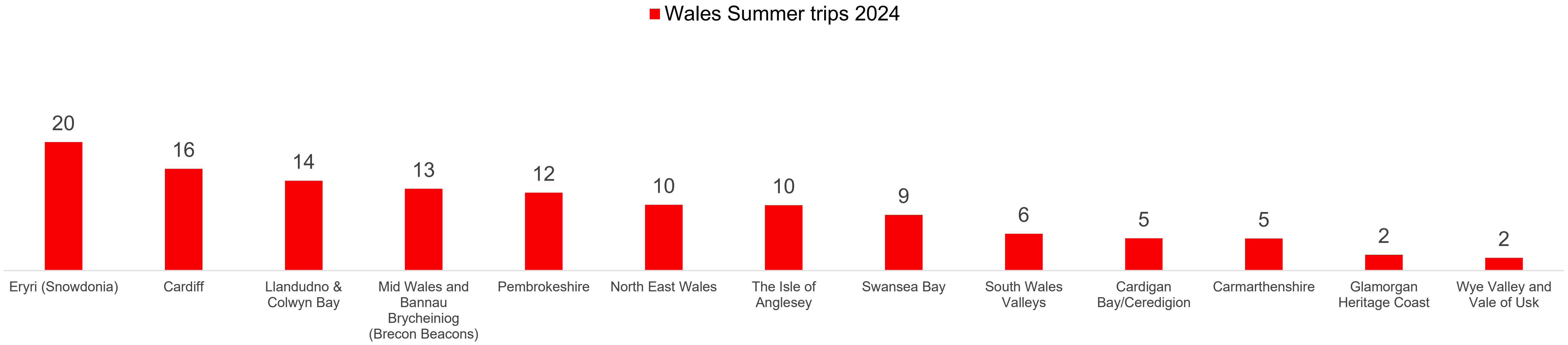


QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

Planned destination in Wales this summer amongst Wales intenders

- Consistent with previous reporting, Snowdonia is the number one intended destination for an overnight trip in Wales this summer, with other North Wales destinations such as Llandudno and Colwyn Bay also featuring strongly. Despite relatively low intentions to visit a 'large city', Cardiff is the second most preferred planned Wales destination – and the most preferred in August.
- Intentions are spread across the Wales, with Mid Wales & Brecon Beacons the fourth most preferred and Pembrokeshire fifth.

Figure 28. Planned Wales destination for next trip between <u>July and September</u>, Percentage, April to June fieldwork, UK



QVB4viii. Where in Wales do you expect to be staying on this next holiday or short break?

Base: Base: Wales summer 2024 intenders n=192

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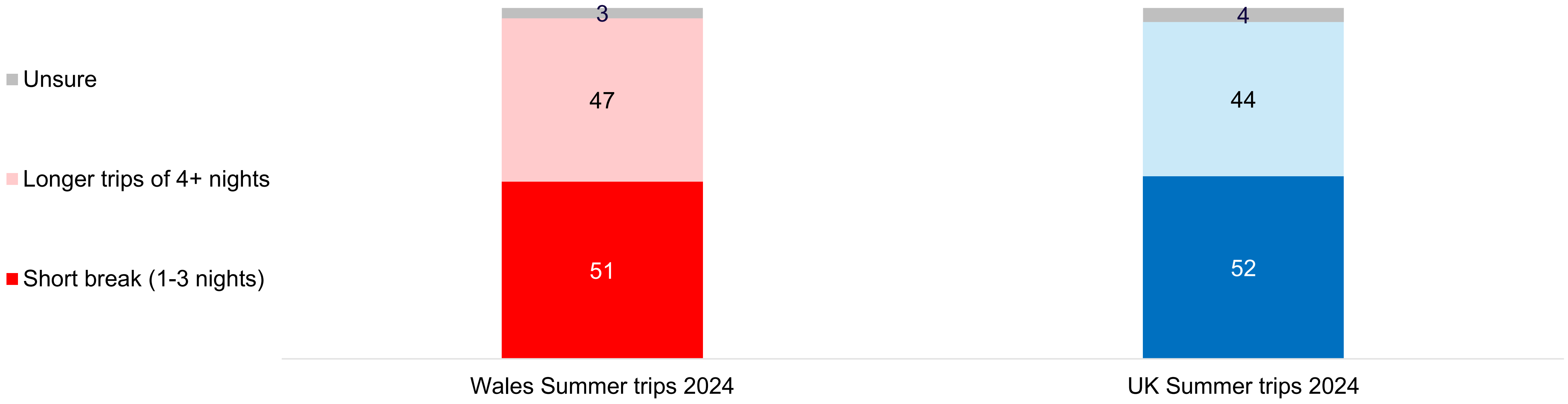
Length of trip on next Wales summer short break or holiday

- Around half of Wales intenders are anticipating their Wales summer trip to be a short break, more than the proportion that expect it to be a longer trip of 4+ nights. Generally trips are more likely to be shorter than in 2023, implying that people are cutting back on their trip spending.

Figure 29. Length of next Wales trip between <u>July and September</u>, Percentage, April to June fieldwork, UK

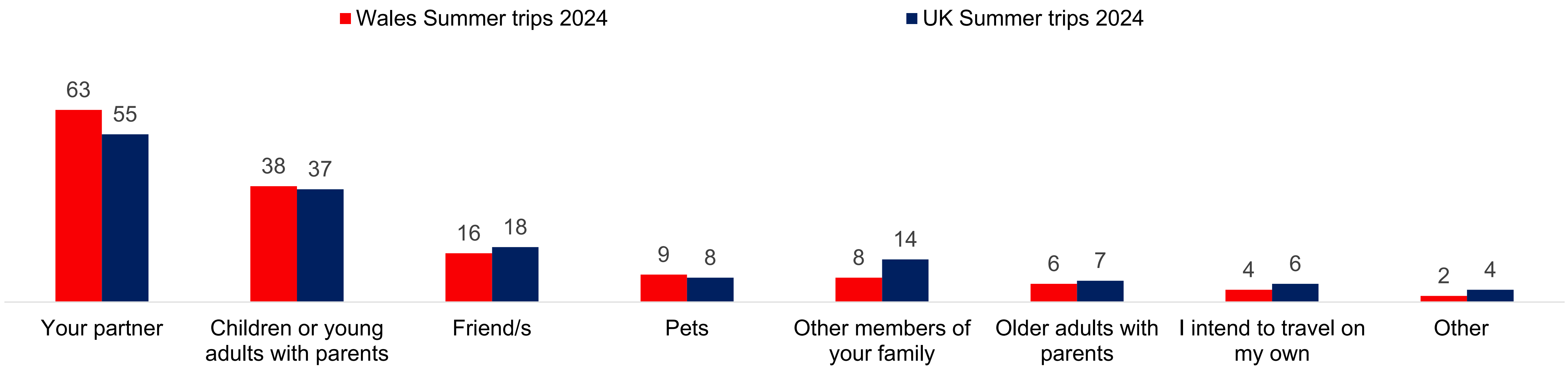


VB3. Is this next trip in <INSERT MONTH FROM VB2A> likely to be a short break (1-3 nights) or a holiday (4+ nights)? VB6f. And which of the following best describes the purpose/s of this trip? Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

Make-up of visitor party for next Wales summer overnight trip

- Amongst Wales intenders, a ‘partner’ is the most common accompanying party member for a trip (at 63% higher than across the UK), followed by ‘child, grandchild or young adults with parents’ (at 38% and rising to 57% in August).   A notable minority of Wales intenders are also likely to travel with ‘friends’ (16%) and ‘pets’ (9%).

Figure 30. Visitor party make-up for Wales intenders in July and September, Percentage, April to June fieldwork, UK



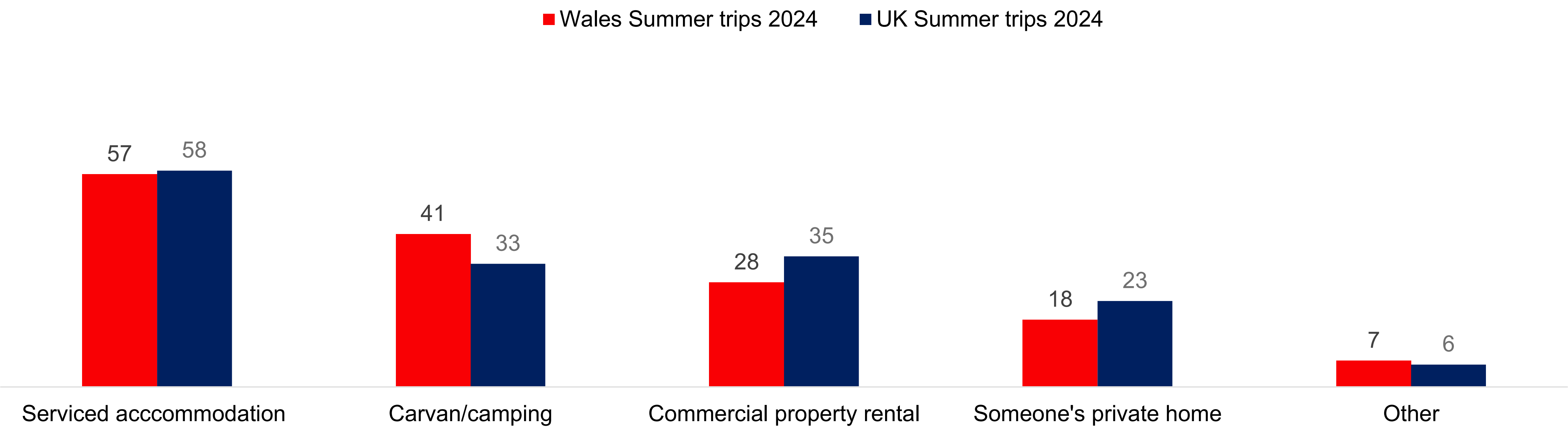
QVB4d. With whom are you likely to be spending your holiday?

Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

Type of accommodation for next Wales short break or holiday

- 'Serviced' accommodation' (including hotels, B&Bs, farmhouse and serviced apartments) is the most likely accommodation type for a Wales trip this summer, followed by 'caravan/camping' and 'commercial property rental'. 'Caravan/camping' is particularly prevalent in August (at 42%) and amongst families (at 47%).
- The large percentages indicate that with most intenders not yet having booked their trip, they are still considering multiple options.

Figure 31. Accommodation choice on next overnight trip for Wales intenders in July and September, Net percentage, April to June fieldwork, UK, Condensed categories



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

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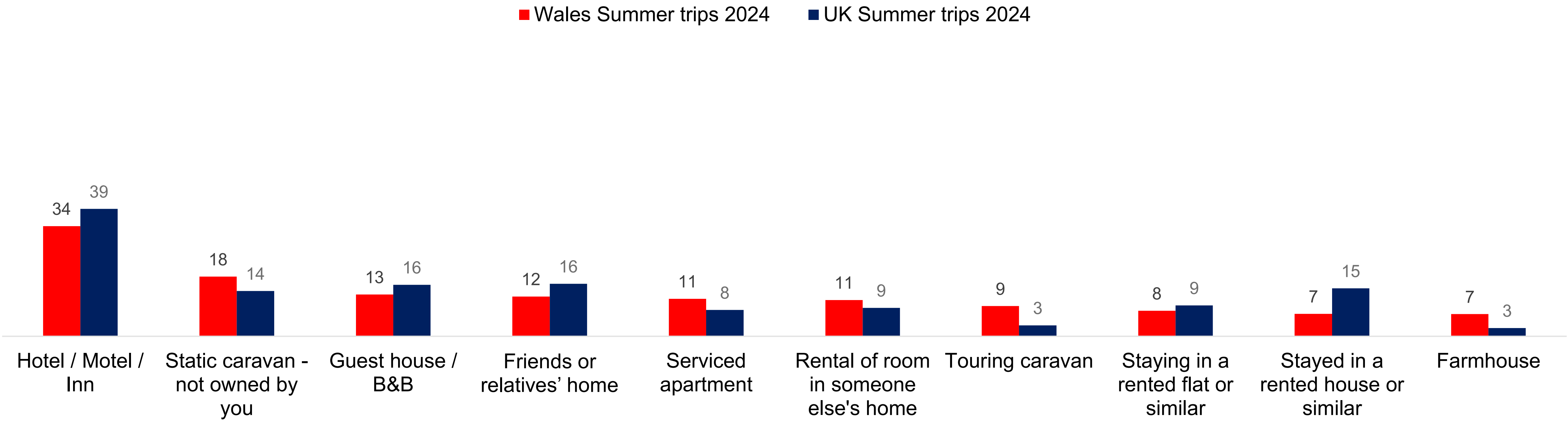
Type of accommodation for next Wales short break or holiday – Top 10

- The most common single accommodation type intended for Wales summer trips is 'hotel/motel/inn' (particularly high in July and September) followed by 'static caravan – not owned by you' (highest in September). 'Guest house/B&B' and 'friends or relatives' homes' are also popular options.

Figure 32. Accommodation choice on next overnight trip for Wales intenders in July and September, Net percentage, April to June fieldwork, UK, Top 10



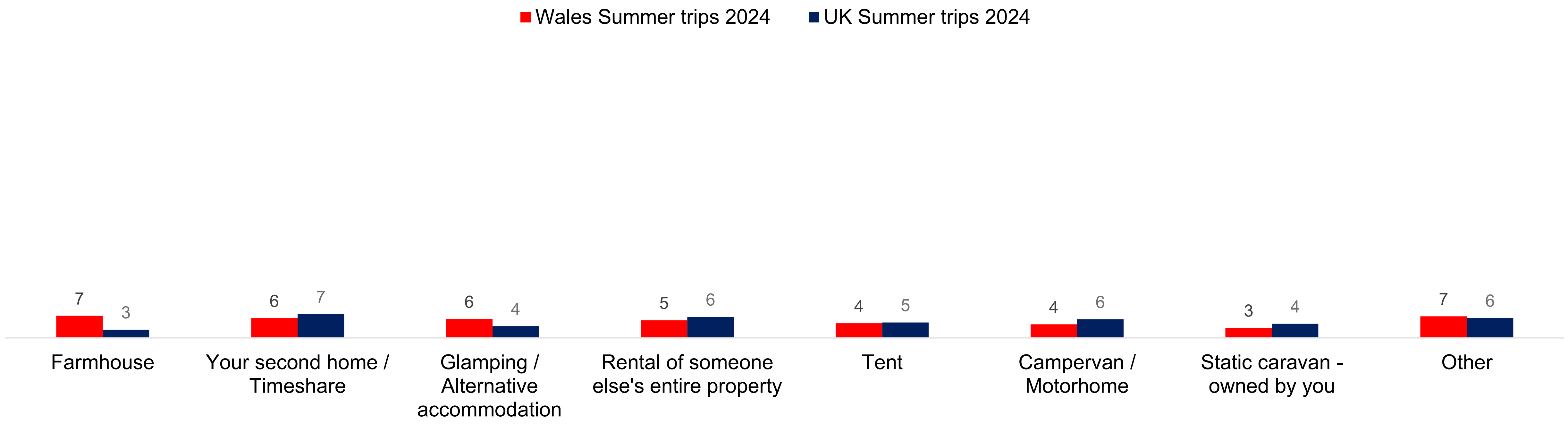
QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?

Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

Type of accommodation for next Wales short break or holiday – other

- A range of other accommodation options are also being considered by Wales intenders, including ‘farmhouse’, ‘second home/ timeshare’ and ‘glamping/alternative accommodation’.

Figure 33. Accommodation choice on next overnight trip for Wales intenders in July and September, Net percentage, April to June fieldwork, UK, Other

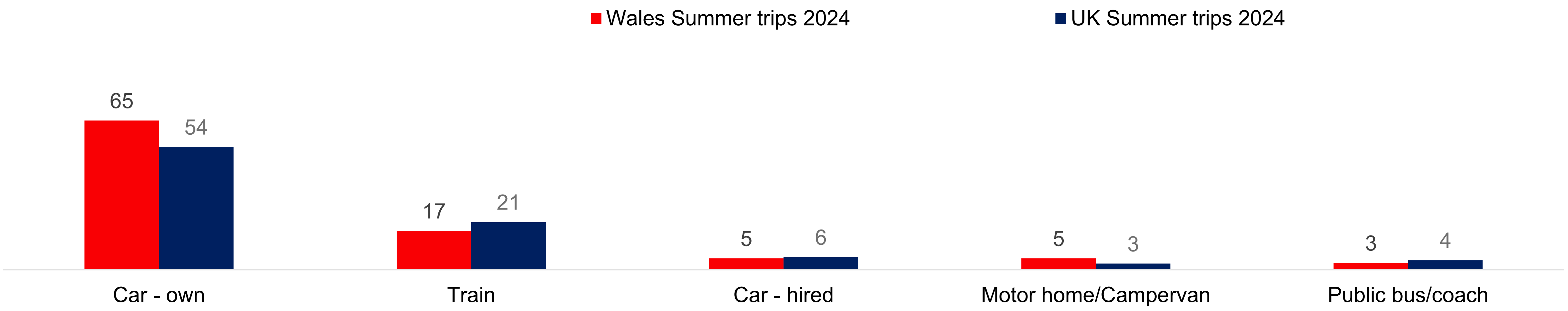


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

Main mode of transport for next Wales short break or holiday

- Unsurprisingly given the dominance of rural destinations, Wales intenders are most likely to travel to their destination using their own car – at 70%, higher than amongst UK intenders (54%). Train is the second most common mode of travel.

Figure 34. Main mode of transport for Wales intenders in summer 2024, Percentage, April to June fieldwork, UK



VB4c. What do you anticipate being the main mode of travel to your next UK holiday or short break destination in <INSERT MONTH FROM VB2A> ? Base: Wales summer 2024 intenders n=192; UK summer 2024 intenders n=2,162

Methodology

Methodology

The findings in this report are based on a monthly online survey conducted amongst a nationally representative sample of the UK population.

The sample is representative of UK adults aged 16+ by gender, age, government region and social grade.

In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ in Scotland and Wales to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.

This report aggregates the results taken from Waves 69-71 of the Domestic Sentiment Tracker

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