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Wales Tourism Business Barometer

Summer 2025 wave



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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Wales Tourism Business Barometer: Summer 2025 wave

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

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1. Headline findings

Mixed year continues

Following on from earlier barometer waves this year, industry performance remains mixed in most sectors. Overall, 29% of tourism businesses have had more customers this summer compared to last summer, and a further 45% have had the same level. However, 26% report a decrease. Differences in performance by region are not significant.

Much better weather than last summer

Summer 2025 (June to August) was the warmest summer on record in the UK according to the [Met Office](#), with above average levels of sunshine and below average rainfall. Over half (57%) of businesses with increased customers this summer attribute their upturn unprompted to the weather, which was mixed last summer. In particular, 90% of caravan & campsites and 68% of attractions with increased business attribute it to the weather.

But lack of disposable income continues to hamper demand

Two in five (40%) businesses with decreased customers attribute their downturn unprompted to 'people lacking in disposable income'. This is by far the most frequently cited reason, ahead of 'Welsh Government policies' (22%).

Most businesses hold repeat customers in high regard

In response to a set of prompted statements, 12% of operators say that 'we are very focused on attracting new customers' best describes their approach towards new and repeat customers. However, a far larger proportion (68%) agree more with 'we are interested in attracting new customers, but it's more important to encourage and maintain repeat business'. Repeat customers are of great value because they bring stability and are easier and less costly to maintain as a customer base than frequently striving to attract new ones. Many operators go to great lengths to encourage existing customers to return.

Confidence to operate profitably

About one in five (21%) operators feel 'very confident' to operate profitably this year and a further 31% say they feel 'fairly confident'.

2. Background and method

What is the Wales Tourism Business Barometer?

The Wales Tourism Business Barometer is designed to give quick feedback on how the tourism industry in Wales is performing at key times during the year. This wave looks at summer performance. The ad-hoc topics this time are intentions to attract new or repeat customers, and online bookability.

How was the survey conducted?

We have conducted 900 interviews by telephone. The results of questions asked to everyone are accurate to $\pm 3.3\%$. The balance of the sample by region and sector broadly reflects the industry in Wales. The contact database used is a combination of Visit Wales' list of graded businesses and databases of non-graded businesses that we have sourced from an independent supplier.

Table 1: Research sample by sector and region

Sector / Region	North	Mid	South West	South East	Total
Serviced accommodation	135	26	69	30	260
Self-catering	58	57	77	22	214
Caravan / campsites	44	16	31	12	103
Hostels	3	4	7	2	16
Attractions	30	22	33	21	106
Activity operators	14	7	6	7	34
Restaurants / pubs / cafes	55	28	48	36	167
Total	339	160	271	130	900

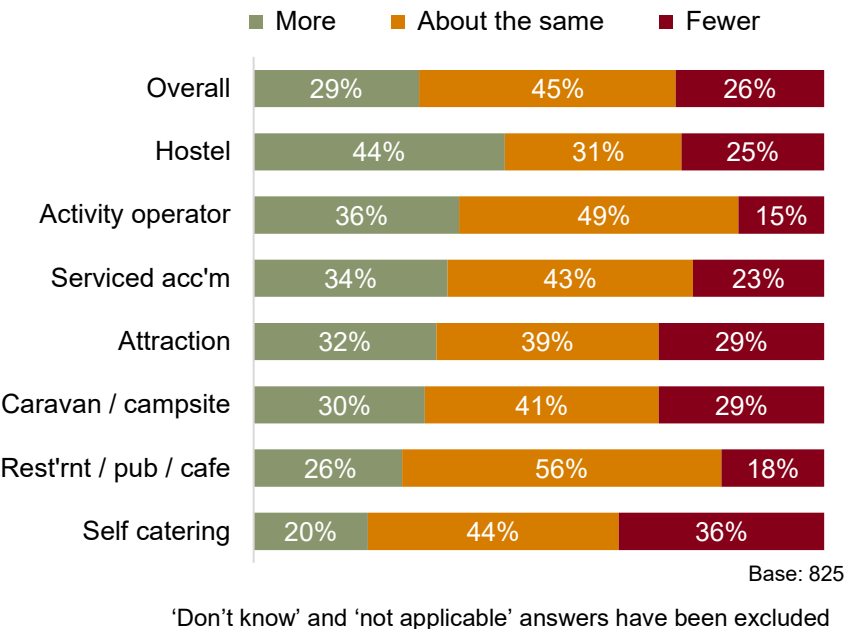
56% of businesses in the sample are graded by Visit Wales. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes, where grading is not applicable.

All telephone interviews have been conducted with business owners or managers between 1st and 17th September 2025.

3. Summer performance in 2025

Performance by sector

Figure 1: Q1 "How many customers have you had this summer compared to summer last year?" by sector



Mixed year continues

Following on from earlier barometer waves this year, industry performance remains mixed in most sectors. Open comments are quite polarised, with some operators speaking very enthusiastically about how well business has gone this summer, whereas others report a very different experience.

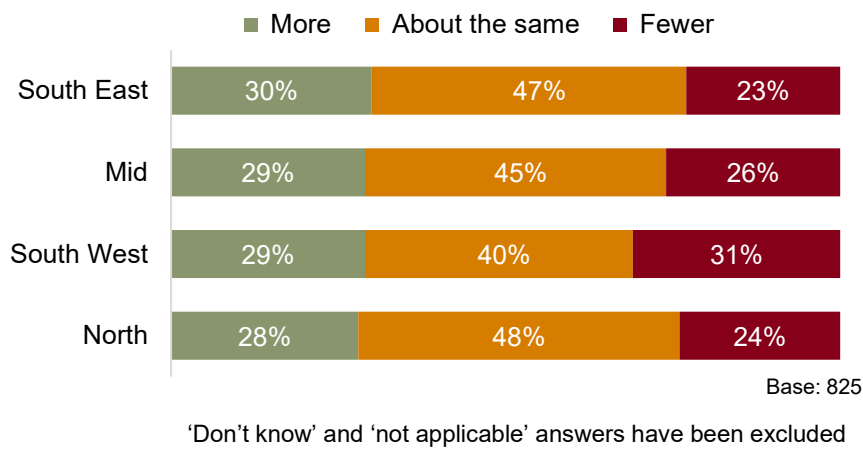
“We have been absolutely rammed all summer”
Hostel, North

“This summer has been the busiest summer ever. We are very happy and satisfied that we had so many repeat customers.”
Caravan park, South East

“It's been a shocking year”
Self-catering, Mid

Performance by region

Figure 2: Q1 "How many customers have you had this summer compared to summer last year?" by region



Performance does not differ significantly by region

Mixed feedback on summer performance can be found within each region. Sometimes one operator within a particular sector and region can be found to have performed very well, only for another one to say the opposite.

“We’ve been extremely busy”
Caravan park, North

“Worst year ever”
Caravan park, North

We discuss the reasons for being busier or quieter next.

Reasons for being busier

Figure 3: Q2 "Are there any particular reasons why you have had more customers this summer?" (unprompted)



Q2 has been asked to businesses having more customers this summer (Q1). Respondents could give more than one answer.

Fine summer weather

Summer 2025 (June to August) was the warmest summer on record in the UK according to the [Met Office](#), with above average levels of sunshine and below average rainfall. Over half (57%) of businesses with increased customers this summer attribute their upturn unprompted to the weather, which was mixed last summer. In particular, 90% of caravan & campsites and 68% of attractions with increased business attribute it to the weather.

"Nice weather this year, so people have been outdoors more"
Attraction, North

Weather conducive to last minute bookings

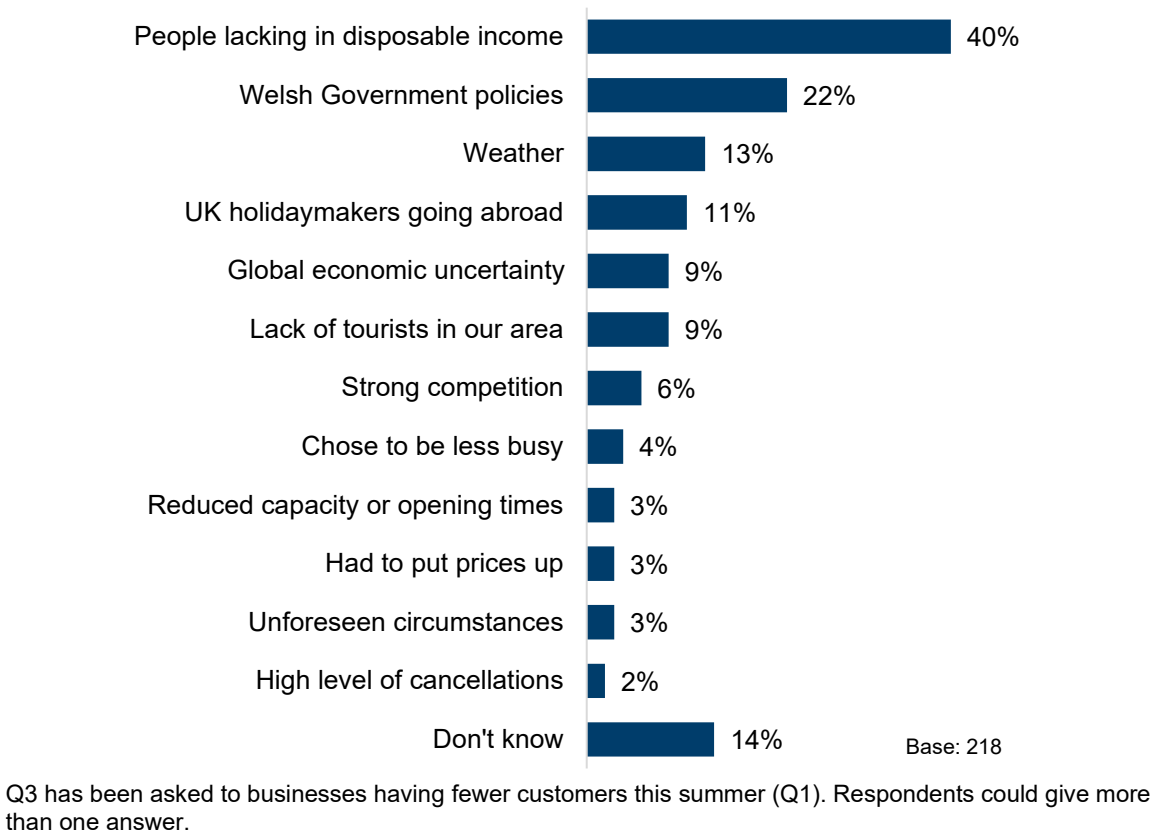
Numerous operators (in this wave as well as in other recent waves) say that there is a strong trend for customers to book last minute compared to pre-Covid years. Waiting to see what the weather forecast will say is thought to be one of the two key reasons (the other being disposable income). The fine weather this summer has therefore drawn out many last minute bookings.

"A lot of last minute bookings as people are weather watching"
Caravan park, North

“I was panicking in June because the summer was looking quiet but all the gaps got filled in with last minute bookings”
Self-catering, South West

Reasons for being quieter

Figure 4: Q3 "Are there any particular reasons why you have had fewer customers this summer?" (unprompted)



Lack of disposable income

This remains the most frequently cited reason for being quieter. Operators are noticing shorter overnight stays, day trips instead of overnight stays and lower spending.

“There have been a lot more changeovers because people are booking shorter stays so there's more cleaning and laundry cost involved”
Self-catering, South West

“Bills are going up and footfall is going down. Worst August since before Covid. People can't afford the luxury of staying in a B&B and are just coming for day trips.”
Serviced, North

“A lot more day-trippers with their own packed lunches”
Serviced, North

Welsh Government policies

Around one in five (22%) businesses cite Welsh Government policies unprompted as a reason for being quieter. This is more so the case among self-catering operators (39%). As reported before, policies which are felt to be hampering bookings are:

- Impending tourism levy, because of customer uncertainty of when, where and how it will be introduced
- '182 days rule': some operators believe this gives off an impression to visitors that Wales does not welcome them. Although this feedback is based on businesses' responses, it would be useful to understand consumers' awareness of legislation and how it impacts their perceptions of Wales.
- 20mph speed limits, because some English visitors are nervous about getting caught speeding or don't understand that the limit doesn't apply to every road in Wales

"I've been talking to the father of the family of 7 that have just left. They're from Warrington and won't come back to Wales as often when the tourist tax is in place."

Self-catering, Mid

"182 days is far too high. The rhetoric needs to change: needs to welcome to English tourists."

Self-catering, North

"3 or 4 people have cancelled because of the 20 mph. They thought they wouldn't know where it is and were worried they would lose their licenses."

Caravan park, South West

Weather not necessarily good everywhere all the time

Some bad weather did creep in towards the end of the summer, and also, 'good weather' for businesses in some locations (by the beach) is not necessarily good news for businesses inland. Many (45%) attractions with decreased visitor levels attribute their decline to the weather, which was 'too good' for spending time indoors.

"We had a family of 6 knocking on the door at 10:30 pm bank holiday weekend as their tent had blown away in the storm and we could accommodate them"

Serviced, North

"When the weather is fine, people tend to have beach days instead of visiting us"

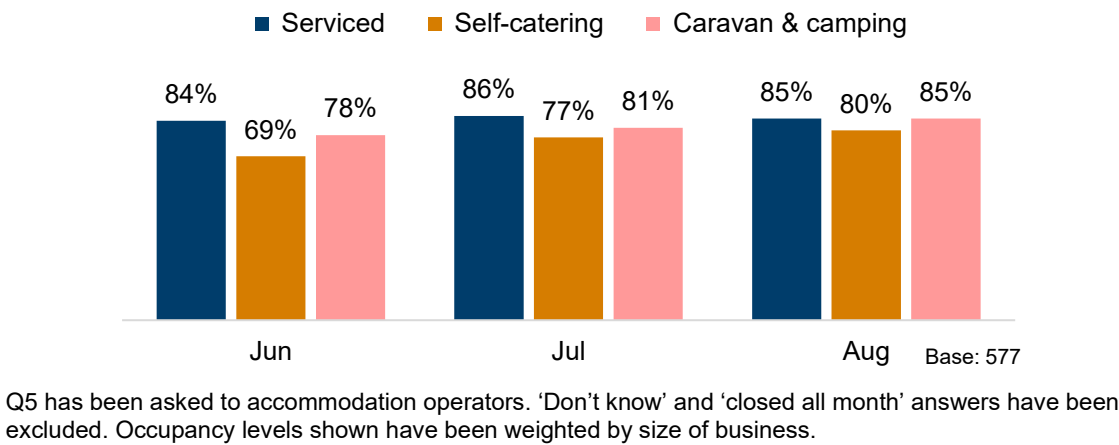
Attraction, North

"The cottages right on the beach were fully booked for June, July and August. The ones further away were around 40% occupancy."

Self-catering, South West

Summer occupancy levels

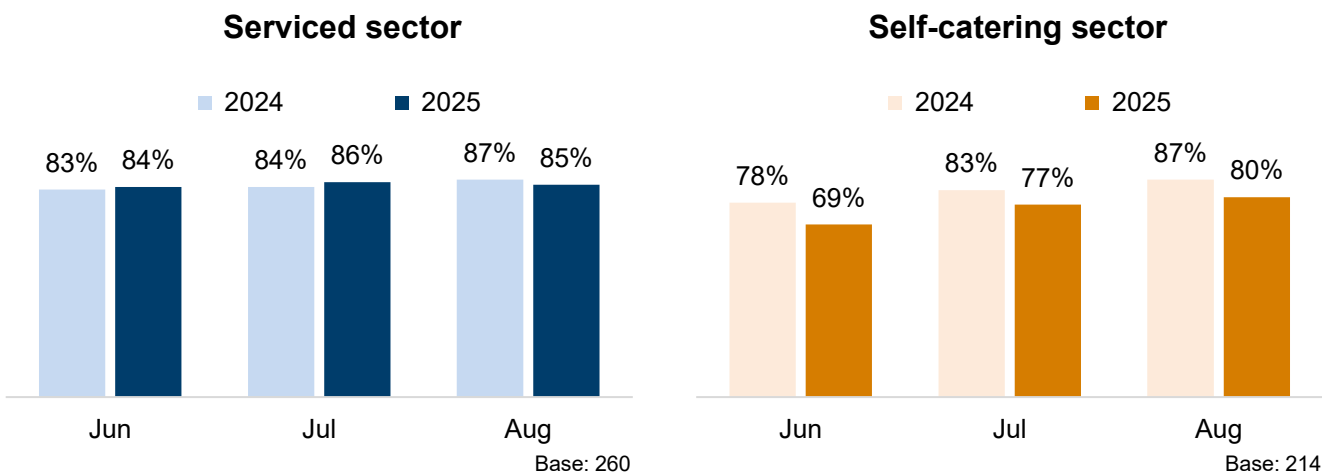
Figure 5: Q5 "How much of your available capacity was booked for ... ?" (accommodation operators)



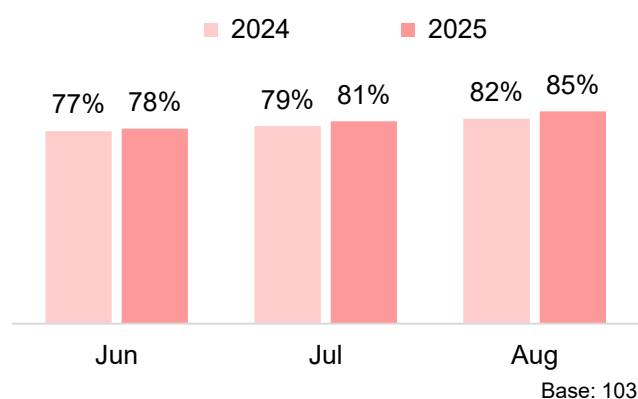
Summer occupancy rates down on last year for self-catering

Net occupancy rates in the serviced and caravan & camping sectors were very similar to last year in each summer month but significantly down on last year in self-catering. The charts below show these year-on-year differences in sector occupancy:

Figure 6: Net occupancy year-on-year comparison



Caravan and camping sector



Lots of last minute shorter stays

The trend this summer has been towards shorter booking lead times for shorter stays, which does not help the well-being of operators, who would ideally rather longer stays that they know about further in advance.

“We have had more single-night stays rather than two-night stays, which has been humongously hard work”
Serviced, North

“We’re having short notice bookings with a lot of cancellations and re-bookings. It’s been a bit hand to mouth but we got there in the end ... July and August used to be booked up the previous year but I’ve been taking August bookings in August this year.”
Self-catering, Mid

Differences by region

Table 2: Net occupancy by sector and region

Sector / Region	June to August occupancy				
	North	Mid	South West	South East	All Wales
Serviced	85%	81%	87%	83%	85%
Self-catering	84%	59%	86%	91%	75%
Caravan & camping	83%	80%	80%	80%	81%

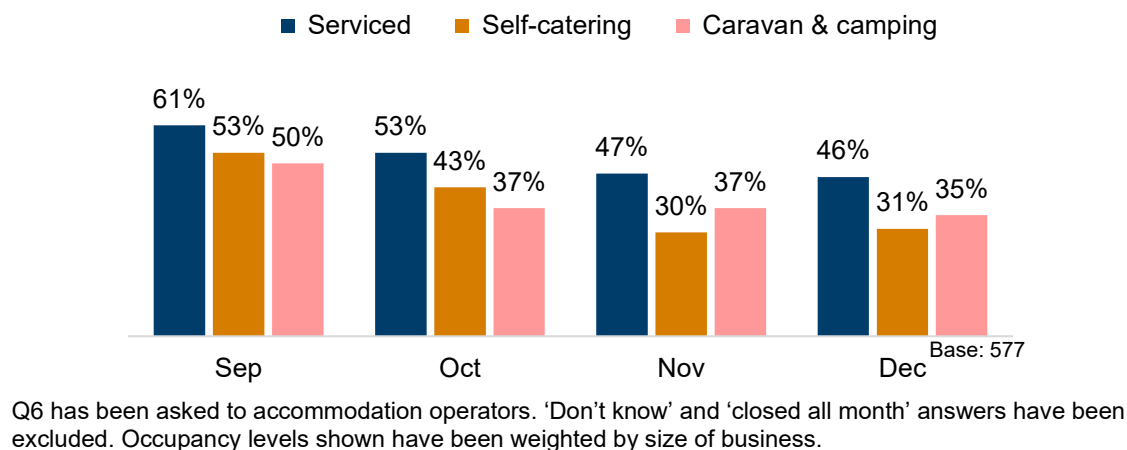
The serviced and caravan & camping sectors have seen good consistency in occupancy across the regions of Wales, whereas in the self-catering sector, mid Wales as a region has struggled.

“We’re getting weekend bookings but nothing during the week. We’re getting older so don’t mind. It gives us longer to prepare for the next guests.”
Self-catering, Mid

4. Advance bookings and confidence

Advance bookings

Figure 7: Q6 "How much of your available capacity is booked for ... ?"



Outlook for the autumn

The last minute trend makes the autumn hard to predict as consumers watch the weather forecasts and their disposable income.

"We are in the process of doing offers for the winter months to attract more people into the area. They will go live next week."
Serviced, North

"A lot of UK bookings have been last minute. We are expecting a busy October with people wanting to get away before Christmas and then we would have reached our target and close for the winter."
Serviced, North

Differences by region

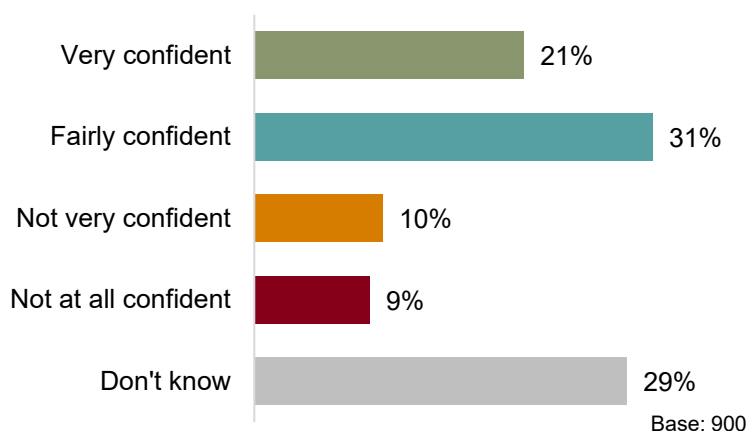
Table 3: Booked occupancy by sector and region

October to December occupancy					
Sector / Region	North	Mid	South West	South East	All Wales
Serviced	48%	44%	38%	60%	49%
Self-catering	32%	20%	35%	54%	35%
Caravan & camping	low base	low base	low base	low base	36%

There are differences by region in current occupancy levels but the last minute booking trend means that this picture could all change nearer the time.

Confidence to operate profitably

Figure 8: Q7 "How confident do you feel about running the business profitably this year?"



Mixed levels of confidence

About half (52%) of operators feel confident about running their business profitably this year. The proportions feeling 'very confident' are higher among:

- Caravan & campsites (28%)
- Serviced accommodation (26%)
- Restaurants / pubs / cafés (23%)
- Businesses in South East Wales (28%)

Dealing with high operating costs is more of a concern than attracting customers for many. In the self-catering sector, many businesses are struggling to meet the '182 day rule' and may see their costs rise beyond what they consider worthwhile to operate.

"I'm hugely hopeful for the UK Government's new budget to lower tax for hospitality. We need help with business rates; we're worried about bills."
Restaurant, South West

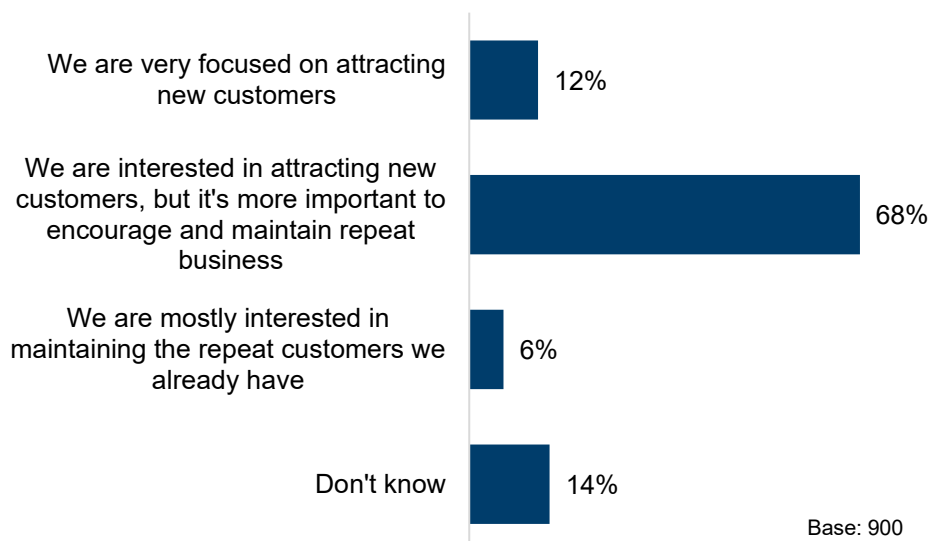
"The question is debatable because our council tax [on second home ownership] has doubled"
Self-catering, Mid

"I'm having to get out of the business because of this 182 day rule. We can't afford to pay double council tax."
Self-catering, South East

5. Intentions to attract new or repeat customers

Relative priorities

Figure 9: Q8 "Which of the following three statements would you say best describes your business' approach towards new and repeat customers?"



Repeat customers are the bedrock of the industry

Whilst some operators are focused on actively trying to attract new customers, most operators value repeat customers more. They bring a degree of stability, especially outside of peak season. They can also be more profitable because they are more likely than new customers to book direct, whereas attracting new customers often involves paying commission to a third party because of lack of own marketing power.

"For 38 years we have been fully booked between 42 to 48 weeks a year. We have had families coming back for years and they are our bread and butter."
Self-catering, North

"We've been using a booking agent for the last couple of years. It's helped a lot but, of course, they take 20% of the profit. We have a loyal core of repeat customers but like to attract new ones too."
Self-catering, South West

"Our Facebook page hasn't been active for 5 months, simply because we've been so busy. Repeat custom is very important to us."
Serviced, North

Attracting and maintaining a steady flow of repeat customers can work well for businesses, but some are aware of not getting caught out by that income stream dying off.

"For years our repeat guests have been older people and we've concentrated on looking after them but a lot have passed away so we're focussing on attracting new customers now. Our new booking system is now compatible with other platforms."
Caravan park, Mid

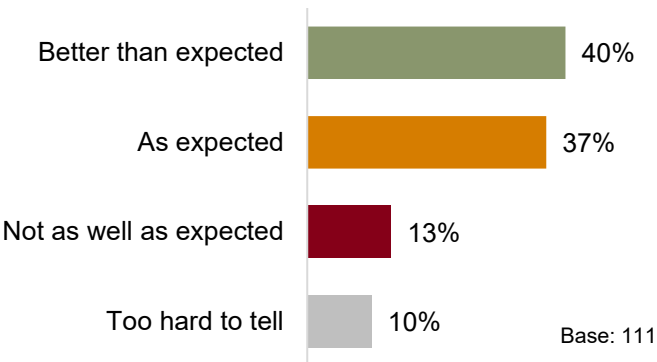
Some businesses try to maintain a balance

The main reason for some respondents answering ‘don’t know’ to the above question is that they are careful not to prioritise one type of customer over the other (new vs repeat). They feel that they should focus on both.

“We change our displays and value new and repeat customers equally”
Attraction, South West

Success in attracting new customers

Figure 10: Q9 “How well do you think your business has done this summer in terms of attracting new customers?”



Q9 has been asked to those answering ‘We are very focused on attracting new customers’ in Q8

Many have exceeded their own expectations in attracting new customers

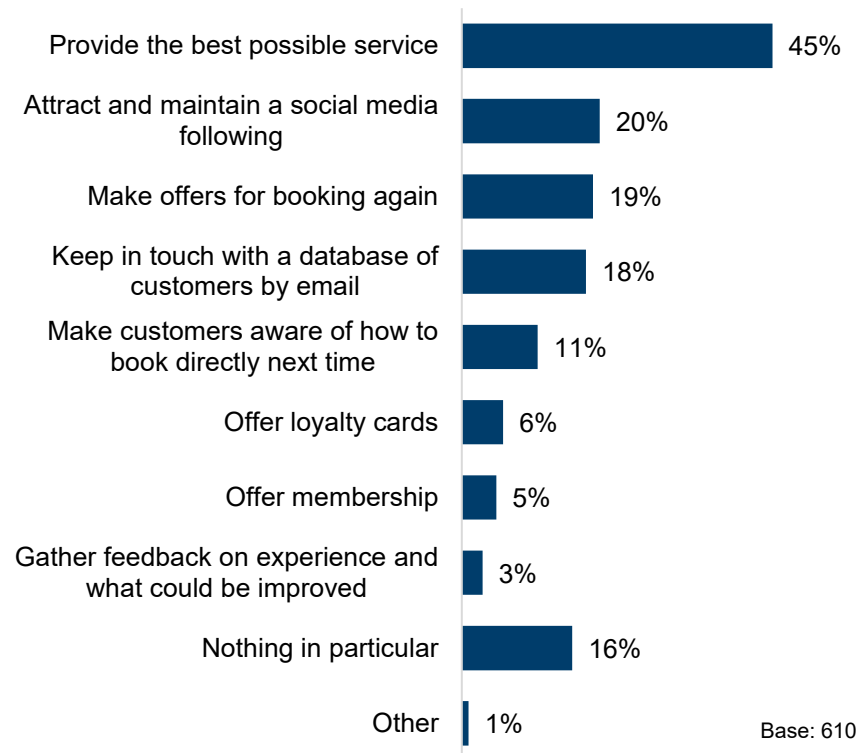
Two in five (40%) of those focused on attracting new customers say their business has done ‘better than expected’ in this regard. This compares to a much lower proportion (13%) saying they have done ‘not as well as expected’. In the serviced sector, 59% say they have done ‘better than expected’ in attracting new customers.

“We are focused on attracting new customers because we’re confident that we’ll get repeat ones anyway. We went out and secured more bookings this summer.”
Activity operator, North

“We’ve marketed with Visit Wales and together with that, the weather and a new online booking service, we’ve done better than last summer.”
Activity operator, Mid

Encouraging and maintaining repeat business

Figure 11: Q10 “What does your business do, if anything, to encourage and maintain repeat business?” (unprompted)



Q10 has been asked to those answering ‘We are interested in attracting new customers, but it’s more important to encourage and maintain repeat business’ in Q8. Respondents could give more than one answer.

Best service to encourage repeat visits

Operators who are focused on encouraging and maintaining repeat business achieve this in a variety of ways, the most important one being to provide the best possible service whilst they have the chance. This sometimes involves going above and beyond what the customer has paid for.

“I have guests staying with us for the third time. We’ll put a bottle of something in their room, as it’s one of their birthdays.”
Serviced, South West

“I sometimes leave a gift box for long term repeat guests”
Self-catering, South West

Keeping in touch

Some operators work hard to keep in touch with their customers through email or social media. The main aim is to try and keep their business in customers’ minds.

“If we know about a birthday or anniversary, they always get a card from us”
Serviced, South West

“We have a strong rapport with repeat customers. We send photos after their sessions and maintain online contact with them.”

Activity operator, South West

Making offers for booking again

Some operators take every opportunity whilst the customers are there to entice them to book again, sometimes by offering an incentive.

“If people book again with us when they leave, they get 10% off”

Caravan park, North

“We give a free bottle of wine to guests who return within 6 months”

Serviced, South West

‘Please book directly next time’

Third parties such as OTAs can be very useful for attracting new customers. Small businesses do not have the resources to compete effectively for new customers without using them. However, operators lose a fairly substantial part of their margin in commissions and so a common tactic deployed is to use third parties to win customers in the short term but then find ways of encouraging them to book directly next time. The aim is to build up a core of more profitable customers in the long term.

“If they book through my own website they get a 7% discount”

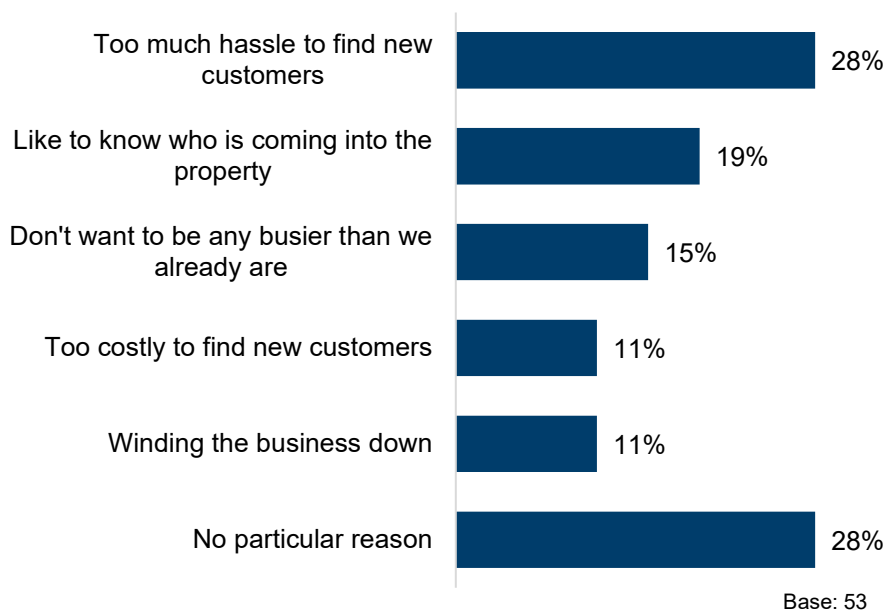
Self-catering, South West

“We give out leaflets that tell people they can get 30% off if they book directly, and when they’re leaving, we always ask them if they’ve booked for next year”

Caravan park, North

Reasons for focusing on existing customers

Figure 12: Q11 “Are there any particular reasons why you are mostly interested in maintaining the repeat customers you already have?” (unprompted)



Q11 has been asked to those answering 'We are mostly interested in maintaining the repeat customers we already have' in Q8. Respondents could give more than one answer.

‘I like to know who’s coming’

Some small operators are keen to know who is coming into their property and whether they will respect it. They feel more comfortable inviting in people they already know from before, whereas new customers pose a risk.

“It's an old business with a very established customer base. Our guests are nice and polite, and they look after the property.”

Self-catering, South West

“I've been doing it for 50 years and am mostly retired now. I only open for friends, for the Royal Welsh Show. I don't advertise.”

Serviced, Mid

Targeting new customers doesn't always work out

Attracting new customers requires cost and effort. Repeat customers by comparison are less costly to attract back again because they already know about the business and may be more inclined to book directly. Some operators have tried to attract new customers but without much success.

“I've been at it for 52 years so have a lot of return guests. They know to book directly. I've been busy from May.”

Serviced, South West

"We have such a high return rate. It works better than trying to attract new guests. I tried that route and it wasn't successful."

Caravan park, South West

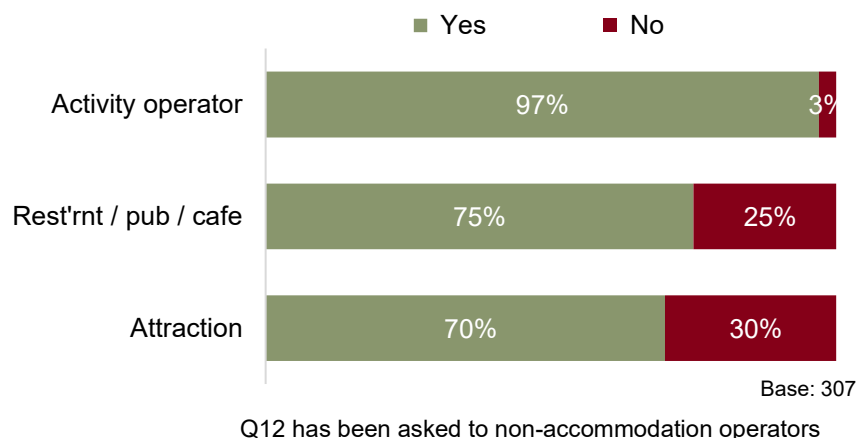
"There are no new customers out there. There are no phone calls, no email enquiries ... so we're holding tight to the customers we have."

Caravan park, Mid

6. Online bookability

Taking advance bookings (non-accommodation)

Figure 13: Q12 “Does your business take advance bookings?”



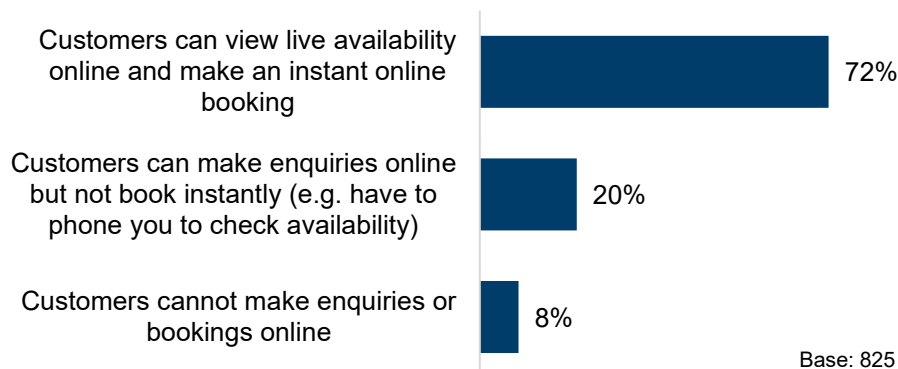
Most non-accommodation operators take bookings

Almost all activity providers and the majority of attractions, restaurants, pubs and cafés take advance bookings. Some attractions say they take bookings for events, but not for 'normal' entry.

“We don't normally take bookings for entry to the park but we have bookings for events. There's an event page on our website so people mostly book online.”
Attraction, Mid

Degree of online bookability

Figure 14: Q13 “Which of the following best describes if and how your customers can make a booking online?”



Q13 has been asked to all accommodation operators, and non-accommodation operators who take advance bookings

Most accommodation offers live availability and instant booking

The proportion of businesses offering live availability and instant booking is higher among accommodation operators (81%) than non-accommodation operators which take bookings (49%). This is often as a result of platforms which operators are signed up to.

“We get most of our bookings through Booking.com”
Self-catering, Mid

Some exceptions are made for instant bookings when the operator needs more time to plan or discuss requirements, e.g. for larger groups.

“If they want to book a bigger party, they need to go through us, not book online”
Restaurant, North

“Group bookings are made by phone or email but not instantly”
Attraction, Mid

‘We like to vet who’s coming’

Some operators don’t like accepting instant bookings because they can’t control who they allow into their property. They like to have some means of vetting them first.

“I need a day's notice to filter out the idiots”
Self-catering, South West

“People can check availability online but not book instantly. They need to contact me. I don't like instant booking because you don't know who you're going to get.”
Self-catering, South West

“We don't let people book online because we are selective. We do choose the type of people to stay in our lodges because we respect our neighbours.”
Self-catering, North