



Wales Tourism Business Barometer

Summer 2026 wave



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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Wales Tourism Business Barometer: Summer 2026 wave

Anthony Lydall, Strategic Research and Insight



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

For further information please contact:

Research and Insights Team

Visit Wales

Economy, Energy and Transport

Cathays Park

Cardiff

CF10 3NQ

Email: tourismresearch@gov.wales

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1. Headline findings

Warm sunny weather attracted visitors

About a third (34%) of businesses have had more visitors this summer compared to last summer, and 45% have had the same level. Only a minority (21%) of businesses report a decrease. The upturn is consistent across all sectors and regions. For reference, the 2025 summer was about on par with 2024.

The most frequently cited reason for being busier is the weather (reported unprompted by 54% of operators being busier). Summer 2026 (June to August) was provisionally the warmest summer on record in the UK according to the [Met Office](#), with many days above 30 degrees and very little rainfall until towards the end of August.

Uncertainty over disposable income continues to hinder demand

Not all businesses have enjoyed a busy summer, and their most frequently cited reason (unprompted) is 'people lacking in disposable income' (34%). Some businesses also point out that the warm weather did not help them, especially indoor attractions during spells of pleasant outdoor temperatures, or outdoor attractions offering little shade during heatwaves.

Upturn in overseas visitors

A third (32%) of businesses say they have had more overseas visitors than last summer, and half (50%) have had the same level. Mainland European markets have performed well, especially Germany and the Netherlands.

Tour de France cycling opportunities

Some (13%) businesses say that cycling tourism is 'very important' to the future of their business and a further 22% say it is 'fairly important'. Among those considering cycling tourism to be important, 42% plan to take advantage of the long-term opportunity brought by the Tour raising the profile of cycling in Wales.

Meeting accessibility needs

One in five (20%) operators feel their business is 'very well' set up for customers with accessibility needs, and a further 40% consider they are 'fairly well' set up. Half (50%) of those considering to be well set up say they actively promote their business as such.

About a quarter (23%) of operators are interested in receiving advice from Visit Wales on how their business could become more accessible. The advice they seek the most is:

- How to apply for grants (69%)
- How to meet needs cost-effectively (52%)
- Explanation of the different needs and how to meet them (52%)
- How to be legally compliant (45%)

Confidence

About one in five (18%) operators feel 'very confident' about running the business profitably this year, and a further 44% feel 'fairly confident'. The fine summer weather has boosted visitor numbers but some operators point out that remaining profitable is hard work due to rising costs.

Good summer performance has helped to increase confidence this year. Confidence levels measured at the same time last year were hampered significantly by the rising cost of living. In September 2025, 21% of operators were feeling 'very confident' and 31% were feeling '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 important times during the year. This wave looks at performance in summer 2026. The ad-hoc topics this time are the importance of cycling tourism and provision for customers with accessibility needs.

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	90	65	63	53	271
Self-catering	80	51	67	23	221
Caravan / campsites	34	33	38	14	119
Hostels	7	3	11	4	25
Attractions	67	30	33	28	158
Activity operators	16	11	15	17	49
Restaurants / pubs / cafes	22	12	5	8	57
Total	316	205	232	147	900

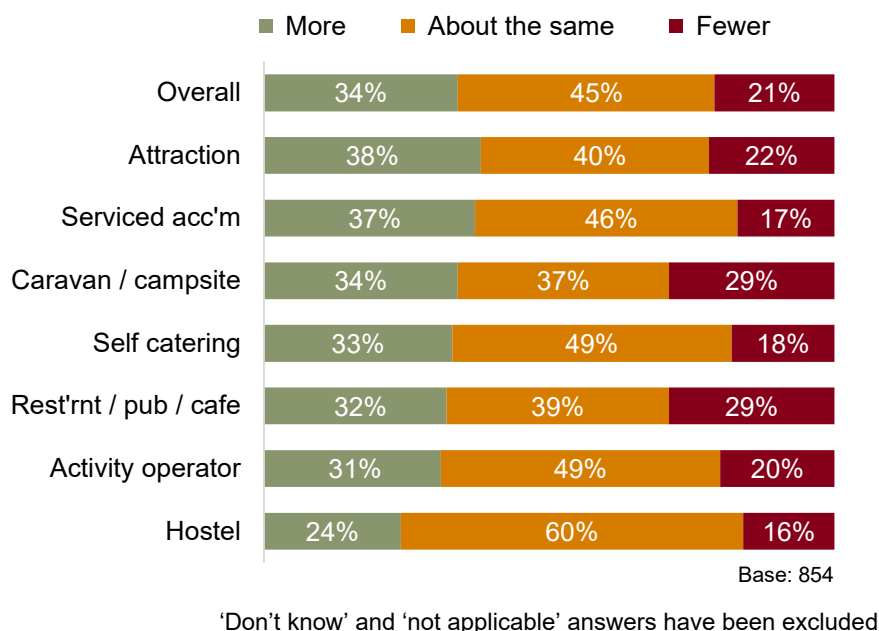
72% of businesses in the sample are graded by Visit Wales. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafés, where grading is not applicable.

All telephone interviews have been conducted with business owners or managers between 2 and 22 September 2026.

3. Summer performance

Performance by sector

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



Fine weather boosts visitor levels

All sectors of the industry report being up on balance during the summer as Wales experienced prolonged spells of warm sunny weather. The main reason why performance has not been even better is because of uncertainty over the economy and disposable income (discussed in more detail under Q3).

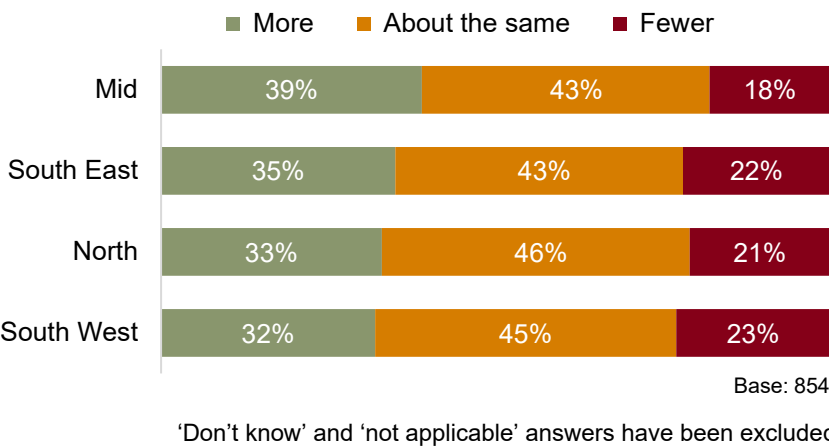
"We've had so many phone calls this summer that we could have sold the units three times over."
Caravan park, north

"We have had the best August on record"
Attraction, north

"I thought business was going to be great this year with the heatwave but it's not the case. People just don't have money."
Attraction, south east

Performance by region

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



Consistency across the regions

All four regions of Wales report being up on balance. There are no significant differences between them.

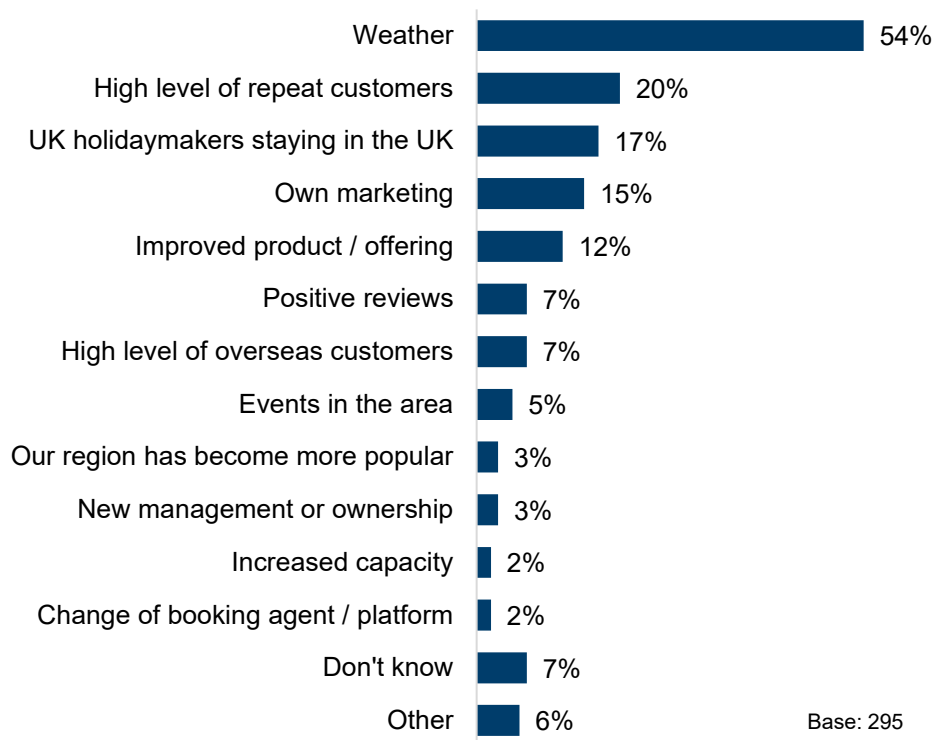
“It has been the best year that we have had”
Attraction, north

“The weather has been great; made it busier”
Serviced, south east

We discuss the reasons for being busier or quieter next.

Reasons for being busier

Figure 3: Q2 "Are there any particular reasons why you 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 helped many businesses

Summer 2026 (June to August) was provisionally the warmest summer on record in the UK according to the [Met Office](#), with many days above 30 degrees and very little rainfall until towards the end of August.

The fine weather helped to attract last minute bookings from UK holidaymakers. The weather has been of particular benefit to activity providers (79% of those citing more visitors state it as a reason) and the caravan & camping sector (74%). The rising cost of living is also felt to be a reason for UK holidaymakers not going abroad.

“The cost of living crisis meant that more people were trying out local experiences and we were offering more this year, so we were busier”
Activity provider, south east

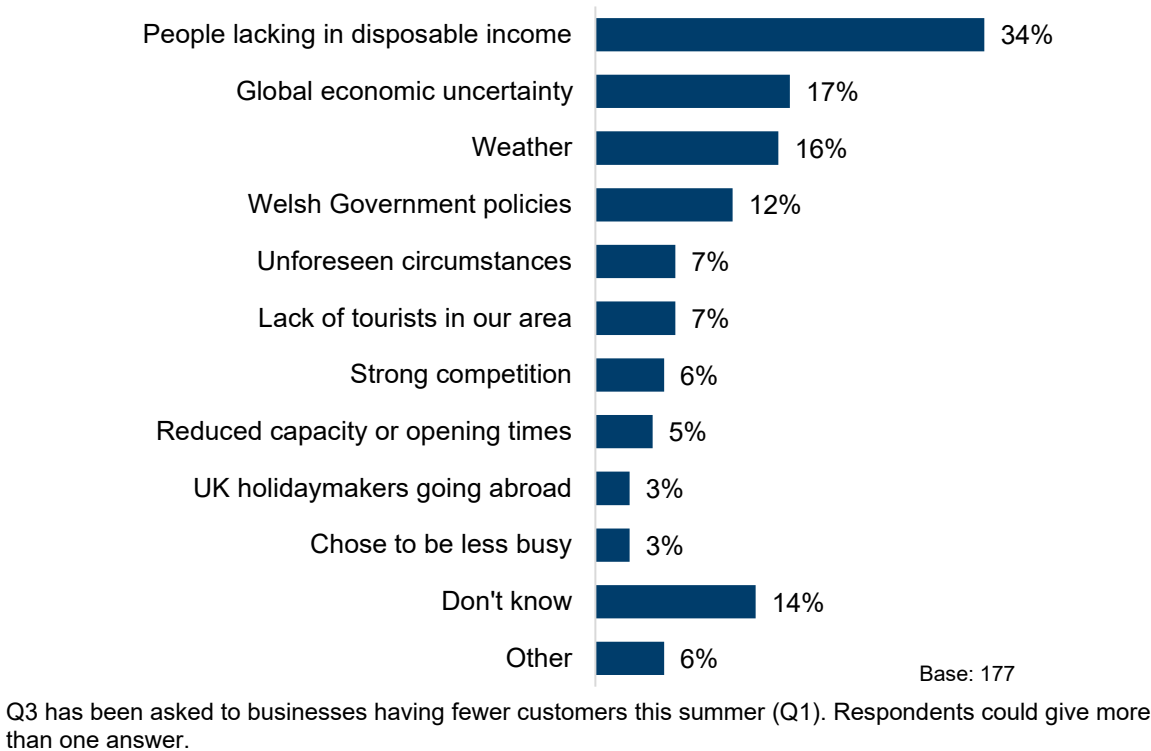
Own marketing and investment

Promoting the business and investing in the offering can bring rewards.

“Visit Wales showed us how to promote with social media last year. One of our reels had a million views so we have been inundated”
Serviced, north

Reasons for being quieter

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



Uncertainty over disposable income

Not all businesses have enjoyed a busy summer, and their most frequently cited reason (unprompted) is ‘people lacking in disposable income’, which is closely linked to ‘global economic uncertainty’.

“People can't afford to go on holiday like they used to. We're not confident going forward. There are fewer UK guests able to afford things due to the state of everything.”
Serviced, south east

Weather not necessarily ‘good’ for all businesses at all times

Whilst some businesses have reaped the rewards of a warm sunny summer, the weather at times was ‘too good’ for businesses inland or indoors as tourists headed to the beaches.

“We were significantly down on last year: around 20%. The weather was good and the beach is a cheap day out.”
Activity provider, south east

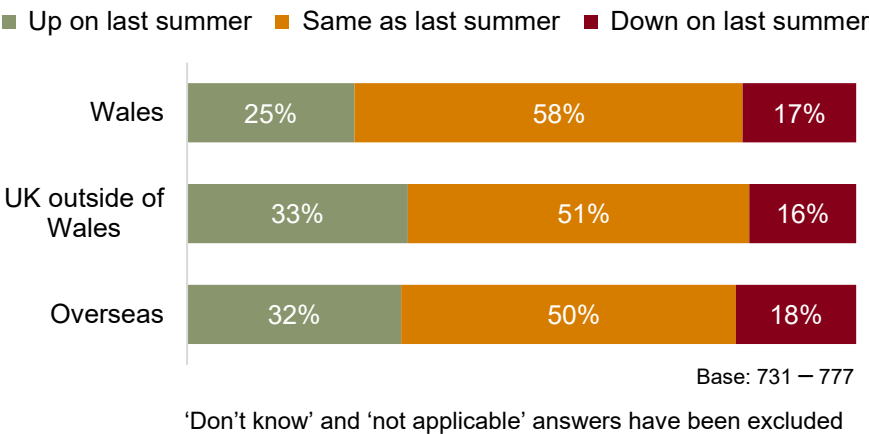
Also, the heatwaves at times made it unpleasant to be outdoors with no shade and so the performance of tourism businesses has depended partly on the suitability of their set-up for the weather conditions.

Close to half (45%) of attractions and 30% of businesses in south east Wales with decreased visitor levels attribute their decline to the weather. South east Wales experienced some particularly hot spells.

“We have been quieter because of the heatwave”
Attraction, south west

Performance by market

Figure 5: Q4 "How many customers have you had this summer compared to last summer from each of the following markets?"



Upturn in UK and overseas markets

All three geographical markets have performed well this summer, particularly UK (outside Wales) and overseas.

Open comments show that booking behaviour is becoming increasingly last minute. Many UK holidaymakers have opted to remain in the UK this year. Lack of disposable income is felt to be one of the reasons, and there is some perception that extreme summer heat in mainland Europe could also be playing a part. Whilst operators are not claiming that climate change is a good thing on the whole, one of the future consequences could be that tourists avoid southern Europe in peak summer in favour of cooler climates.

“Climate change may help the self-catering industry in Britain [sic]. Fewer people are going abroad.”
Self-catering, south west

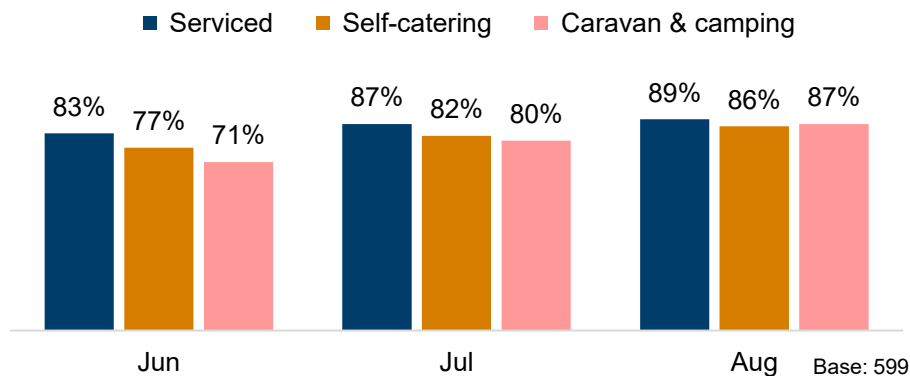
Overseas visitors are returning to Wales, especially from nearby Europe.

“We have had far more Dutch and French visitors this year”
Serviced, mid

“We have had a lot of Germans this year”
Attraction, south west

June to August occupancy levels

Figure 6: Q6 "How much of your available capacity was booked for ... ?" (accommodation operators)



Q6 has been asked to accommodation operators. 'Don't know' and 'closed all month' answers have been excluded. Occupancy levels shown have been weighted by size of business.

Healthy occupancy levels but changing trends

Summer net occupancy rates in all three accommodation sectors shown above peaked in August and were significantly higher than last year in self-catering. Operators in all sectors also report that there is a significant trend towards shorter stays, booked last minute.

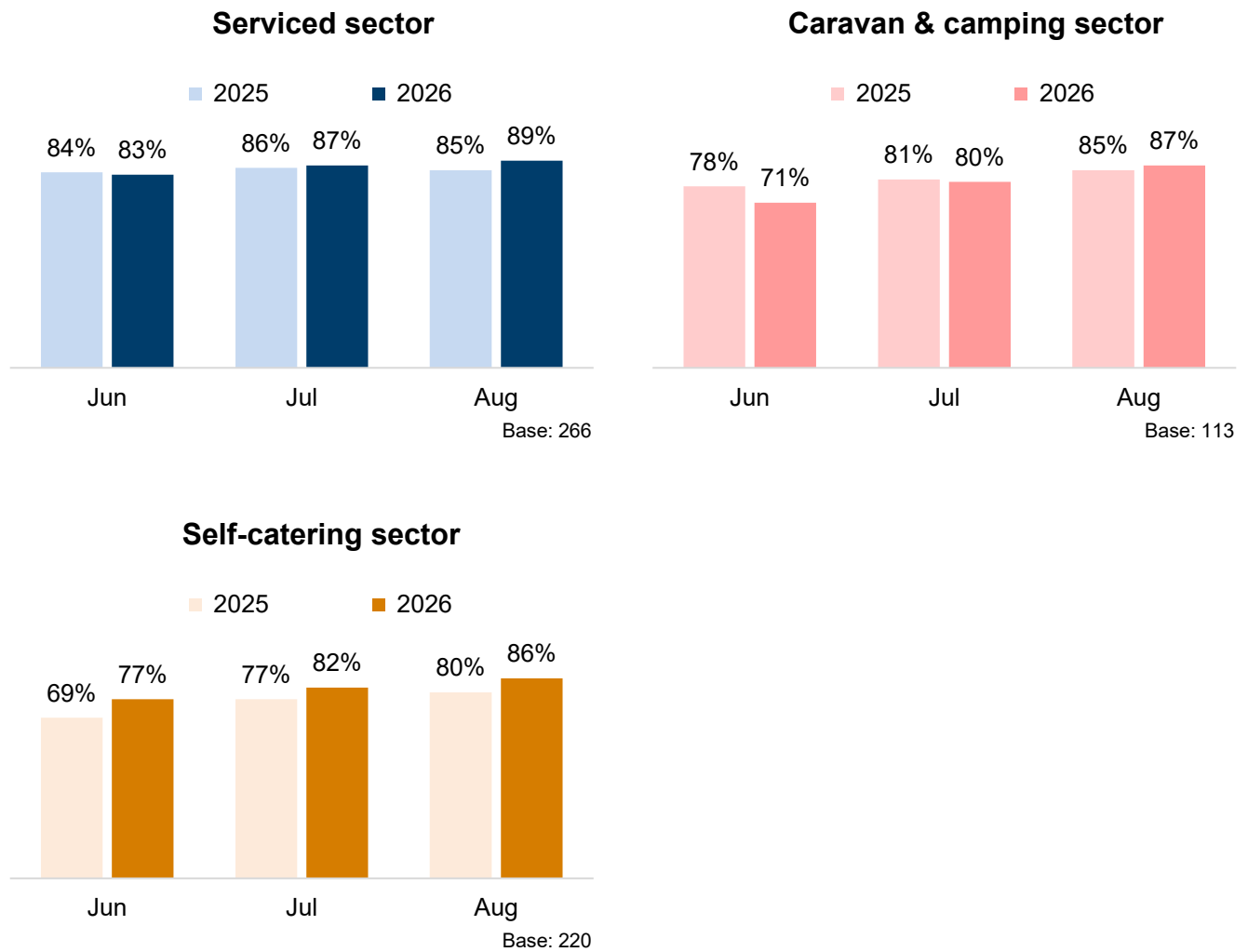
"The pattern of bookings has completely changed. We used to get people coming for holidays, for a week or two or sometimes three. Now, people want short breaks and expect availability at peak times."
Caravan park, south east

"We have noticed that nobody books in advance anymore. It's all last minute bookings."
Serviced, north

"We started up 60 years ago and are still going in our 80s. The days of people booking for a week or two are long gone. People come and go every day of the week."
Self-catering, north

The charts below show year-on-year differences in sector occupancy:

Figure 7: net occupancy year-on-year comparison



Remaining under pressure to reach 182 days in self-catering

Whilst self-catering operators’ occupancy figures appear to show that the sector is performing well, many point out the pressure they are under to meet the 182 day occupancy target in order to qualify for non-domestic rates. In some cases this means they are sacrificing price in favour of occupancy. They feel that they have to be as full as possible during the summer months because there is only limited perceived opportunity to attract bookings outside of peak season.

“We’re in a seaside village which thrives in summer and is dead in winter. The occupancy threshold has to have allowance for seasonality.”
Self-catering, mid

“The 182 day threshold is unachievable for us: we usually get around 140. It needs to be lowered considerably.”
Self-catering, south west

“The 182 days are an issue as we have had to reduce our prices”
Self-catering, mid

Differences by region

Table 2: net occupancy by sector and region, June to August

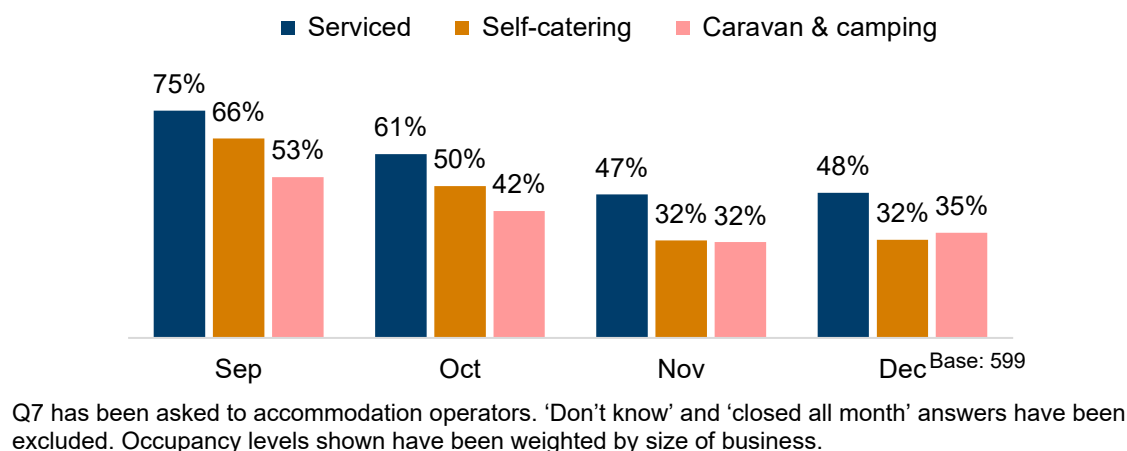
Sector / Region	North	Mid	South West	South East	All Wales
Serviced	87%	80%	90%	85%	86%
Self-catering	80%	83%	84%	76%	82%
Caravan & camping	82%	82%	75%	81%	79%

All regions of Wales have enjoyed high occupancy rates this summer.

4. Advance bookings and confidence

Advance bookings

Figure 8: Q7 "How much of your available capacity is booked for ... ?"



Outlook for the autumn and winter

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

"We have nothing booked in October yet but as we attract a lot of coastal walkers, people tend to wait to see what the weather is doing"
Self-catering, south east

"October and November are always last minute bookings"
Self-catering, mid

Differences by region

Table 3: booked occupancy by sector and region, October to December

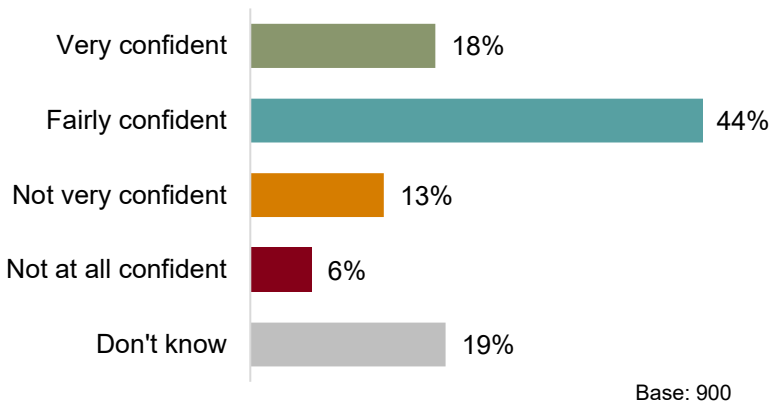
Sector / Region	North	Mid	South West	South East	All Wales
Serviced	50%	32%	43%	75%	52%
Self-catering	30%	41%	50%	23%	38%

The sample size of open caravan / campsites is too small for reliable regional comparisons

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 9: Q8 "How confident do you feel about running the business profitably this year?"



Consistent levels of confidence across all sectors and regions

The majority (62%) of operators feel confident about running their business profitably this year. This proportion does not vary significantly by sector or region.

"It has been the best year that we have had"
Attraction, north

Rising costs causing concerns for some

Where operators are not confident about operating profitably or do not know if they can, rising costs are a significant challenge.

"Business rates are going up and all I seem to be doing is working hard and spending money for others to enjoy their luxury holidays whilst I can't have holidays with my own kids"
Caravan park, mid

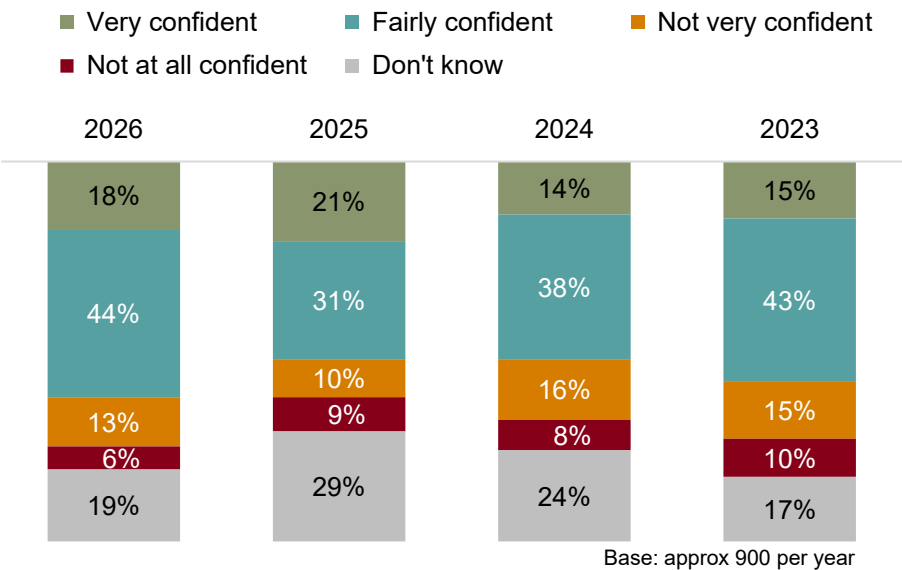
Among self-catering operators, there are significant concerns about meeting the 182 days occupancy target. Reducing rates to meet it can boost visitor levels but at the expense of operating profitably.

"If we cannot hit 182 nights out of the year then we will be operating at a loss"
Self-catering, mid

"Costs are going up: heating, food, cleaner, gardener, electricity, petrol, minimum wage, but we are having to lower how much we charge per night"
Self-catering, north

Confidence trend

Figure 10: "How confident do you feel about running the business profitably this year?"
(trend by year)



The same question has been asked in September in each year shown

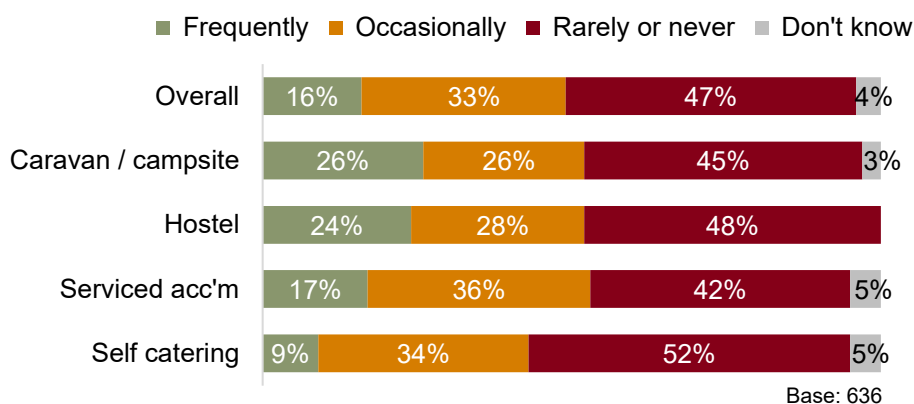
Increase in confidence

Good summer performance has helped to increase confidence this year. Last year's confidence levels were hampered significantly by the rising cost of living. Whilst this is still affecting bookings, confidence among consumers and businesses seems to be gradually returning.

5. Cycling tourism

Receiving guests who cycle

Figure 11: Q9 "How often do you receive guests who cycle whilst staying in your area?"



Q9 has been asked to accommodation providers

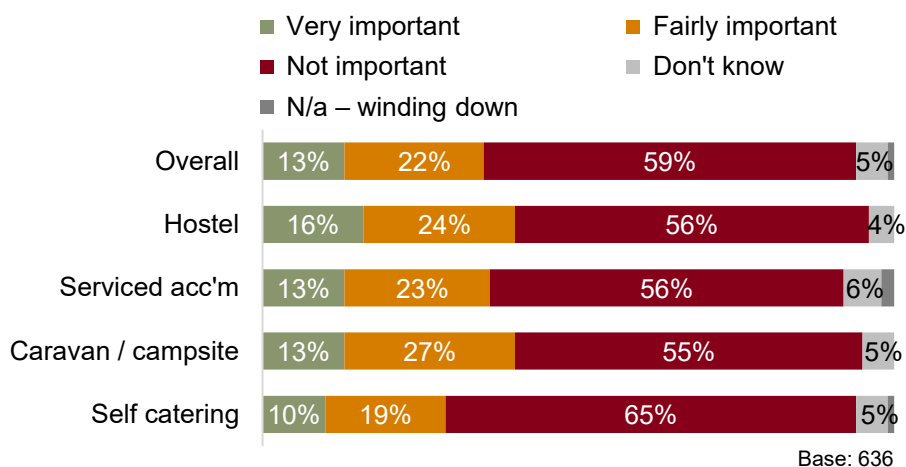
Mixed levels of receiving cycling guests

About half of accommodation operators to some degree of frequency receive guests who cycle. This is more frequent among the generally less expensive forms of accommodation, i.e. hostels and campsites. Answers do not vary significantly by region.

"We had a whole cycling team stay this summer as there was a cycling event in the area"
Campsite, mid

Importance of cycling tourism

Figure 12: Q10 "How important is cycling tourism to the future of your business?"



Q10 has been asked to accommodation providers

Important to some

The future level of importance of cycling tourism varies greatly among businesses; it is important to around a third. The perceived importance is lower among self-catering businesses than in other sectors.

“We cater very well for cyclists and have a dedicated shed, which bodes well for next year”

Serviced, north

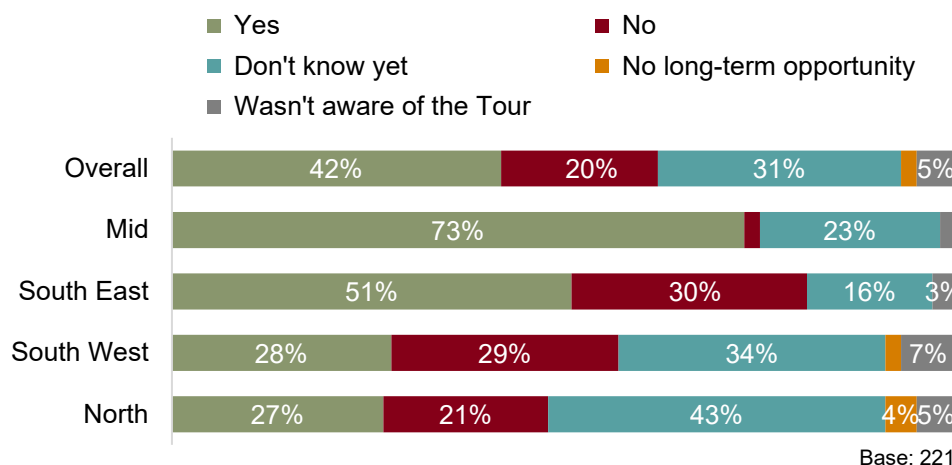
The proportion perceiving cycling tourism to be ‘very important’ is higher in south east Wales (19%) than in the rest of Wales (11%).

“We don't welcome cyclists as they only book for one night”

Serviced, mid

Long-term opportunities from hosting Tour de France

Figure 13: Q11 “Wales is hosting a stage of the Tour de France next summer. Do you plan to take advantage of the long-term opportunity brought by the Tour raising the profile of cycling in Wales?”



Q11 has been asked to those answering that cycling tourism is ‘very’ or ‘fairly’ important to the future of their business in Q10

Significant differences by region

The Wales-hosted stage of the Tour de France will start in Welshpool (mid Wales) and finish in Cardiff. As well as there being business opportunities whilst the Tour is in Wales, there is also a long-term opportunity to raise the profile of cycling in Wales.

Among businesses who consider cycling tourism to be important to their future, about two in five (42%) intend to take advantage of this long-term opportunity and a further 31% don't know yet.

“We don't have cyclists staying but would love it if they did. We are actually on the Tour de France route so you have put that in our heads!”

Self-catering, mid

Answers vary significantly by region, with stronger intentions seen in the regions that the Tour passes through (mid and south east Wales).

Some concerns about business around the time of the event

Some businesses close to the route are concerned about the loss of business they expect to experience when the Tour comes due to disrupted access.

“The Tour de France could be good for accommodation and restaurants in the area but bad for us. We have a shop but all the roads will be closed, so no business for us that day.”

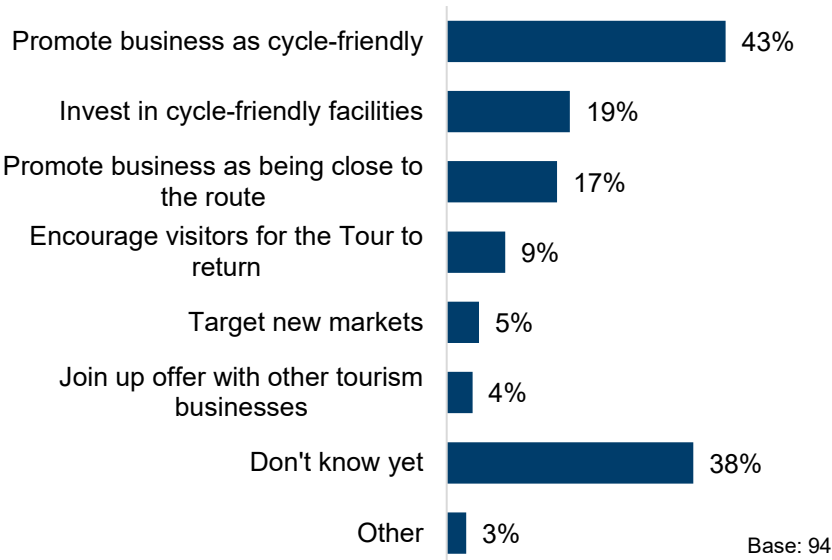
Caravan park, mid

“There was a ladies’ cycle race here and it caused havoc. Parts of the roads were closed and it was of no benefit to the local economy.”

Self-catering, mid

Plans to take opportunities

Figure 14: Q12 “How are you planning to take advantage of the long-term opportunity?” (unprompted)



Q12 has been asked to those planning to take advantage of the long-term opportunity ('yes' to Q11). Respondents could give more than one answer.

Promoting being cycle-friendly

Operators who already know how they are going to take advantage of the opportunity see a range of possibilities, most commonly by promoting their business as cycle-friendly.

“Cyclists stay and we also hire bikes, including accessibility bikes. We plan to host an event next year alongside the Tour de France”

Caravan park, south west

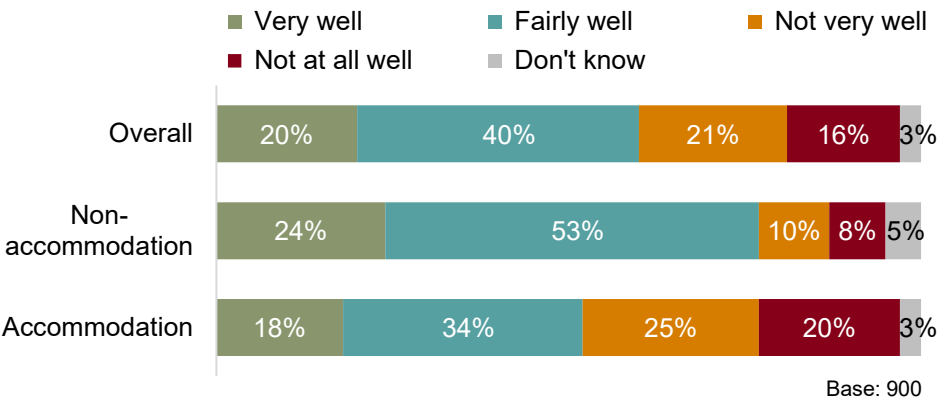
Many don't know what to do as they haven't yet thought this far ahead.

"We are going to have to put our thinking caps on regarding the Tour de France as we are near the course"
Caravan park, south east

6. Accessibility needs

Servicing customers with accessibility needs

Figure 15: Q13 “How well do you feel your business is set up for customers with accessibility needs? Examples of accessibility needs include visual, hearing, mobility and cognitive.”



Perceived adequacy of provision varies by broad sector

Three in five (60%) operators feel that their business is currently well set up for customers with accessibility needs. Perceived level of provision is better among non-accommodation operators. Perceived adequacy is also higher in south east Wales (73% of operators feel well set up) than in the rest of Wales (57%).

“There are companies that specialise in accessibility. Those that want to do kayaking, for example, will find a way.”
Activity provider, south west

“We've started giving out free wheelchairs for people to access the beach.”
Café, north

“We can cater for people with specific needs but a level of mobility is needed for the activities we offer”
Activity provider, south west

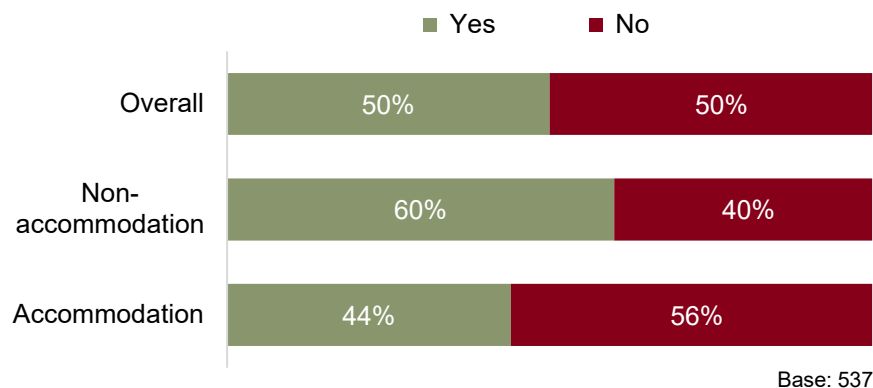
The issue among many accommodation operators is that they do not know how they could make their building more accessible for guests with mobility needs.

“We are a listed building, so we're restricted in making changes for wheelchairs [sic]”
Serviced, south west

“The lady in our local tourist information centre was telling me that there's a real need for more accessible accommodation in our area. I had to turn away three nights last week as our rooms are upstairs. We're thinking of moving upstairs ourselves, as our living area is accessible.”
Serviced, north

Promoting accessibility provision

Figure 16: Q14 “Do you actively promote your business as being well set up for customers with accessibility needs and what you can provide for them?”



Q14 has been asked to those answering their business is 'very well' or 'fairly well' set up for customers with accessibility needs in Q13

Proactivity split 50/50

Half of operators who feel well set up to service accessibility needs promote their business as such, but the other half do not. Non-accommodation operators, as well as being more likely to feel well set up, are also more likely to be proactive in promotion. Answers do not vary significantly by region.

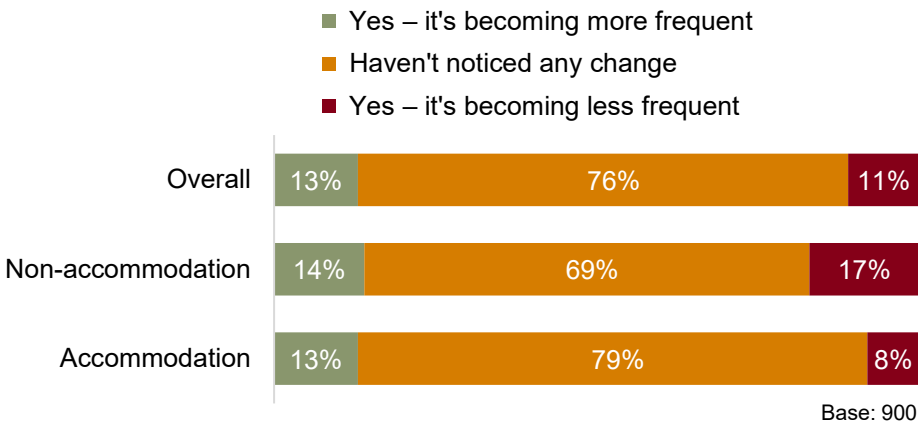
“We have members of staff with disabilities, including me, the manager. We have regular groups that meet here weekly: neurodiverse groups, stroke survivors etc because we cater well for them all.”
Pub, mid

“Pembrokeshire is not set up well for accessibility. I appreciate the coastal path is why people visit, but it would be good to have more areas where I could tell guests in wheelchairs to park [sic] and visit viewpoints.”
Self-catering, south west

“We can do easier hikes for people with accessibility needs but there are companies in the area who specialise in this and capture the market”
Activity provider, mid

Changes in frequency of accessibility enquiries

Figure 17: Q15 “Are you noticing any change in the frequency of customers or potential customers enquiring about accessibility needs and what you can provide?”



Not much change being noticed

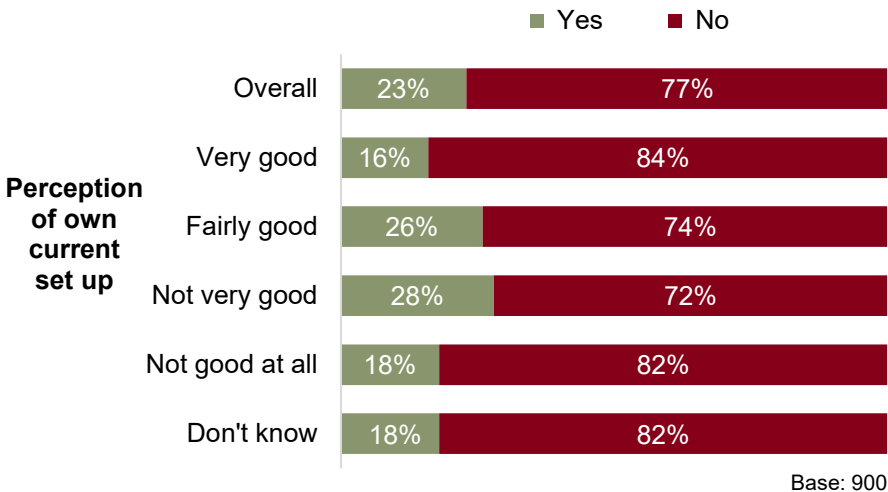
About three quarters (76%) of businesses haven't noticed any change in the frequency of accessibility enquiries. Among those who have, there is a balance between those saying enquiries are becoming more frequent and those noticing enquiries becoming less frequent.

“Our 2 bedroom cottage is adapted for the disabled [sic] but not many stay”
Self-catering, south east

“We've had people with dementia enquiring about mountain biking. They remember how to ride but have additional needs. We've also done some social prescribing work: we have a programme with 10 e-bikes.”
Activity provider, mid

Interest in receiving advice

Figure 18: Q16 “Are you interested in receiving advice from Visit Wales on how your business could become more accessible?”



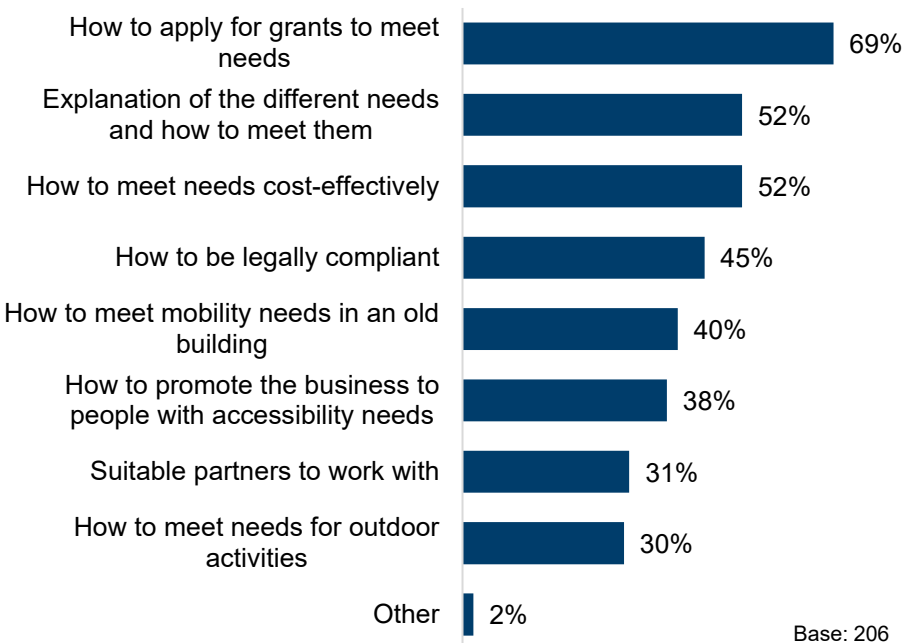
Interest in receiving advice correlates with current provision

Some (23%) operators are interested in receiving advice from Visit Wales on how to become more accessible. Interest peaks among those feeling ‘fairly well’ to ‘not very well’ set up currently. There is less interest among those at the more extreme ends of the scale of feeling ‘very well’ or ‘not at all well’ set up. Answers do not vary significantly by region.

“We would like to improve our business and make it more accessible for people with a disability [sic]”
Serviced, mid

Advice sought

Figure 19: Q17 “What type of advice would be helpful?” (prompt if necessary)



Q17 has been asked to those interested in receiving advice in Q16

A range of advice could help

Improving accessibility provision often comes down to financing the changes, and many of those seeking advice would like help with how to apply for grants or meet needs cost-effectively.

“We want to apply for a grant to replace the front doors as they are not safe for wheelchair users or prams”
Serviced, north

“We do have an accessible shower and toilet but would like to look into financing a whole unit”
Caravan park, mid

Some operators don’t really know where to start and would appreciate being told about the range of possible needs and how to meet them.

Owning an old property which is not naturally set up for mobility needs or in accessible surroundings is often a barrier for trying to make improvements, but some operators would appreciate learning about if there is anything they could do.

“We have three shepherd huts. There are steps going down to them. We would like information on how to be more accessible.”

Campsite, south west