

Wales Tourism Performance Report : January to March 2018

7 March 2019
SFR 69/2018 (R)

This report is a revision to the previously published edition to include revised results for the Great Britain Tourism Survey (GBTS) 2018 data due to an error in the data provided by the contractor.

This report presents the results from the main official tourism surveys for Wales covering the period January to March 2018. Data is reported for the combined 3 months from January to March 2018 as well as totals for the 12 months ending March 2018. The reported surveys are all sample surveys and the results subject to normal sampling errors. Sample errors will be larger for the 3 monthly estimates as they are based on smaller samples and for this reason, results relating to just the 3 month period should be treated with caution.

The report includes data from the following surveys:

Great Britain Tourism Survey

A continuous survey of the GB population that is the source of official statistics measuring the volume and value of overnight trips taken by British residents throughout Britain.

Great Britain Day Visits Survey

A continuous survey of the GB population that is the source of official statistics measuring the volume and value of tourism day trips taken by British residents throughout Britain.

International Passenger Survey

A survey undertaken by the Office for National Statistics that collects information about overseas passengers entering and leaving the UK and is the main source of statistics on the volume and value of international visits to Wales.

Wales Tourism Accommodation Occupancy Survey

A survey of a sample of tourism businesses in Wales that is the source of official statistics on occupancy rates and other performance measures for different types of accommodation used by visitors to Wales.

Wales Tourism Industry Barometer

A survey of a sample of tourism businesses in Wales that has been set up to provide 'snapshots' of industry performance after important points in the tourism calendar.

About this release

This is a new comprehensive report that includes the most recent quarterly data from the main tourism surveys covering overnight domestic GB trips, international visitors, day visits by GB residents, Accommodation Occupancy rates and findings from the Wales Tourism Barometer. The aim of this report is to present the results from the individual surveys on the overall performance of the tourism industry in Wales. The report includes data for the whole of Wales and, where available, for Great Britain/UK for comparative purposes.

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Main points

Overnight visits by GB residents

The results in this section have been revised as a result of the correction to GBTS data

- There were increases in visits to Wales in the first 3 months of 2018 compared with 2017: +6.4 per cent to 1.633 million in terms of trips and +40.4 per cent to £299 million in related spend. The corresponding figures at GB level are +13.9 per cent and +18.3 per cent respectively.
- Over the 12 months ending March 2018, there were 9.121 million overnight trips to Wales, down by -2.8 per cent compared with the 12 months ending in March 2017, although expenditure at £1,741 million was up by 2.5 per cent.

International visitors

- We do not yet have figures for international visits to Wales for the first quarter of 2018. Provisional results from the International Passenger Survey covering the period January to March 2018 are due to be published by Office for National Statistics in September 2018.

Day visits

- In the first 3 months of 2018, there were 19.865 million day visits to destinations in Wales, up 1 per cent on the first quarter of 2017. Related spend (£1,123 million) was up by 11 per cent. The corresponding figures at GB level were -4.8 per cent on trips and +1.2 per cent in terms of spend.
- In the 12 months ending in March 2018, day trips to Wales (99.9 million) were down by 5 per cent but related spend (£4,441 million) was 2 per cent up. The corresponding figures at GB level showed decreases on both dimensions: -3 per cent on trips and -2 per cent on related spend.

Accommodation occupancy

- Average monthly occupancy rates compared with the first quarter of 2017 are level at Hotels and Hostels but 2 percentage points down at Guest Houses/B&Bs and 4 points down for Self-catering.

Industry performance

- Wave 2 of the Tourism Barometer, undertaken following the May/June half term in 2018, indicates that 80 per cent of businesses reported a greater (33 per cent of businesses) or equal (47 per cent of businesses) level of visitors compared with the corresponding period in 2017.
- 87 per cent of businesses expressed confidence for the season ahead, 49 per cent being 'very confident' and a further 38 per cent 'fairly confident'.

Overnight visits by GB residents

The results in this section have been revised as a result of the correction to GBTS data

All purposes of trip

Table 1.0 Volume (millions) and Value (£ millions) of Overnight Domestic GB Visitors All Purposes of Trip				
Trips taken in Wales				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018	% change from year before
Trips	1.633	+6.4	9.121	-2.8
Nights	4.326	+10.1	31.377	-4.8
Spend (£)	£299	+40.4	£1,714	+2.5
Trips taken in Great Britain				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	24.206	+13.9	123.639	+5.5
Nights	65.506	+24.4	382.295	+8.7
Spend (£)	£4,412	+18.3	£24,364	+6.8

In the 12 months ending March 2018, there were 9.12 million overnight trips to Wales by GB residents, which is a small decrease on the total for the previous 12 months of 9.38 million trips. For the 12 months ending March 2018, there was a total expenditure of £1,714 million, an increase of +2.5 per cent compared to the 12 months ending March 2017.

The level of trips and spend in Wales have both grown during the first three months of 2018. The higher volume of trips during this period is partly attributable to the earlier start of the Easter holidays falling in March in 2018.

Figure 1.0 shows that trips and spend to Wales peaked in 2015 with around 10.5 million annual trips and £1,975 million in expenditure. There was a fall in trips taken in Wales during 2016 which continued into 2017 driven by a range of factors including fewer visitors during the summer period in 2017 and fewer visits by Welsh residents. The first quarter of 2018 show an increase in visitor numbers and related expenditure.

In comparison, the volume of overnight trips taken across GB as a whole and related expenditure have shown higher levels of growth in the last 12 months with trip volumes reaching 123.6 million in the 12 months ending March 2017, which is around 5 per cent higher than the previous 12 months, but still below the peak levels of 126 million trips in 2012.

Figure 1.0: Trends in Overnight Trips and Expenditure in Wales by GB Residents

Source GBTS: 12 month rolling totals

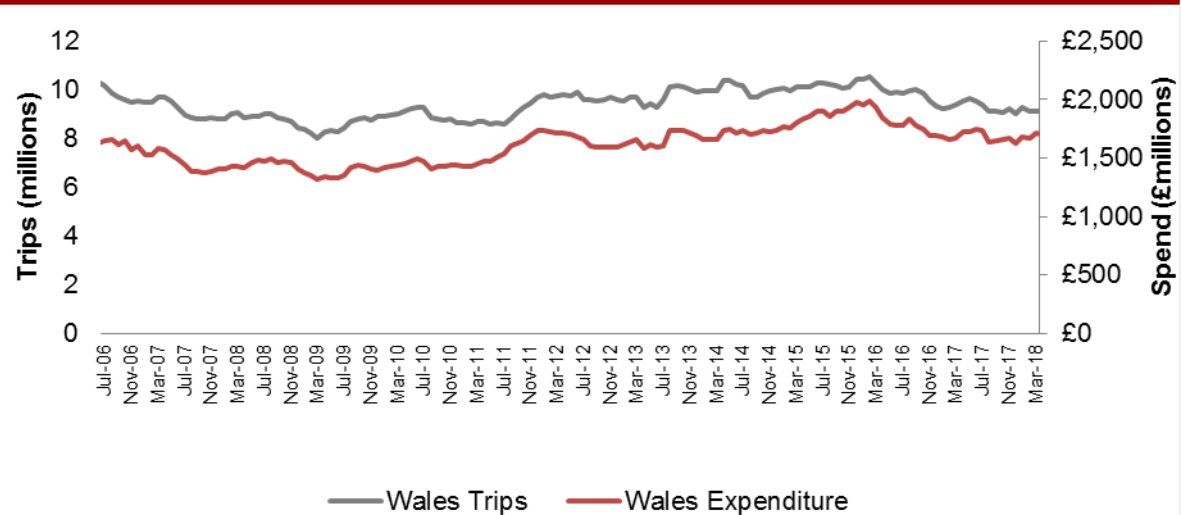
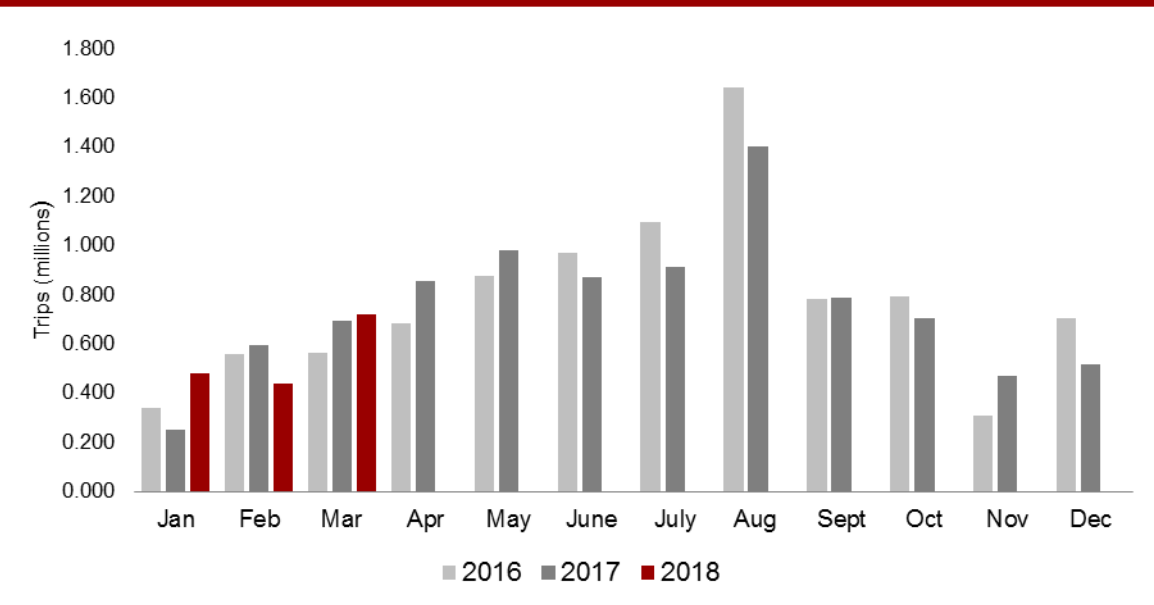


Figure 1.1: Volume of Overnight Trips Taken by GB Residents in Wales

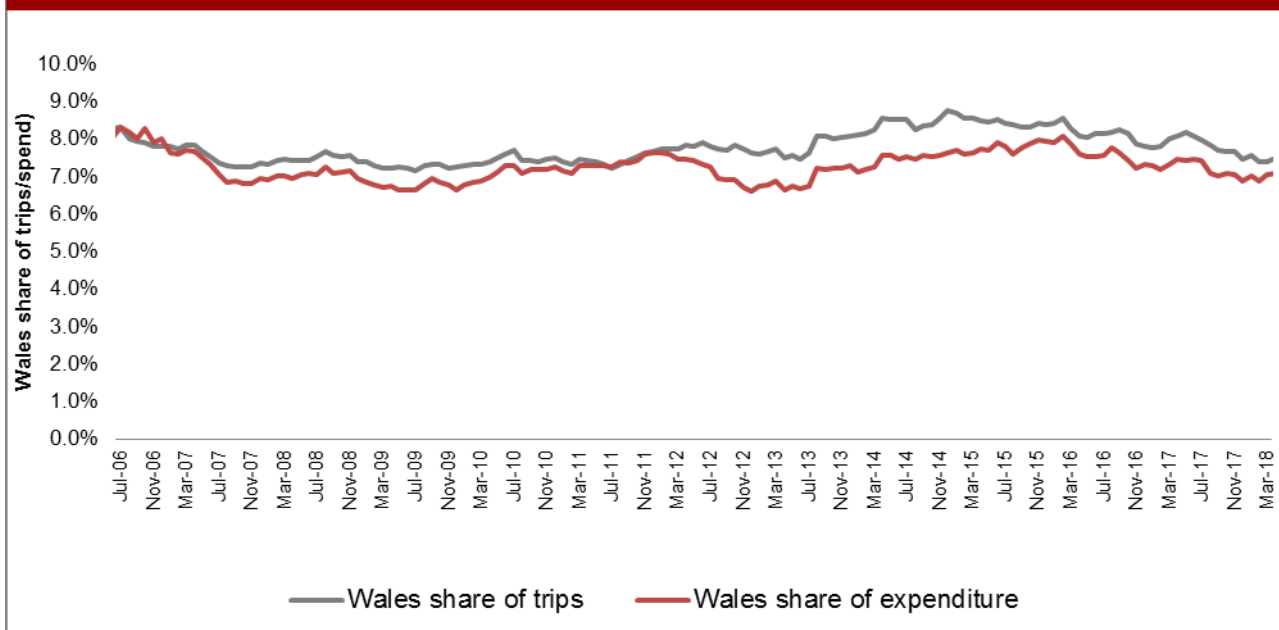
Source Great Britain Tourism Survey



Wales share of trips and spend

Figure 1.2 shows that Wales' share of overnight trips (any purpose) taken by GB residents fell in the 12 months ending March 2018 to 7.4 per cent compared to 8.0 per cent for the 12 months ending March 2017. The share of spend has also fallen slightly to 7.0 per cent compared to 7.3 per cent for the 12 months ending March 2017.

Figure 1.2: Wales share of overnight trips and expenditure by GB Residents
Source: GBTS rolling 12 month average share



Overnight holidays

Table 1.1 Volume (millions) and Value (£ millions) of Overnight Domestic GB Visitors Trips for holiday purposes

Holiday Trips taken in Wales				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	0.807	+1.3	5.722	+0.6
Nights	2.324	+6.3	21.104	-7.0
Spend (£)	£167	+19.3	£1,230	+0.7
Holiday Trips taken in Great Britain				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	9.479	+10.6	60.061	+8.5
Nights	25.81	+17.2	206.113	+9.6
Spend (£)	£2,097	+12.6	£14,366	+7.9

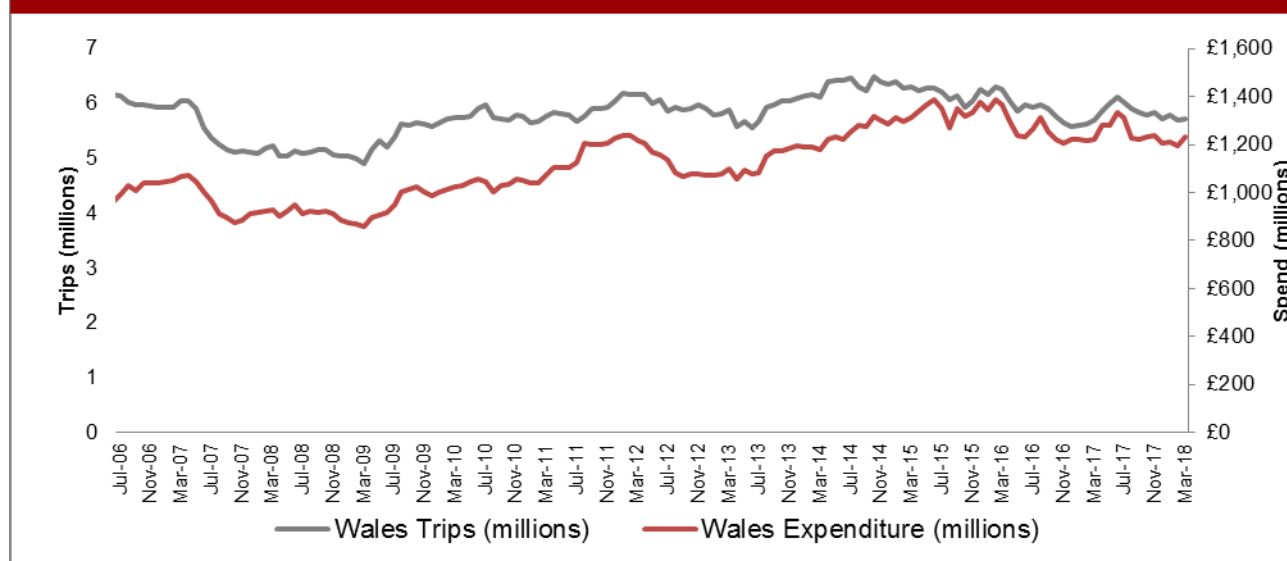
In the 12 months ending March 2018, there were a total of 5.722 million overnight holiday trips to Wales by GB residents which is a slight increase of 0.6 per cent on the total for the previous 12 months of 5.686 million trips. For the 12 months ending March 2018, there was a related expenditure of £1,230 million, an increase of +0.7 per cent compared to the 12 months ending March 2017.

The volume of trips and spend in Wales have both grown during the first three months of 2018. The higher volume of holiday trips during this period is partly attributable to the start of the Easter holidays falling in March in 2018.

Figure 1.3 shows that holiday trips taken in Wales peaked in 2014 with around 6.4 million annual trips. There was a fall in the volume of holiday trips taken in Wales during 2016 and 2017.

In comparison, the volume of overnight trips taken across GB as a whole have shown higher levels of growth in the last 12 months with trip volumes reaching above 60 million in the 12 months up to March 2018, a record level of trips and spending on domestic overnight holidays by GB residents.

Figure 1.3: Volume of Trips and Expenditure on Holidays in Wales by GB Residents
Source GBTS: Rolling 12 month totals



Visits to friends and relatives

Table 1.2 Volume (millions) and Value (£ millions) of Overnight Domestic GB Visitors Visits to Friends & Relatives (VFR)

VFR Trips taken in Wales				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	0.519	-5.8	2.335	-12.5
Nights	1.463	+11.0	7.053	+2.2
Spend (£)	£71	+77.5	£263	-1.5
VFR Trips taken in Great Britain				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	9.859	+17.9	43.302	+4.6
Nights	28.508	+41.9	127.649	+13.1
Spend (£)	£1,031	+22.7	£4,843	+5.1

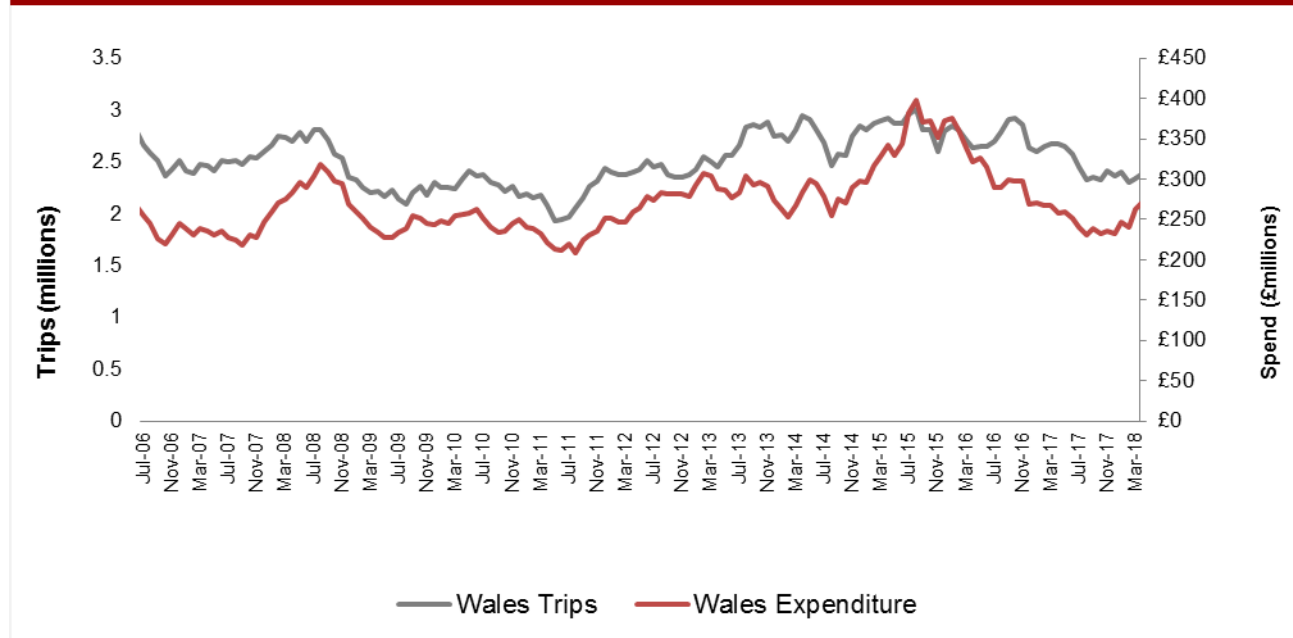
In the 12 months ending March 2018, there were a total of 2.3 million overnight visits to friends and relatives in Wales by GB residents which is a fall of 12.5 per cent on the total for the previous 12 months of 2.67 million trips. For the 12 months ending March 2018, there was a related expenditure of £263 million, a decrease of -1.5 per cent compared to the 12 months ending March 2017. There was a small decrease in the volume of trips during the first three months of 2018.

Figure 1.4 shows that trips to visit friends and relatives in Wales have fluctuated over time but there was a peak in 2015 with around 3 million annual trips followed by a fall in the volume of VFR trips taken in Wales during 2016 and 2017.

In comparison, there has been a longer term fall in the volume of overnight visits to friends and relatives taken across Great Britain as a whole. There has been a steady fall in the volume of trips from over 48 million annual trips in 2006 to the current volume of 43.3 million trips taken in the 12 months up to March 2018. The fall in visits to friend and relatives has been driven by fewer trips for non holiday-related purposes.

Figure 1.4: Volume of Trips and Expenditure on Overnight Visits to Friends & Relatives in Wales by GB Residents

Source GBTS: 12 month rolling totals



Business visits

Table 1.2 Volume (millions) and value (£ millions) of overnight domestic GB visitors business visits

Business visits taken in Wales				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	0.282	+122.0	0.778	+9.6
Nights	0.482	+139.8	1.808	-6.2
Spend (£)	£59	+168.2	£174	+38.1
Business Visits taken in Great Britain				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	4.082	+16.9	17.12	+6.4
Nights	8.345	-0.8	37.908	+1.2
Spend (£)	£1,130	+29.1	£4,499	+7.4x`

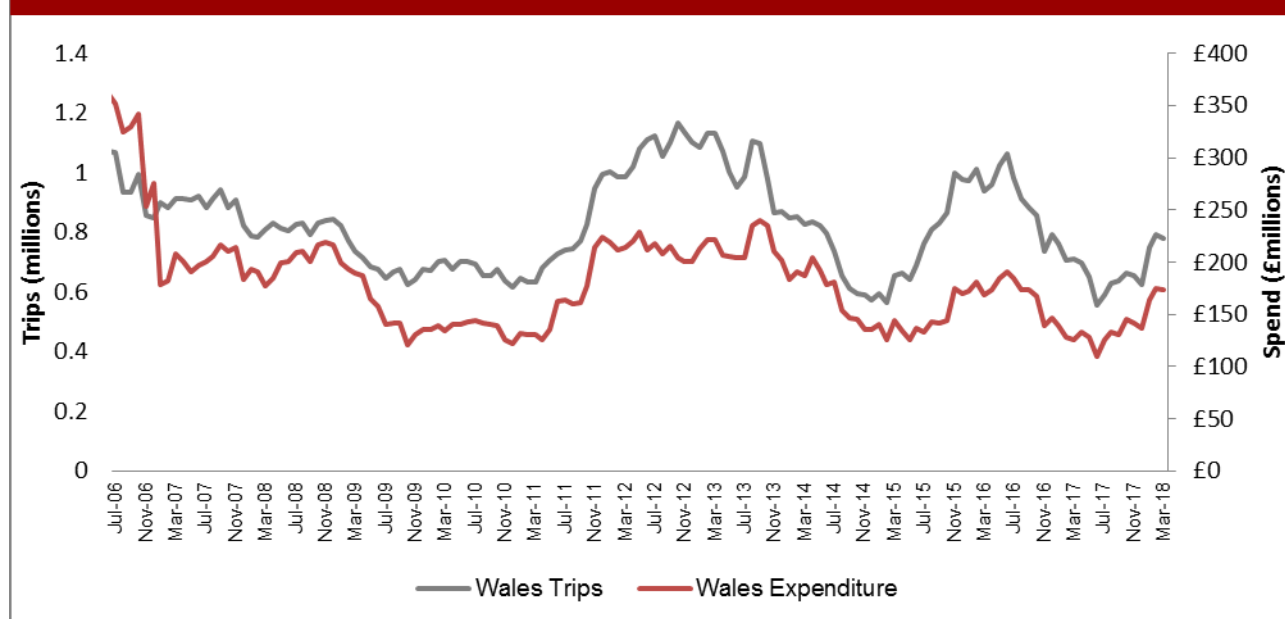
In the 12 months ending March 2018, there were a total of 0.778 million overnight business trips taken in Wales by GB residents which is an increase of 9.6 per cent on the total for the previous 12 months of 0.710 million trips. For the 12 months ending March 2018, there was a related increase in expenditure to £174 million, an increase of 38 per cent compared to the 12 months ending March 2017.

There was a notable increase in the volume of trips, nights and spend during the first three months of 2018, with trip levels well above average levels for this period.

Figure 1.5 shows that overnight business trips taken in Wales by GB residents have fluctuated over time but there was a peak in 2012 with over 1.1 million annual trips. Trip volumes also reached over 1 million in 2015 and early 2016 but since then trip volumes have fallen. However, the early indications for 2018 is a general increase in overnight business trips.

In comparison, there has been a longer term fall in the volume of business trips taken across Great Britain as a whole. There has been a steady fall in the volume of trips from over 18.6 million annual trips in 2006 to the current volume of 17.1 million trips taken in the 12 months ending March 2018. The fall in business trips has been driven by fewer routine business trips rather than trips to attend conferences and exhibitions.

Figure 1.5: Volume of Trips and Expenditure on Overnight Business trips to Wales by GB residents
Source GBTS rolling 12 month totals



Domestic GB tourism day visits

Table 1.3: Volume of Trips and Expenditure on Tourism Day Visits by GB residents

Tourism Day visits taken Wales				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	19.865	+1	99.9	-5
Spend (£)	1,123	+11	£4,441	+2
Tourism Day Visits taken in Great Britain				
	Jan to March 2018 (millions)	% change from year before	12 month total ending March 2018 (millions)	% change from year before
Trips	380.2	-4.8	1,774	-3
Spend (£)	13.913	+1.2	£62,615	-2.0

In the 12 months ending March 2018, there were a total of 99.9 million tourism day visits taken in Wales by GB residents which is a decrease of 5 per cent on the total for the previous 12 months of 104.6 million trips. For the 12 months ending March 2018, there was an expenditure of £4,441 million, an increase 2 per cent compared to the 12 months ending March 2017.

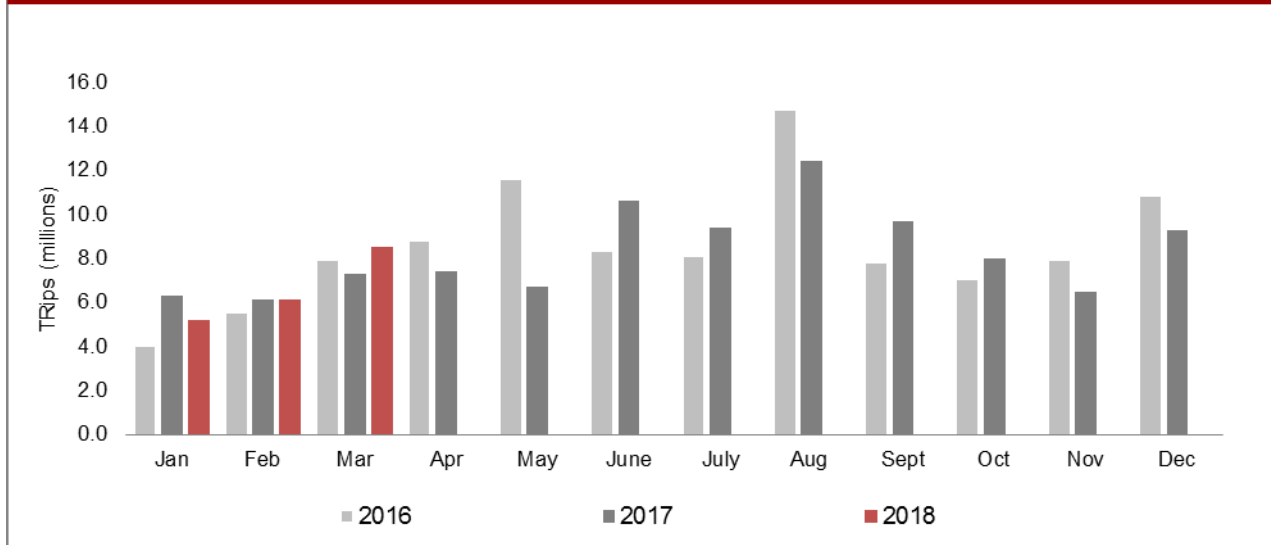
Figure 1.6 Volume of trips and spend on tourism day visits taken in Wales by GB residents. 12 month rolling total



Figure 1.6 shows that Tourism Day Visits taken in Wales by GB residents fell from a peak level of around 117 million annual trips in 2011 to 86 million trips in 2015. Trip volumes have increased over the last 2 years to their current level of around 100 million trips. Expenditure on tourism day visits taken in Wales has followed a similar pattern to the volume of visits with expenditure falling between 2011 and 2015. However, spend has been increasing at a faster rate than visits over the last couple of years with spend continuing to increase in the first 3 months of 2018. The higher spending has been driven by a higher spend per trip which was an average of £44.50 in the 12 months ending March 2018, compared to £35 for all Tourism Day Visits taken in Great Britain.

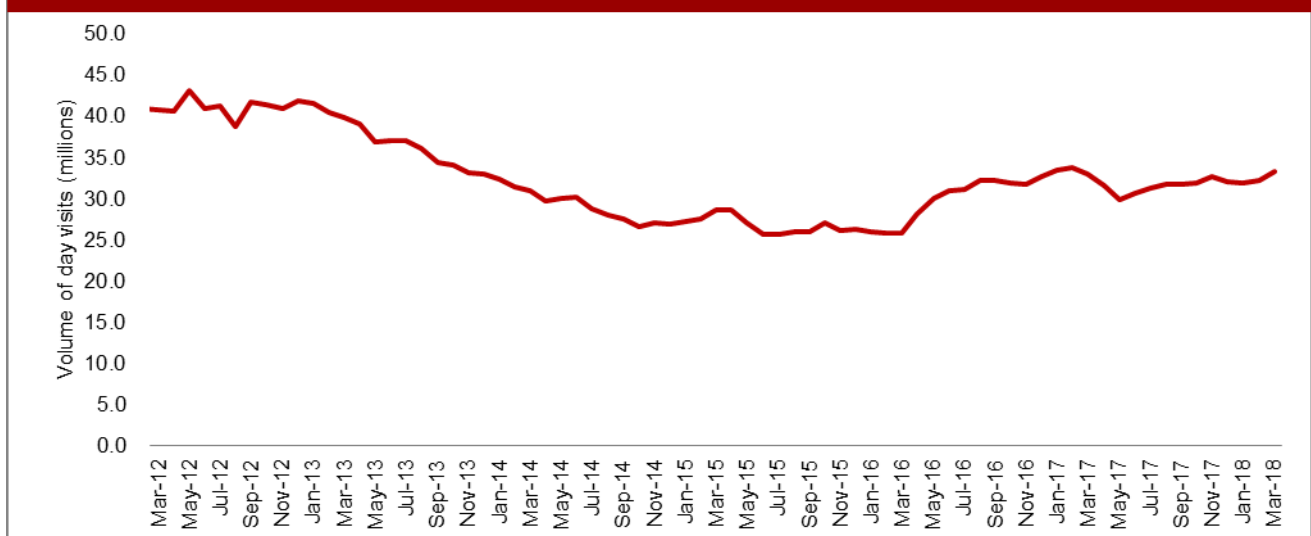
Tourism Day visits across Great Britain as a whole have also fallen from a peak level in 2012 of 1969 million annual trips to 1754 million annual trips in 2015. In line with the trend in Wales, tourism day visits taken across Great Britain have increased over the last 2 years to the current level of 1,774 million in the 12 months ending March 2018.

Figure 1.7: Monthly volume of tourism day visits taken in Wales



Activities Core to Tourism (ACT) day visits are a subset of Tourism Day Visits where the main activity is going out for entertainment, watching live sports, trips to visitor attractions, going to special public events, undertaking outdoor leisure activities or going on general days out. In the 12 months ending March 2018, there were 33.3 million day visits taken in Wales that involved activities core to tourism. This was an increase of 0.8 per cent compared to the total of 33.0 million trips in the 12 months ending March 2017. Over the last 12 months day visits including activities core to tourism comprised an average of 33 per cent of all tourism day visits taken in Wales.

Figure 1.8: Volume of day visits taken in Wales involving activities core to tourism Rolling 12 month total



International visits

We do not yet have figures for international visits to Wales for the first quarter of 2018.

Provisional results from the International Passenger Survey covering the period January to March 2018 are due to be published by Office for National Statistics in September 2018.

The results reported in this section cover the period January to December 2017 and have already been reported in the previous Tourism Performance Report covering the calendar year 2017.

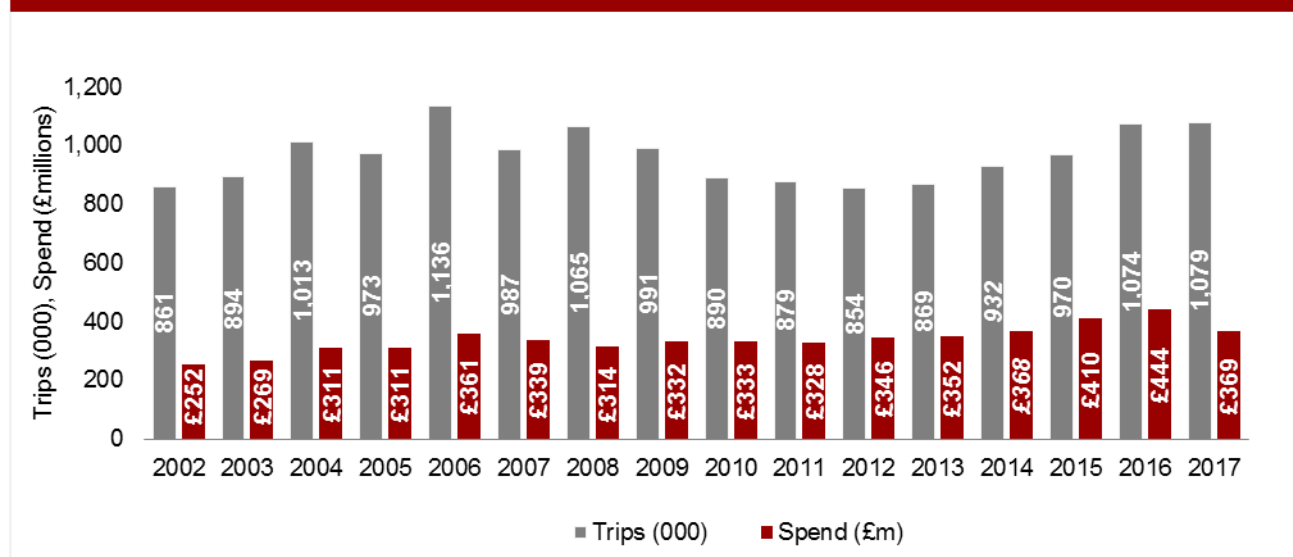
Table 1.4 Volume (000s) and value (£ millions) of inbound international visitors. January to December 2017

	Trips (000s)	% change from year before	Spend (£ millions)	% change from year before
Wales	1,079	+0.5	£369	-16.9
Scotland	3,210	+17	£2,276	+23.0
London	19,828	+4.0	£13,546	+14.0
Rest of England	16,496	+3.0	£7,814	0
Total UK	39,214	+4.0	£24,507	+9.0

There were a record 39.2 million international trips to the UK during 2017, with inbound visitor spending reaching a record £24.5 billion, with above average increases in visitors from United States and countries outside of Europe. There has been particularly strong growth in holiday trips and visits to friends and relatives, increasing by 11 per cent and 4 per cent respectively.

All regions across the UK have experienced increases in the volume of international trips, with Scotland and London performing strongly. There was growth in trips to Wales of 0.5 per cent during 2017 compared to the previous year. However, spend in Wales during the same period decreased by 17 per cent, in contrast to spend growth across the UK as a whole.

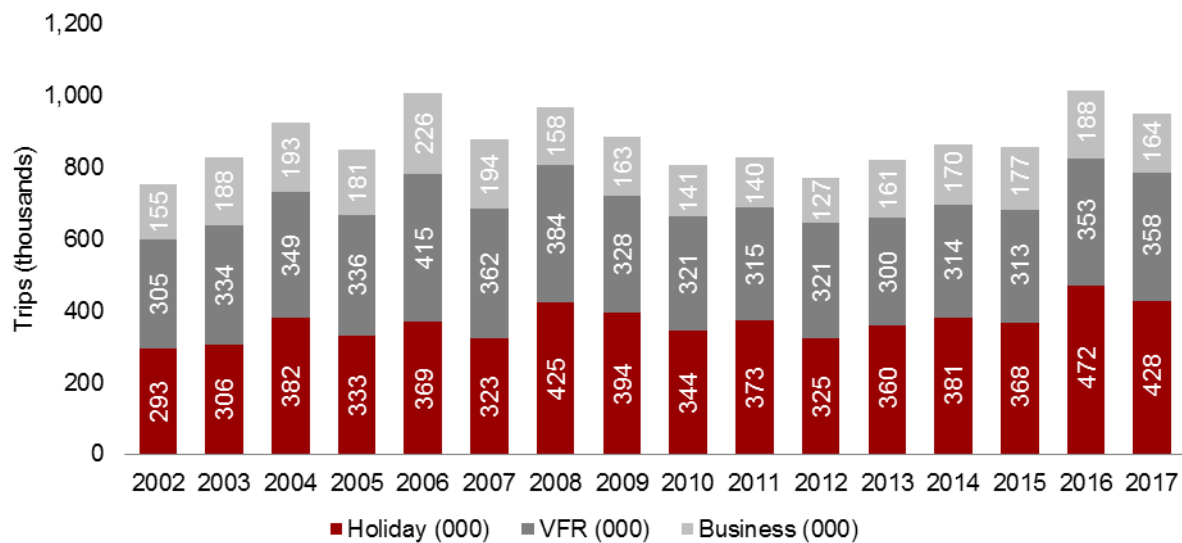
Figure 1.9 Volume (000s) and spend (millions) by international visitors to Wales



As seen in Figure 1.9 the volume of trips taken in Wales by international visitors remained above 1 million visits in 2017, the second highest recorded level of visitors. However, spend during 2017 fell to £369, lower than the previous two years.

There was a notable change in the mix of international visitors to Wales during 2017. There was a fall of 44,000 in the volume of holiday trips, which is around 9 per cent. There was a fall of 24,000 in the volume of business trips. The fall in the volume of these trips was offset by an increase of 5,000 trips to visit friends and relatives, as well as a large increase of 69,000 trips for miscellaneous purposes (e.g. attending sporting events).

Figure 2.0 Volume of trips to Wales (thousands) by International Visitors by Main Purpose of Visit

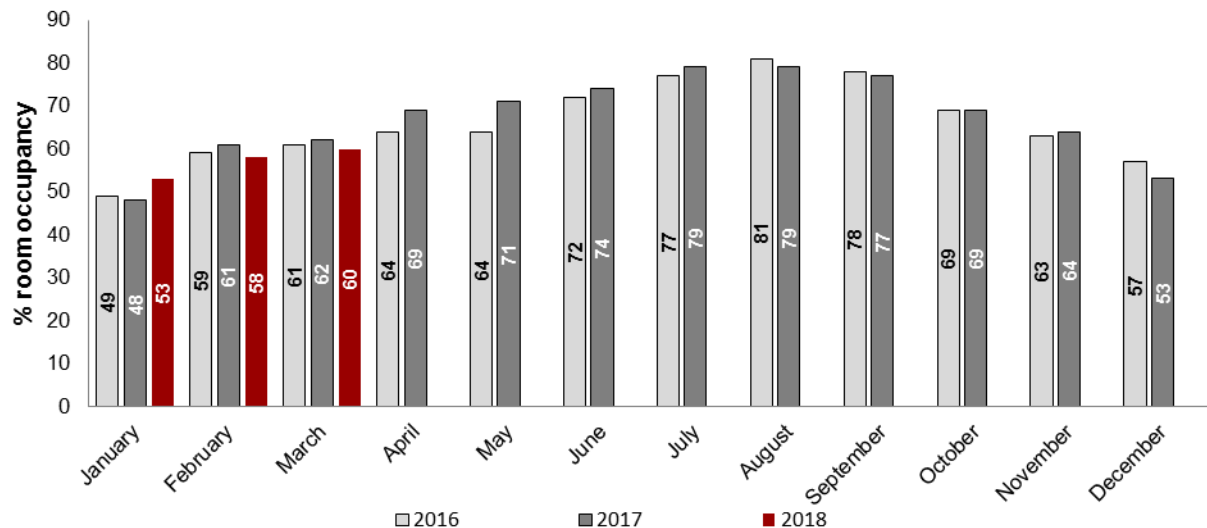


Accommodation occupancy rates

Hotels

The average room occupancy for hotels in Wales between January and March 2018 was 57%, the same as the average for the equivalent period in 2017. However, the room occupancy in March 2018, the month in which Easter fell, was 60 per cent, which is lower than the level of 62 per cent in March 2017.

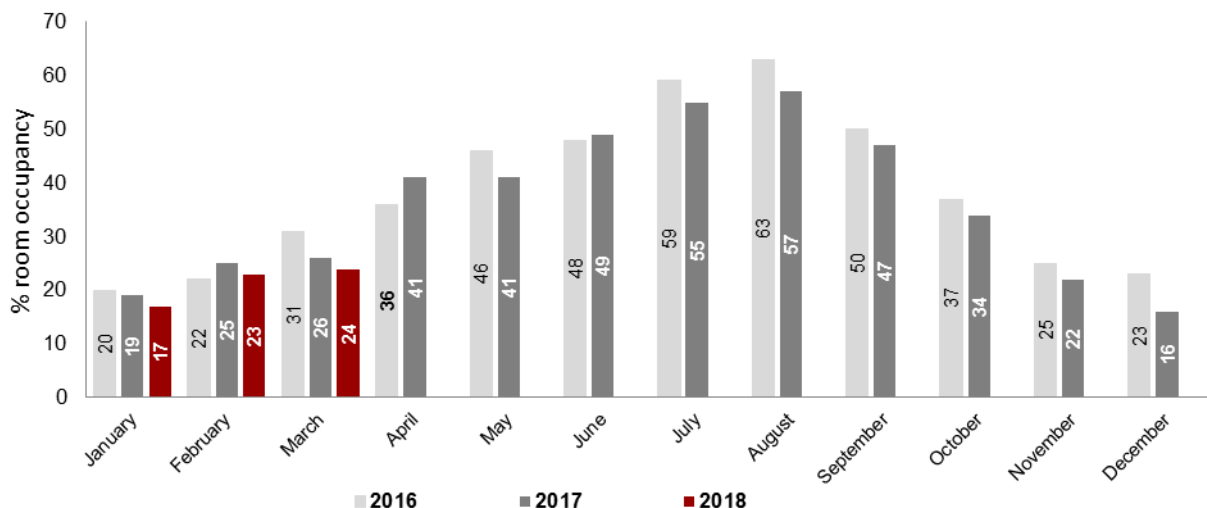
Figure 2.1: Average monthly room occupancy for hotel establishments in Wales



Guest houses and bed & breakfast

Figure 2.2 shows the average room occupancy for Guest Houses and Bed and Breakfast establishments in Wales between January and March 2018 was 21 per cent, which is lower than the average of rate of 23 per cent for the equivalent period in 2017. The occupancy rate in 2018 is lower in each of the first three months of 2018.

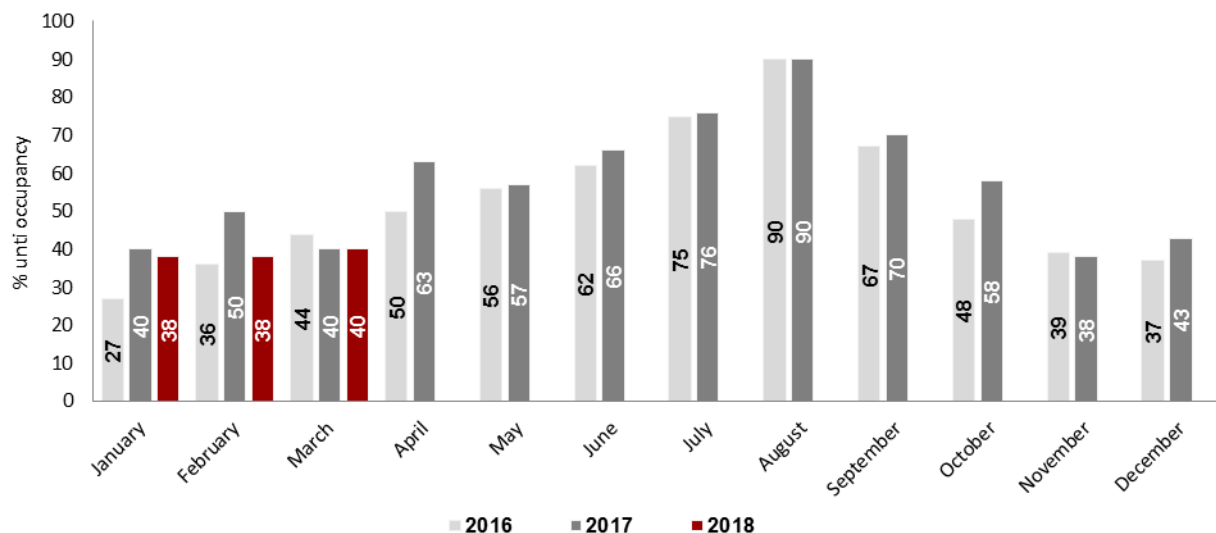
Figure 2.2: Average monthly room occupancy rate for guest houses & bed & breakfast establishments in Wales



Self catering cottages and apartments

The average unit occupancy for self-catering establishments in Wales between January and March 2018 was 39%, lower than the average rate of 43% for the equivalent period in 2017. The occupancy rate was lower in January and February and the same level in March 2018.

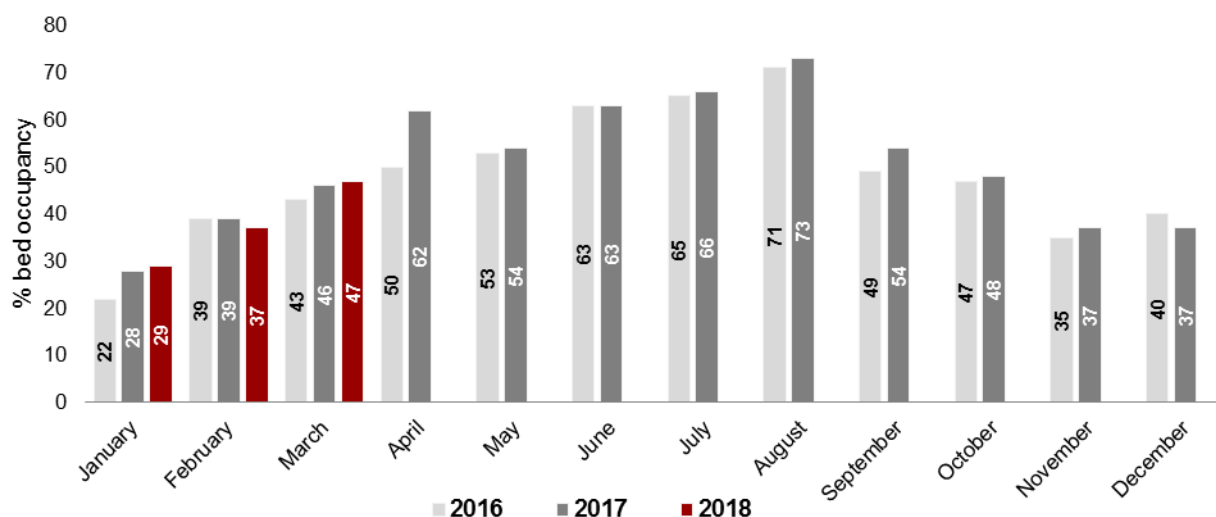
Figure 2.3: Average monthly occupancy rate for self catering establishments in Wales



Hostels & bunkhouses

The average unit occupancy for hostels and bunkhouses in Wales between January and March 2018 was 38 per cent, the same as the average for the equivalent period in 2017. The occupancy rate was slightly higher in March 2018.

Figure 2.4: Average monthly occupancy in hostels and bunkhouses in Wales



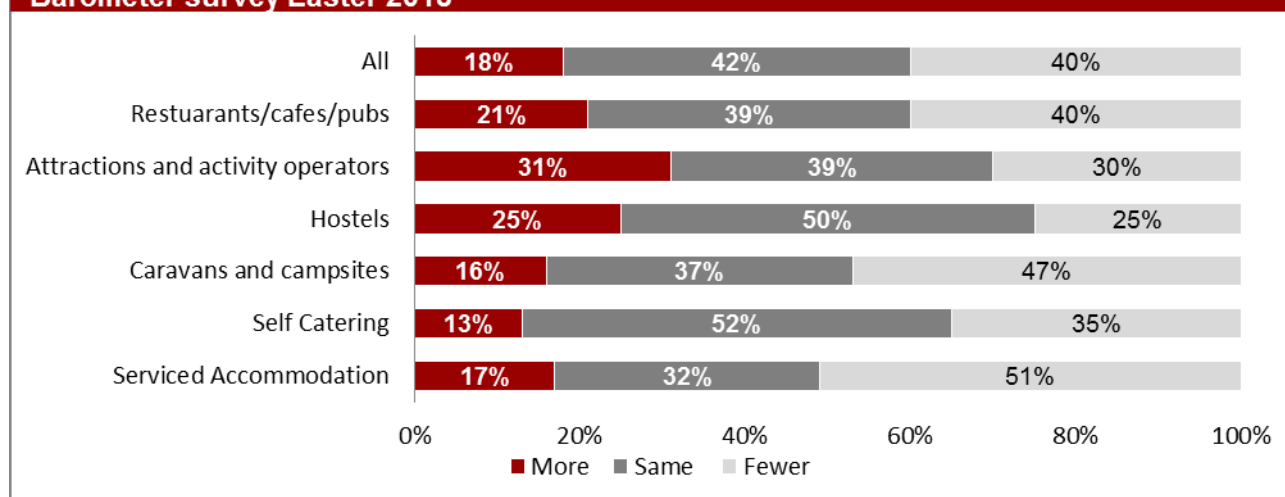
Business performance

This section provides the results from the Wales Tourism Business Barometer which is based on a survey of around 800 tourism businesses, reflective of different parts of Wales and different sectors in the visitor economy. The survey is designed to give quick feedback on how the tourism industry in Wales is performing at key times during the year.

Easter period

In the Business Barometer carried out after Easter 2018, businesses reported a relatively weaker start to the year in visitor levels with the majority stating that they had fewer or a similar level of visitors compared to the previous year. A minority reported more visitors. The lower visitor levels were primarily attributed to the poor weather at the start of the year and the early Easter holiday that started at the end of March. The higher proportion reporting lower visitor levels was seen across all types of business except for attractions and activity operators with a similar proportion of these reporting more or less visitors, possibly due to indoor attractions providing an alternative place to visit during the poor Easter weather.

Figure 2.5a: Compared with Easter last year, how many visitors have you had so far this year?
Barometer survey Easter 2018



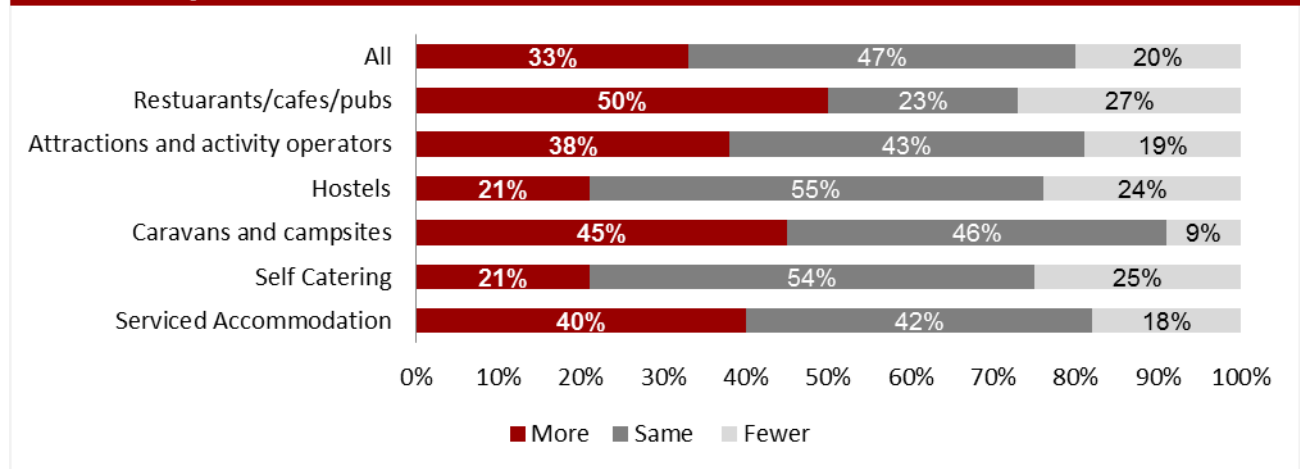
Survey June 2018

The Business Barometer undertaken in June, after the Spring bank holiday, reported a stronger spring period after the slow start for the year. A third of businesses reported more visitors compared to the same period last year and around half reported a similar level of visitors. Thus 80% of businesses reported greater or equal levels of visitors compared with the same period in 2017. Businesses attributed the pick up in visitor levels due to the good weather in the lead up to and over the Spring bank holiday.

The best performing sectors were restaurants, pubs and cafes with half reporting more visitors and caravan and campsites also performed strongly with just under half reporting higher visitor levels. The majority of serviced accommodation operators reported more or similar levels of visitors compared to last year. The self-catering sector and hostels reported a more mixed performance with around a quarter of businesses reporting lower visitor levels, slightly more than the proportion mentioning higher visitor levels.

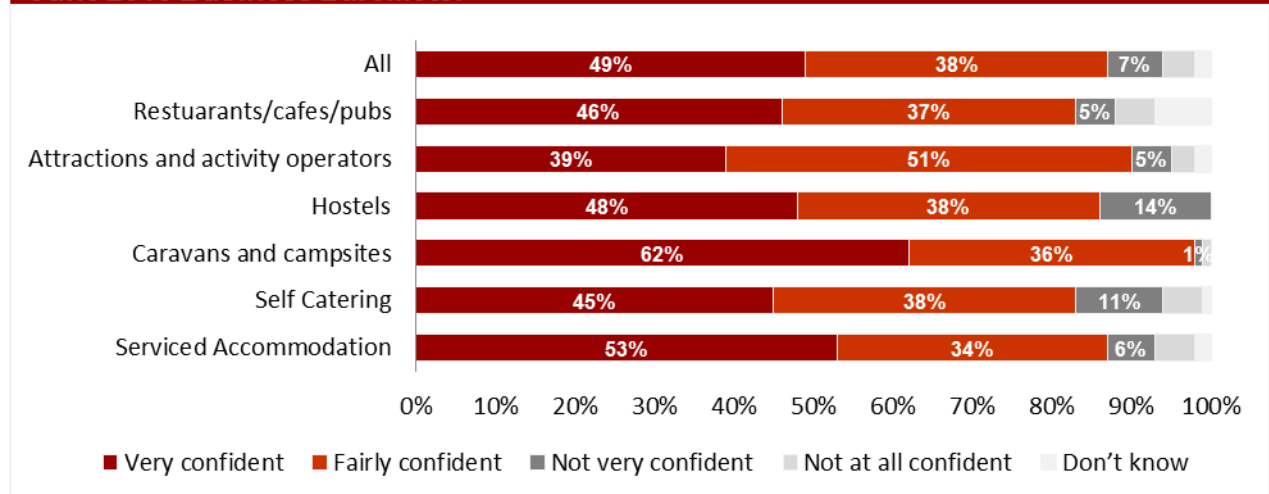
A lower proportion of businesses reported increases in profitability than increase in visitor numbers. This is most notable for self-catering and serviced accommodation businesses suggesting that there is a squeeze in profit margins impacting these sectors.

**Figure 2.5b: Compared with last year how many visitors have you had so far this year?
June Survey 2018**



The overall boost in visitor levels and continued good weather during the Spring and early summer has boosted business confidence with 87 per cent of businesses expressing confidence for the summer ahead, 49 per cent being 'very confident' and a further 38 per cent 'fairly confident'.

**Figure 2.6: How confident are you for the summer season?
June 2018 Business Barometer**

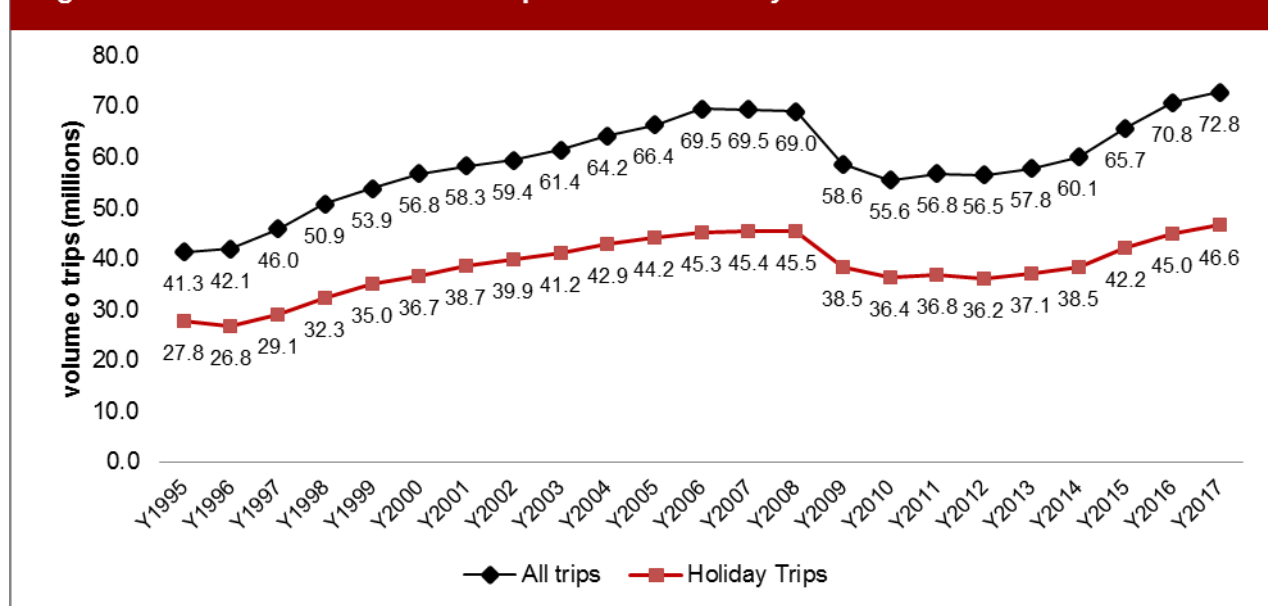


Overseas travel by UK residents

Trips taken overseas by UK residents fell sharply with the onset of the economic downturn in 2009, but have gradually recovered since 2013 with strong growth of 9 per cent and 8 per cent in 2015 and 2016. There was continued growth in 2017 with outbound trips reaching a record level of 72.7 million, but the rate of annual growth slowed to 3 per cent. Between January and December 2017, there was a record level of expenditure of £44.8 billion on trips taken abroad by UK residents.

Holiday trips taken abroad by UK residents have followed a similar pattern with strong growth in 2015 and 2016. Although there was slower growth of 4 per cent in 2017, the total number of holidays taken abroad reached a record level of 46.6 million trips.

Figure 2.7: Trends in volume of Trips taken abroad by UK residents



Key quality information

Relevance

What are the potential uses of these statistics?

These statistics will be used in a variety of ways. Some examples of these are:

- to make publicly available data on tourism in Wales
- advice to Ministers
- to inform debate in the National Assembly for Wales and beyond

Who are the key potential users of this data?

These statistics will be useful both within and outside the Welsh Government. Some of the key potential users are:

- Tourism businesses
- Ministers and the Members Research Service in the National Assembly for Wales
- Visit Wales and other areas of the Welsh Government
- Local Authorities
- Professional organisations
- The research community
- Students, academics and universities
- Individual citizens and private companies

Timeliness and punctuality

All outputs adhere to the Code of Practice by pre-announcing the date of publication through the upcoming calendar. Furthermore, should the need arise to postpone an output this would follow the Welsh Government's Revisions, Errors and Postponements arrangements.

We publish data as soon as possible after the relevant time period.

Accessibility and clarity

This statistical release is pre-announced and then published on the Statistics section of the Welsh Government website.

Comparability and coherence

This report presents estimated data for 2018 and previous calendar years. The annual estimates are comparable between years, subject to specific sample margins for each individual survey. Further details of each survey methodology and sample limitations are published on the tourism statistics section of the [Welsh Government website](#).

Since 2016 there have been changes to the data processing system of the Great Britain Tourism Survey. A technical document has been published separately on the [Welsh Government website](#) which explains what these changes are, why they were made, how this affects the data collected as well as what implications this has when comparing data from 2016 onwards with previously published figures.

Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly. The 46 national indicators were laid in March 2016.

Information on the indicators, along with narratives for each of the well-being goals and associated technical information is available in the [Well-being of Wales report](#).

Further information on the [Well-being of Future Generations \(Wales\) Act 2015](#).

The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.

Further details

The document is available at:

<https://gov.wales/statistics-and-research/wales-tourism-performance/?lang=en>

Next update

The next Wales Tourism Performance report will be published in October 2018 (final date to be confirmed) and will include statistics for the period April to June 2018 from each of the main surveys.

We want your feedback

We welcome any feedback on any aspect of these statistics which can be provided by email to tourism.research@gov.wales

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