

## Wales Tourism Performance Report : January to March 2019

15 August 2019  
SFR 63/2019

This report presents the results from the main official tourism surveys for Wales covering the period January to March 2019. Data is reported for the combined 3 months from January to March 2019 as well as totals for the 12 months ending March 2019. Details of each survey including links to further information is provided in section 8 at the end of the report.

### Main points

#### Overnight Visits by GB residents

- There were increases in visits to Wales in the first 3 months of 2019 compared with 2018: an increase of 6 per cent to 1.731 million in terms of trips and a slight decrease of 1.3 per cent to £295 million in related spend. The corresponding figures at GB level are decreases of 6.8 per cent and 1.5 per cent respectively.
- Over the 12 months ending March 2019, there were 10.1 million overnight trips to Wales, up by 11 per cent compared with the 12 months ending in March 2018, and the expenditure at £1,848 million was also up by 7.8 per cent.
- In comparison, the volume of overnight trips taken across GB as a whole and related expenditure have shown falling levels of visitor numbers and spend in the last 12 months with trip volumes reaching just under 117 million in the 12 months ending March 2019, which is 5.4 per cent lower than the previous 12 months.

#### Day visits

In the first 3 months of 2019, there were 16.6 million day visits to destinations in Wales, down 17 per cent on the first quarter of 2018. Related spend (£874 million) was down by 22 per cent. The corresponding figures at GB level were down 6 per cent on trips and down 2 per cent in terms of spend.

### About this release

This is a 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 – [continued]**

### **Day visits (continued)**

- In the 12 months ending in March 2019, day trips to Wales (92.4 million) were down by 7 per cent and related spend (£3,760 million) was 15 per cent down. The corresponding figures at GB level showed a decrease on trips of 5 per cent and an increase of 2 per cent on related spend.

### **International visitors**

- The number of international trips to the Wales during the first quarter of 2019, fell by 4 per cent to 147,000. Visitor spending was £51 million, which was a 23 per cent decrease on same time last year.

### **Accommodation occupancy**

- All serviced accommodation types saw a slight fall in occupancy rates compared with the first quarter of last year: Hotels to 54 per cent, Guest Houses and B&Bs to 21 per cent, and Hostels to 37 per cent. Self-catering accommodation was however up to 45 per cent year on year.

### **Industry performance**

- Wave 2 of the Tourism Barometer, undertaken following the May/June half term in 2019, indicates that 83 per cent of businesses reported a greater (22 per cent of businesses) or equal (61 per cent of businesses) level of visitors compared with the corresponding period in 2018.
- Following a steady period, business in all sectors are confident for the coming summer season.

# 1. Overnight visits by GB residents

## All purposes of trip

**Table 1.0 Volume (millions) and Expenditure (£ millions) by Overnight Domestic GB Visitors All Purposes of Trip**  
*Source: GBTS*

Trips taken in Wales				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	1.731	+6.0	10.120	+11.0
Nights	4.654	+7.6	35.966	+14.6
Spend (£)	£295	-1.3	£1,848	+7.8
Trips taken in Great Britain				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	22.555	-6.8	116.904	-5.4
Nights	56.526	-13.7	362.767	-5.1
Spend (£)	£4,344	-1.5	£23,893	-1.9

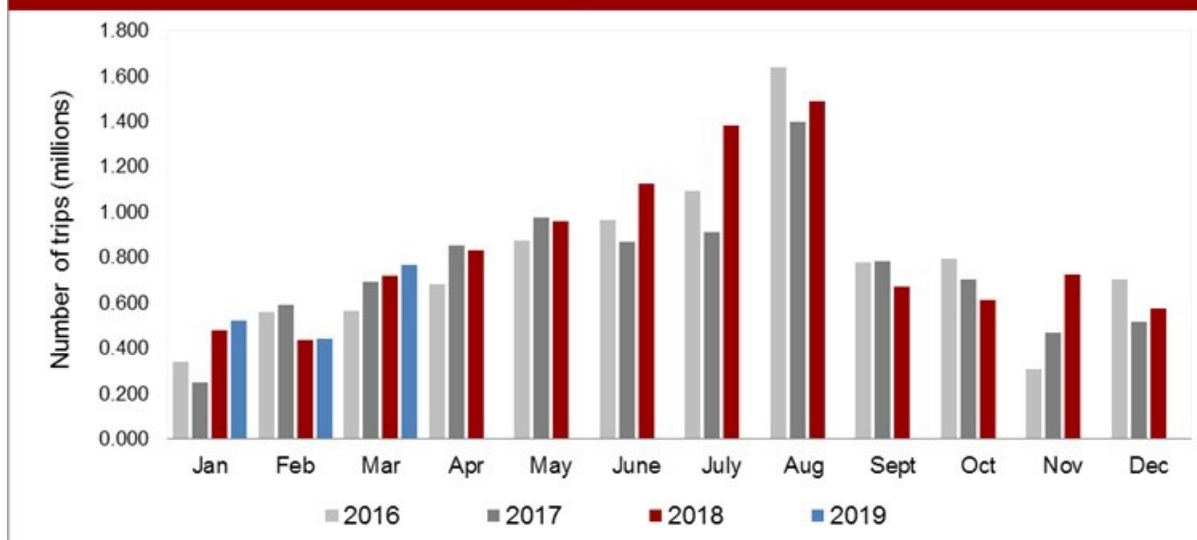
In the 12 months ending March 2019, there were 10.1 million overnight trips to Wales by GB residents, which is an 11 per cent increase on the total for the previous 12 months. For the 12 months ending March 2019, there was a total expenditure of £1,848 million, an increase of 7.8 per cent compared to the 12 months ending March 2019.

The level of trips in Wales have grown during the first three months of 2019, but spending was slightly down compared to the same time last year.

Figure 1.1 shows that trips and spend to Wales peaked in early 2016 with around 10.5 million annual trips and £1,975 million in expenditure. There was a fall in trips taken in Wales during 2017, driven by a range of factors including fewer visitors during the summer period in 2017 and fewer visits by Welsh residents. However during the last year both spend and visitor levels have picked up and are now approaching the levels last seen in 2016.

In comparison, the volume of overnight trips taken across GB as a whole and related expenditure have shown falling levels of visitor numbers and spend in the last 12 months with trip volumes reaching 117 million in the 12 months ending March 2019, which is 5.4 per cent lower than the previous 12 months.

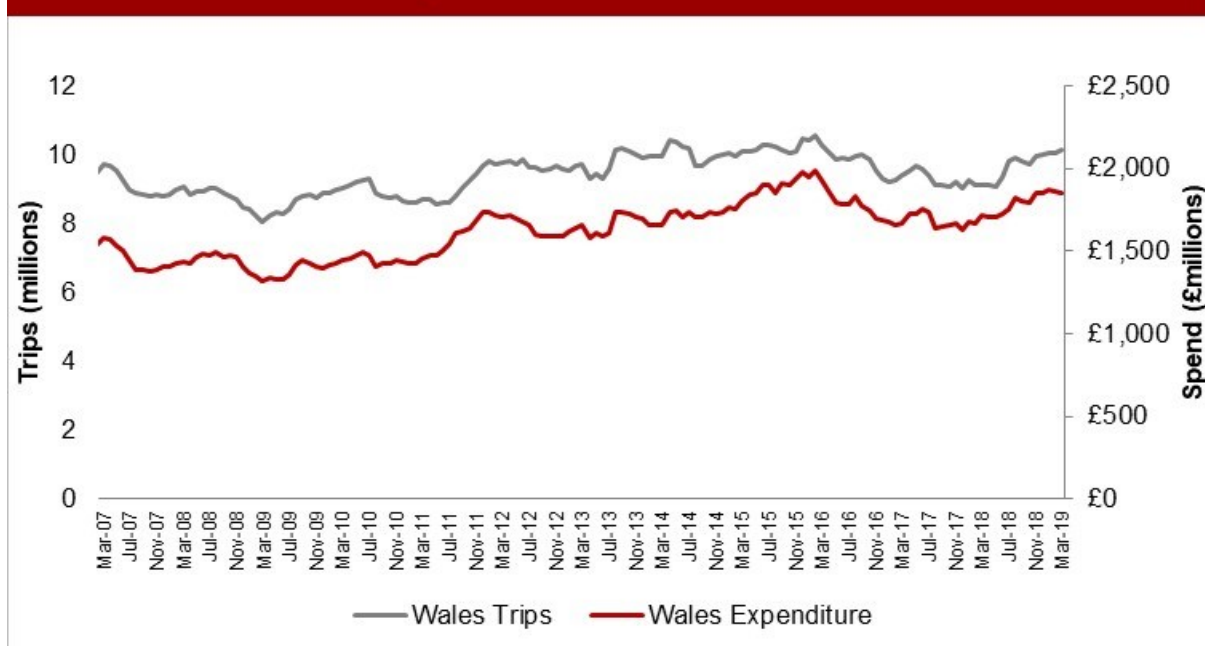
**Figure 1.0: Monthly Volume of Overnight Trips taken in Wales by GB Residents**  
Source: GBTS - Great Britain Tourism Survey



The chart shows that trips and spend to Wales peaked in early 2016 with around 10.5 million annual trips and £1,975 million in expenditure. There was a fall in trips taken in Wales during 2017. However during the last year both spend and visitor levels have picked up and are now approaching the levels last seen in 2016.

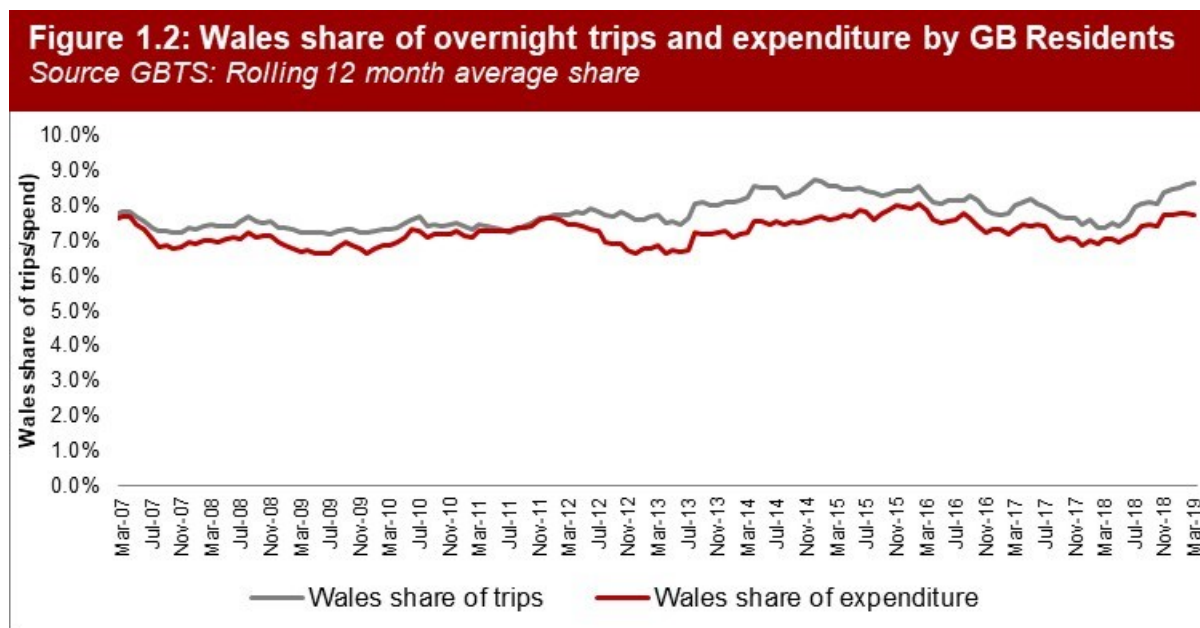
The chart shows that trips and spend to Wales peaked in early 2016 with around 10.5 million annual trips and £1,975 million in expenditure. There was a fall in trips taken in Wales during 2017. However during the last year both spend and visitor levels have picked up and are now approaching the levels last seen in 2016.

**Figure 1.1: Trends in Overnight Trips and Expenditure in Wales by GB Residents**  
Source: GBTS: 12 month rolling totals



## Wales share of trips and spend

Figure 1.2 shows that Wales' share of overnight trips (any purpose) taken by GB residents increased in the 12 months ending March 2019 to 8.7 per cent compared to 7.4 per cent for the 12 months ending March 2018. The share of spend has also increased slightly to 7.7 per cent compared to 7.0 per cent for the 12 months ending March 2018.



## Overnight holidays

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

Source: GBTS

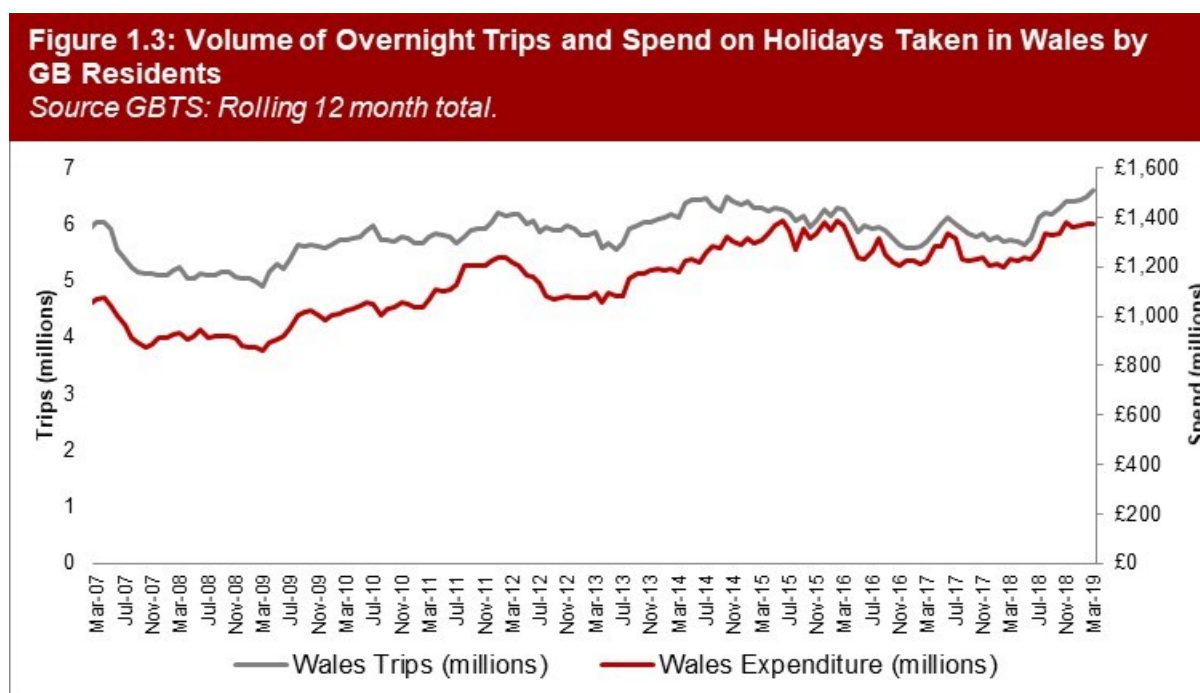
Holiday Trips taken in Wales				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	0.996	+23.4	6.601	+15.4
Nights	2.850	+22.6	25.013	+18.5
Spend (£)	£180	+7.8	£1,376	+11.9
Holiday Trips taken in Great Britain				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	9.521	+0.4	57.935	-3.5
Nights	24.503	-5.1	198.944	-3.5
Spend (£)	£1,939	-7.5	£14,134	-1.6

In the 12 months ending March 2019, there were a total of 6.6 million overnight holiday trips to Wales by GB residents which is an increase of 15.4 per cent on the total for the previous 12 months. For the 12 months ending March 2019, there was a related expenditure of £1,376 million, an increase of almost 12 per cent compared to the 12 months ending March 2018.

The volume of holiday trips and spend in Wales have both grown during the first three months of 2019, with increases in both trips and spending.

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, but during the last 6 months of 2018 the trip levels have increased to slightly above the 2014 level, a trend which continues into the beginning of 2019.

In comparison, the volume of overnight trips taken across GB as a whole have shown a slight decrease in the last 12 months with trip volumes falling to around 58 million in the 12 months up to March 2019.



## Visits to friends and relatives

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

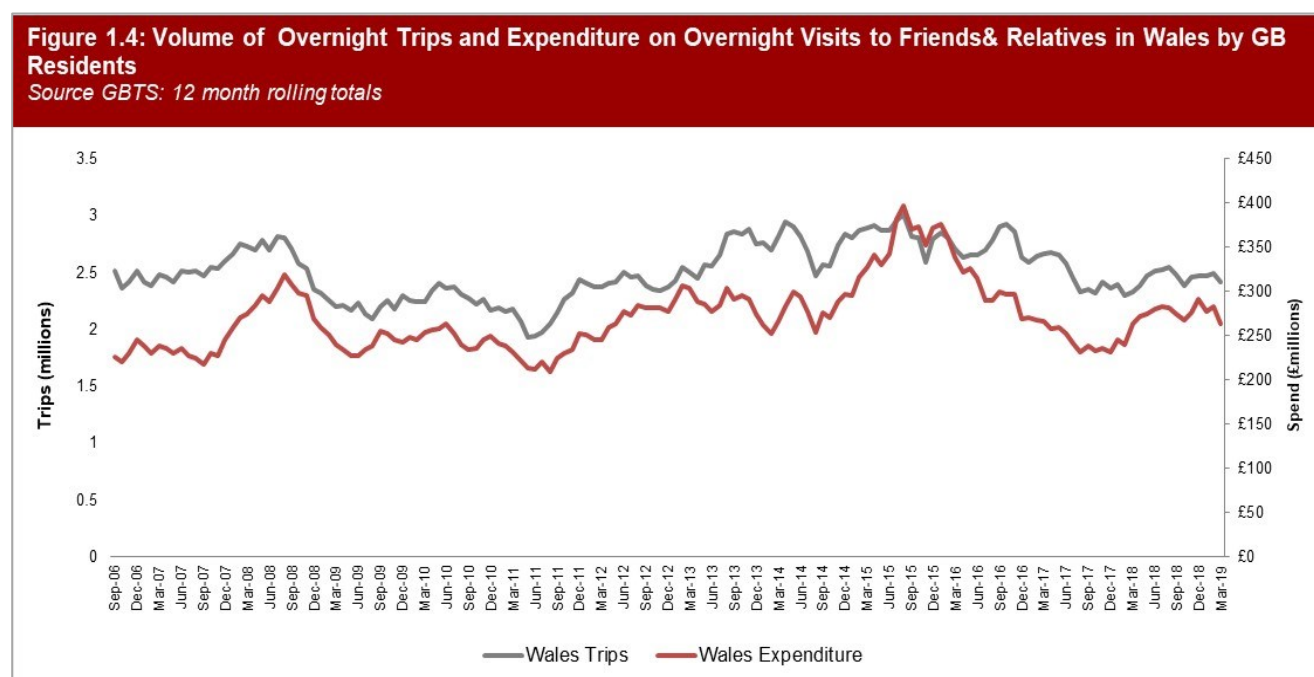
Source: GBTS

VFR Trips taken in Wales				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	0.464	-10.6	2.421	+3.7
Nights	1.190	-18.7	7.495	+6.3
Spend (£)	£43	-39.4	£263	0.0
VFR Trips taken in Great Britain				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	7.855	-20.3	39.046	-9.8
Nights	19.058	-33.1	113.104	-11.4
Spend (£)	£867	-15.9	£4,541	-6.2

In the 12 months ending March 2019, there were a total of 2.42 million overnight visits to friends and relatives in Wales by GB residents which is an increase of 3.7 per cent on the total for the previous 12 months. For the 12 months ending March 2019, there was a related expenditure of £263 million, roughly the same as this time last year.

Figure 1.4 shows that over the longer term, trips to visit friends and relatives in Wales have fluctuated 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. Although the visitor levels recovered somewhat in 2018, the overall trip levels taken in Wales are still well below their previous peak.

In comparison, there has been a slight decrease in overnight visits to friends and relatives across GB as a whole during 2018, which has continued into the first 3 months of 2019.



## Business visits

**Table 1.3 Volume (millions) and Value (£ millions) of Overnight Domestic GB Visitors Business Visits**

Source: GBTS

Business visits taken in Wales				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	0.213	-24.5	0.758	-2.6
Nights	0.531	+10.2	2.007	+11.0
Spend (£)	£58	-1.7	£156	-10.3
Business Visits taken in Great Britain				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	4.367	+7.0	16.558	-3.3
Nights	10.592	+25.6	41.113	+8.5
Spend (£)	£1,403	+24.2	£4,644	+3.2

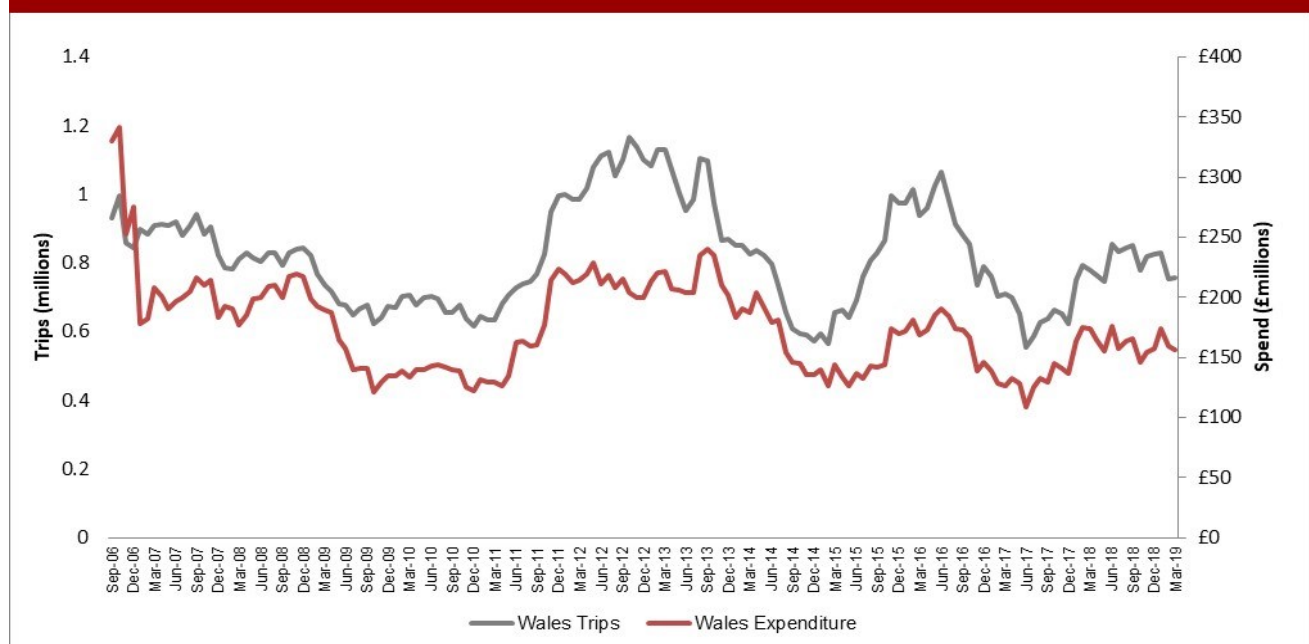
In the 12 months ending March 2019, there were a total of 0.758 million overnight business trips taken in Wales by GB residents which is a fall of 2.6 per cent on the total for the previous 12 months. For the 12 months ending March 2019, there was a decrease in expenditure to £156 million, a fall of 10.3 per cent compared to the 12 months ending March 2018.

There was a decrease in the volume of trips and spend during the first three months of 2019, but an increase in the number of nights indicates that people stay longer when taking a business trip.

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. 2018 showed a general increase in the overall level of business visits with 0.8 million trips taken that year.

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 fall in the volume of trips from over 18.6 million annual trips in 2006 to the current volume of 16.5 million trips taken in the 12 months ending March 2019.

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



## 2. Domestic GB tourism day visits

**Table 2.0: Volume of Trips and Expenditure on Tourism Day Visits by GB residents**  
Source: GBDVS

Tourism Day Visits taken in Wales				
	Jan to March 2019 (millions)	% change from year before	12 month total ending March 2019 (millions)	% change from year before
Trips	16.6	-17	92.4	-7
Spend (£)	874	-22	£3,760	-15
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	356.2	-6	1,679.3	-5
Spend (£)	13,693	-2	£63,563	+2

In the 12 months ending March 2019, there were a total of 92.4 million tourism day visits taken in Wales by GB residents which is a decrease of 7 per cent on the total for the previous 12 months. For the 12 months ending March 2019, there was an expenditure of £3,760 million, a decrease of 15 per cent compared to the 12 months ending March 2018.

**Figure 2.0: Monthly Volume of Tourism Day Visits taken in Wales**  
Source: GBDVS

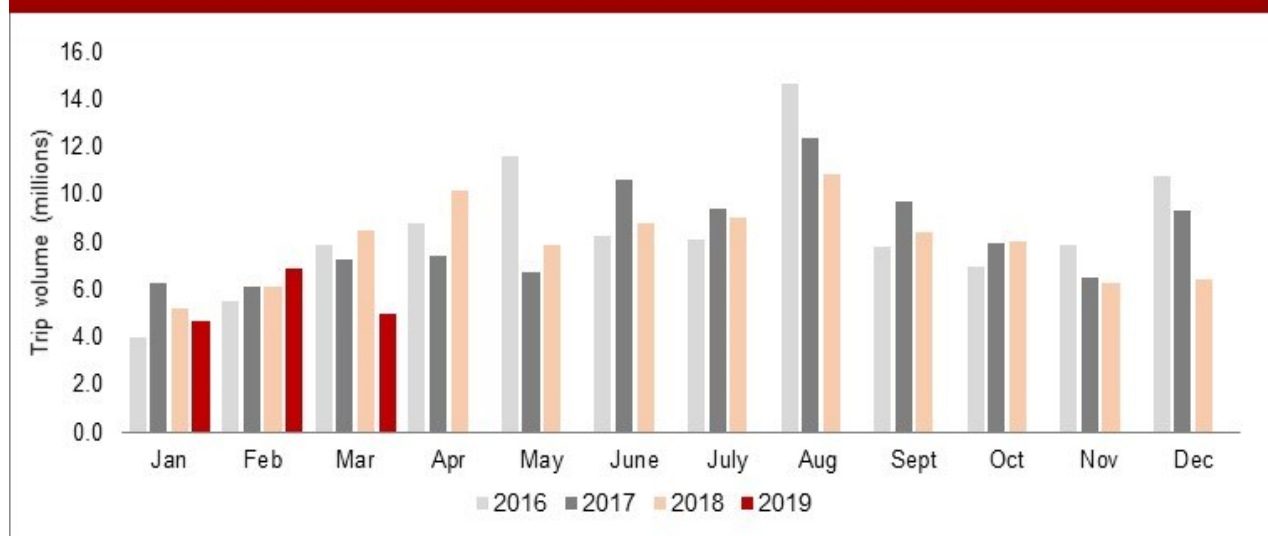
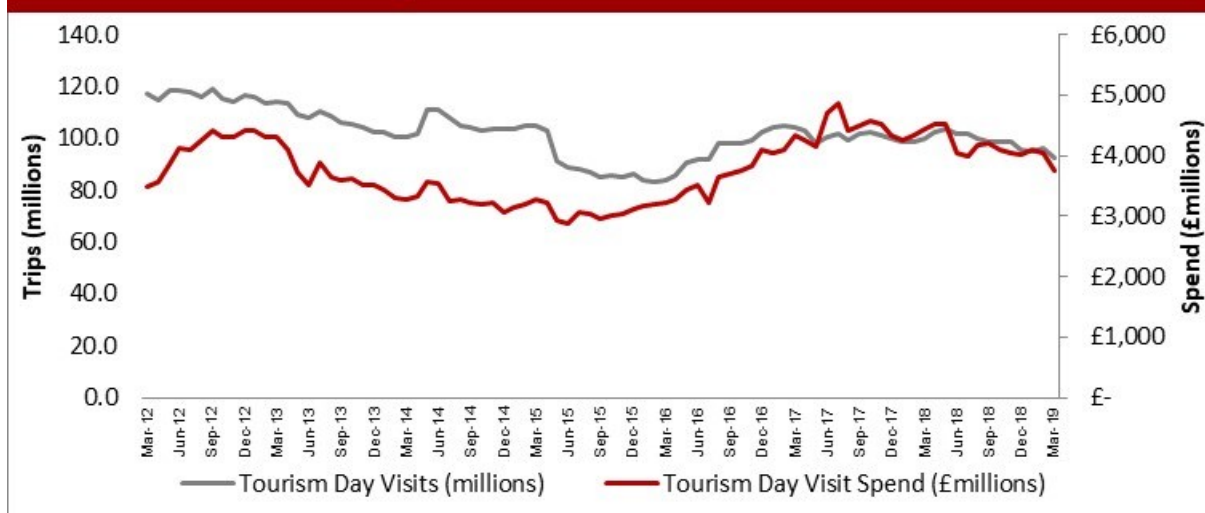


Figure 2.1 shows that Tourism Day Visits taken in Wales by GB residents fell from a level of around 117 million annual trips in 2011 to 86 million trips in 2015. Trip volumes have however increased over the last 2 years to over 100 million annual trips in early 2018, but are now falling slightly to their current level of 92 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 in 2016 and 2017. The average spend in Wales for the 12 months ending March 2019 is £41, compared to £38 for GB as a whole.

Tourism Day Visits across Great Britain as a whole have also fallen from a peak level in 2012 of 1,969 million annual trips to a low of 1,679 million annual trips in the period ending March 2019.

**Figure 2.1: Volume of trips and spend on Tourism Day Trips taken in Wales by GB Residents**

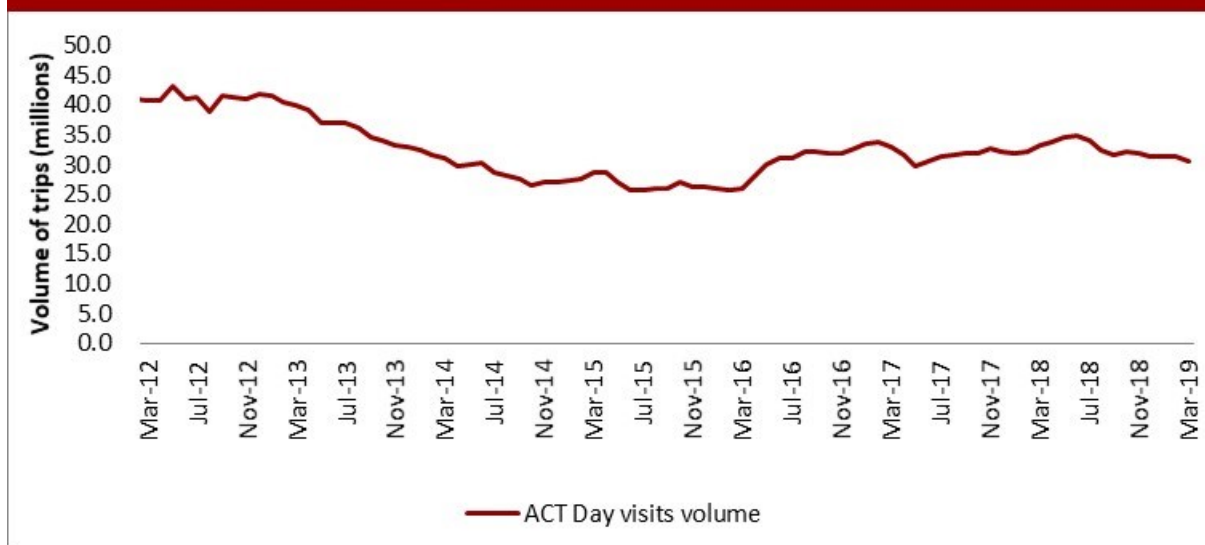
Source: GBDVS 12 month rolling total



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 2019, there were 30.5 million day visits taken in Wales that involved Activities Core to Tourism. This was a decrease of 8 per cent compared to the total of 33.3 million trips in the 12 months ending March 2018. 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 2.2: Volume of Day Trips taken in Wales involving Activities Core to Tourism**

Source: GBDVS 12 month rolling total



### 3. International visits

The results reported in this section are from the International Passenger Survey (IPS) and cover the first quarter of 2019.

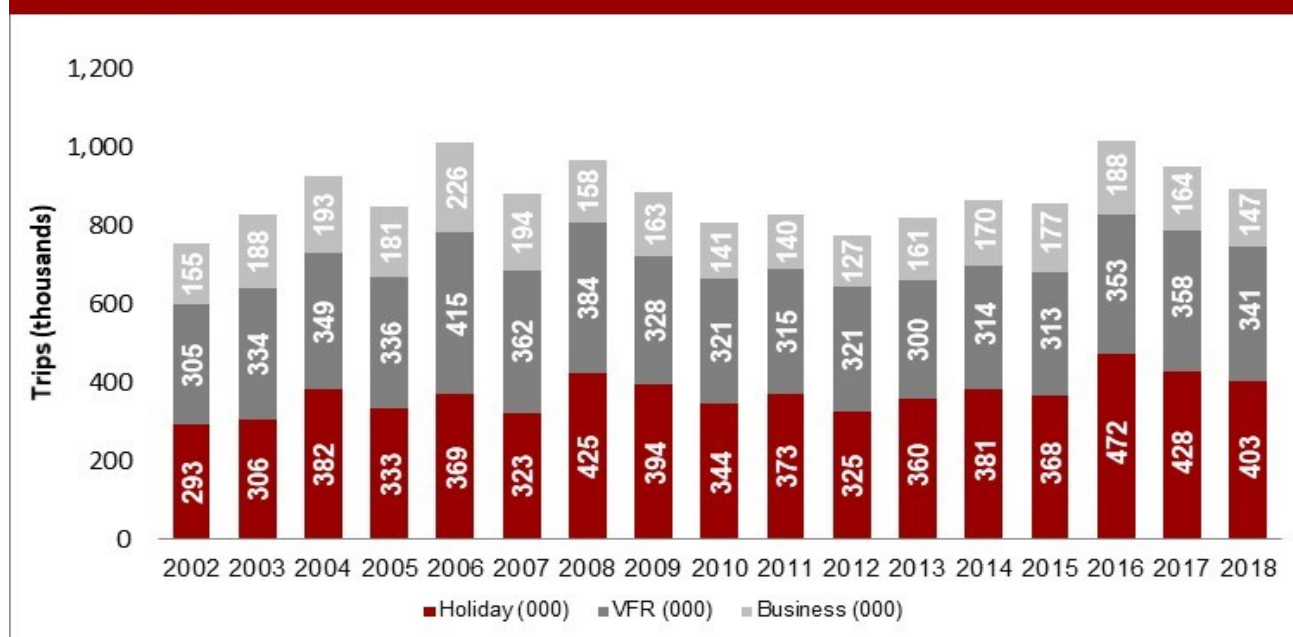
**Table 3.0 Volume of Trips and Expenditure of Inbound International Visitors. January to March 2019**

*Source: IPS*

	Trips (000s)	% change from year before	Spend (£ millions)	% change from year before
Wales	147	-4	£51	-23
Scotland	415	-35	£193	-43
London	4,240	+5	£2,713	+5
Rest of England	3,232	+4	£1,231	-12
Total UK	7,957	+1	£4,262	-5

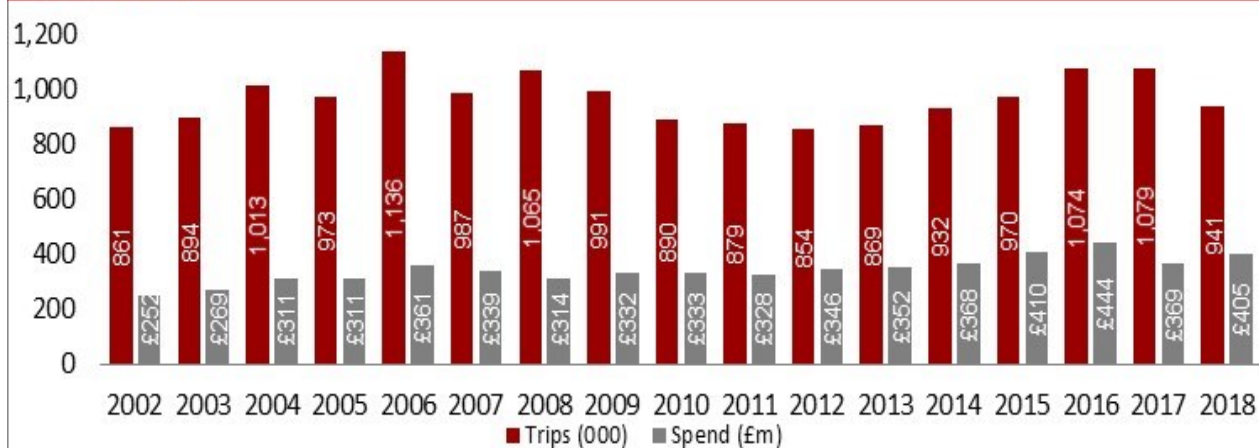
The number of international trips to Wales during the first quarter of 2019, fell by 4 per cent to 147,000. Inbound visitor spending was £51 million, a 23 per cent decrease on same time last year. Other than Wales, Scotland experienced a 35 per cent decrease in the volume of international trips, with London performing strongly on both trips and expenditure. The rest of England saw increased international visitor numbers but a decrease in spending.

**Figure 3.0: Volume of International Trips to Wales by main purpose of visit**  
*Source: IPS*



**Figure 3.1: Volume of trips (000's) and expenditure (£millions) by International visits to Wales**

Source: IPS



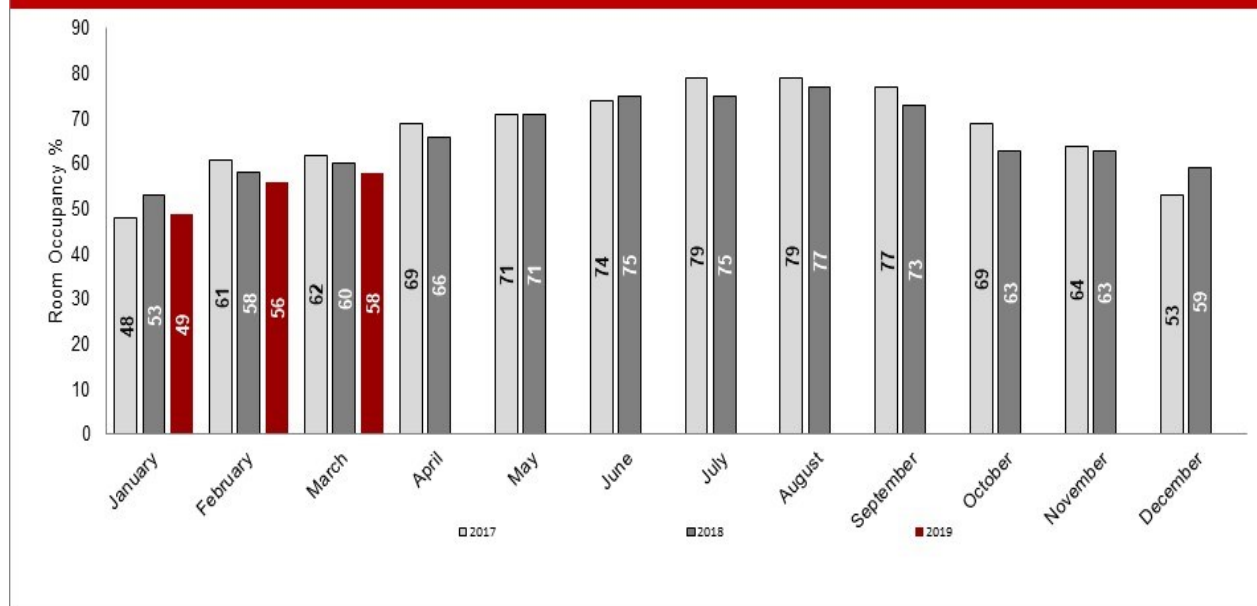
## 4. Accommodation occupancy rates

### Hotels

The average room occupancy for hotels in Wales between January and March 2019 was 54 per cent, which is slightly down from the 57 per cent from the same time last year. The bed occupancy rate in this period was 41 per cent, which was the same as last year.

**Figure 4.0 Average monthly room occupancy for Hotel Establishments in Wales**

Source: Visit Wales Occupancy Survey



### Guest houses and bed & breakfast

Figure 4.1 shows the average room occupancy for Guest Houses and Bed and Breakfast establishments in Wales between January and March 2019 was 21 per cent, which is similar to the equivalent period in 2018.

**Figure 4.1: Average monthly room occupancy for Guest House and Bed and Breakfast Establishments in Wales**

Source: Visit Wales Occupancy Survey

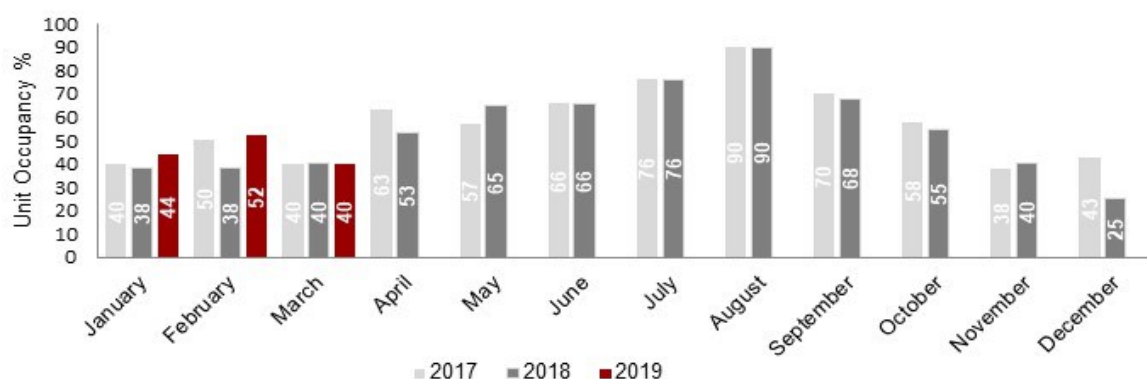


## Self-catering cottages and apartments

The average unit occupancy for self-catering establishments in Wales between January and March 2019 was 45%, higher than the average rate of 39% for the equivalent period in 2018. The occupancy rate was higher than last year for both January and February and the same level in March.

**Figure 4.2: Average monthly unit occupancy for Self-Catering Accommodation in Wales**

*Source: Visit Wales Occupancy survey*

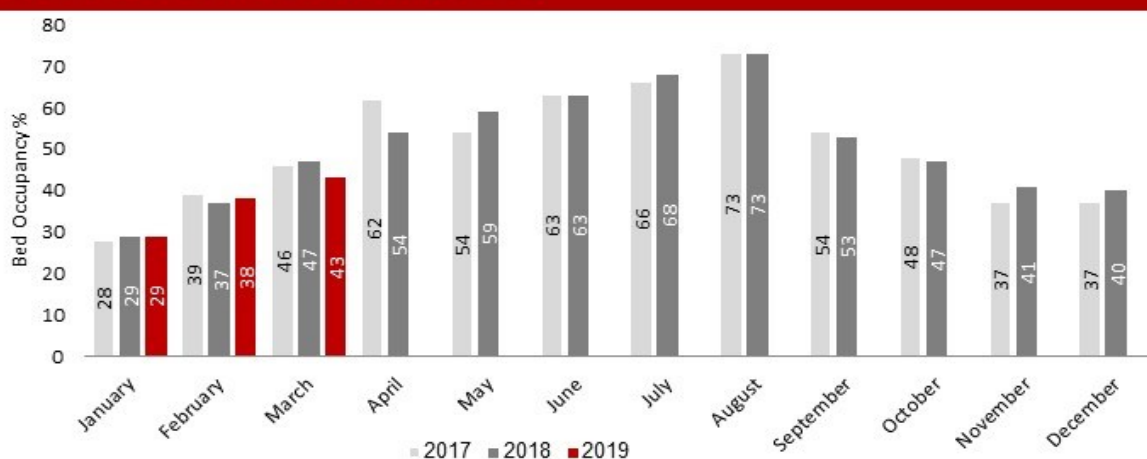


## Hostels and bunkhouses

The average monthly bedspace occupancy for hostels and bunkhouses in Wales between January and March 2019 was 37 per cent, slightly lower than the 38 per cent for the equivalent period in 2018.

**Figure 4.3: Average Monthly Bedspace Occupancy for Hostels & Bunkhouses in Wales**

*Source: Visit Wales Occupancy Survey*



## Caravan holiday homes and touring caravan and camping parks

As the caravan season does not normally start until April, please see the [Wales Tourism Performance Report January - December 2018](#).

## 5. Business performance

This section provides the results from the [Wales Tourism Business Barometer](#)<sup>1</sup>, 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.

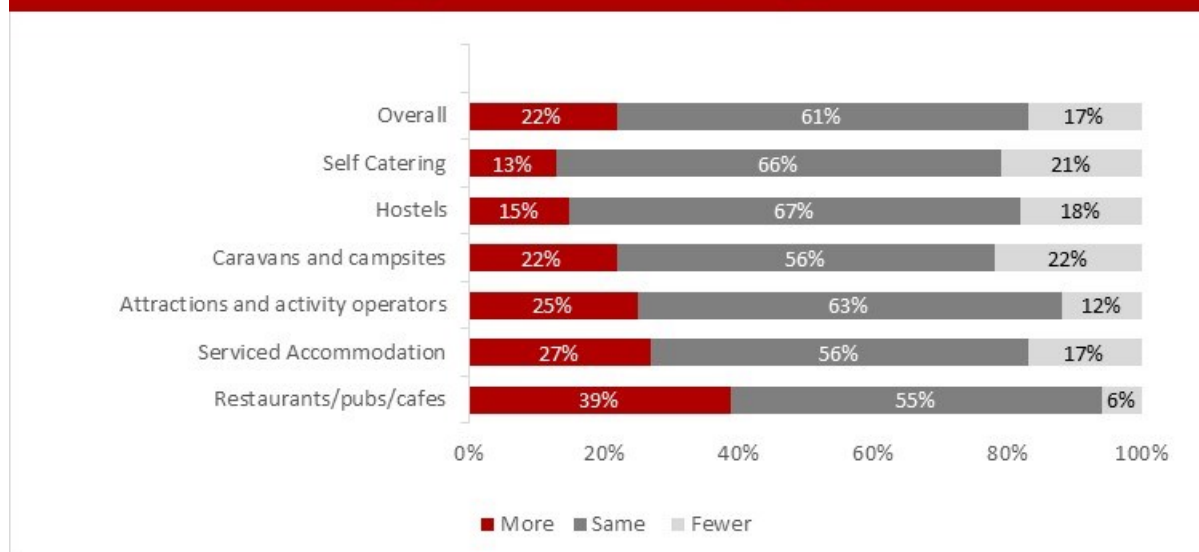
### Survey June 2019

The Business Barometer undertaken in June, after the Spring bank holiday, reported a steady time for the industry after the positive performance over Easter.

- Most (83%) businesses have increased or maintained their visitor levels during May/June half term. Among those reporting an increase in visitors, a third (32%) cite the weather as a reason. However, the weather is also cited as a key factor on performance among a third of those reporting fewer visitors.
- Repeat business has brought stability to the industry during this period. Three in ten (30%) of those seeing increased visitors cite this as a key factor.

**Figure 5.0: Reported visitor levels during May/June Half Term 2019**

*Source: Wales Tourism Industry Barometer - June 2019 survey*



Restaurants, pubs and cafes in areas of high tourism footfall are the best performing sector, with about two in five (39%) serving more tourist customers than the same period last year. About a third (31%) of these attribute the increased custom to their own marketing.

The serviced accommodation sector and attractions / activity providers are also up on balance. Repeat business is a key factor in serviced accommodation, cited by two in five of those who are up. Attractions & activity providers are more weather dependent, and two thirds of those who are up cite the weather as a factor.

<sup>1</sup> This source is not designated as an official statistic but is presented here for completeness for the benefit of users of this release.

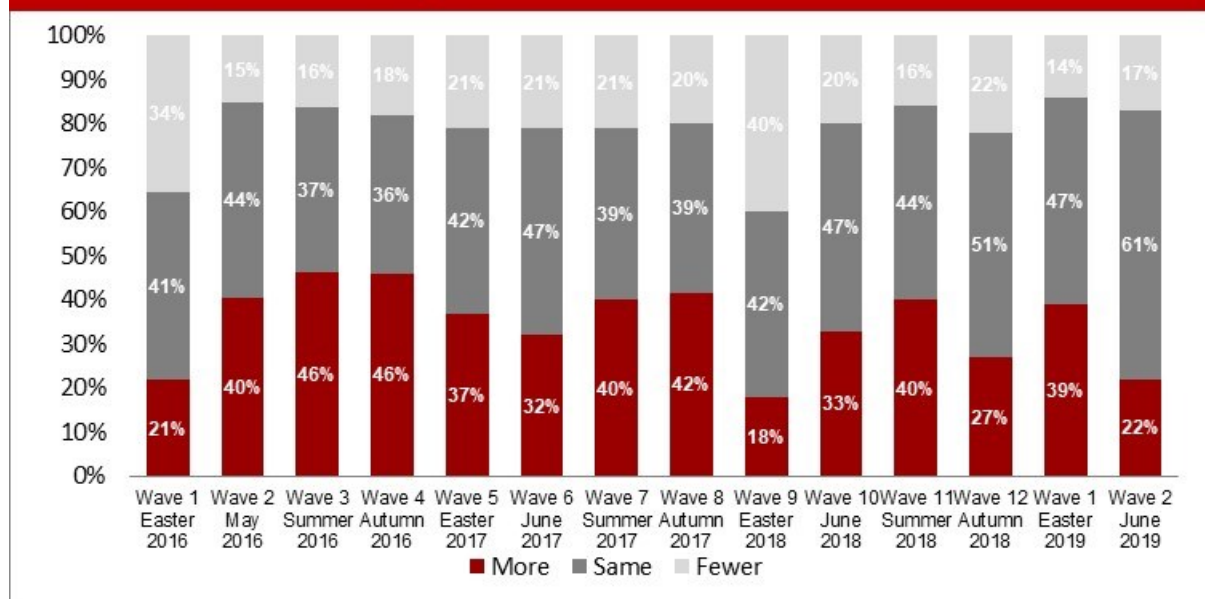
The self catering sector has been the most challenged in terms of increasing visitor levels. The most common reason for seeing decreased visitors in this sector is 'Brexit uncertainty', as this affected advance bookings.

Overall industry performance is reflected across the four regions of Wales (North, Mid, South West, South East). In each region, the majority of businesses report the same level of visitors as the same period last year.

Following a steady period, businesses in all sectors are confident about the coming summer season.

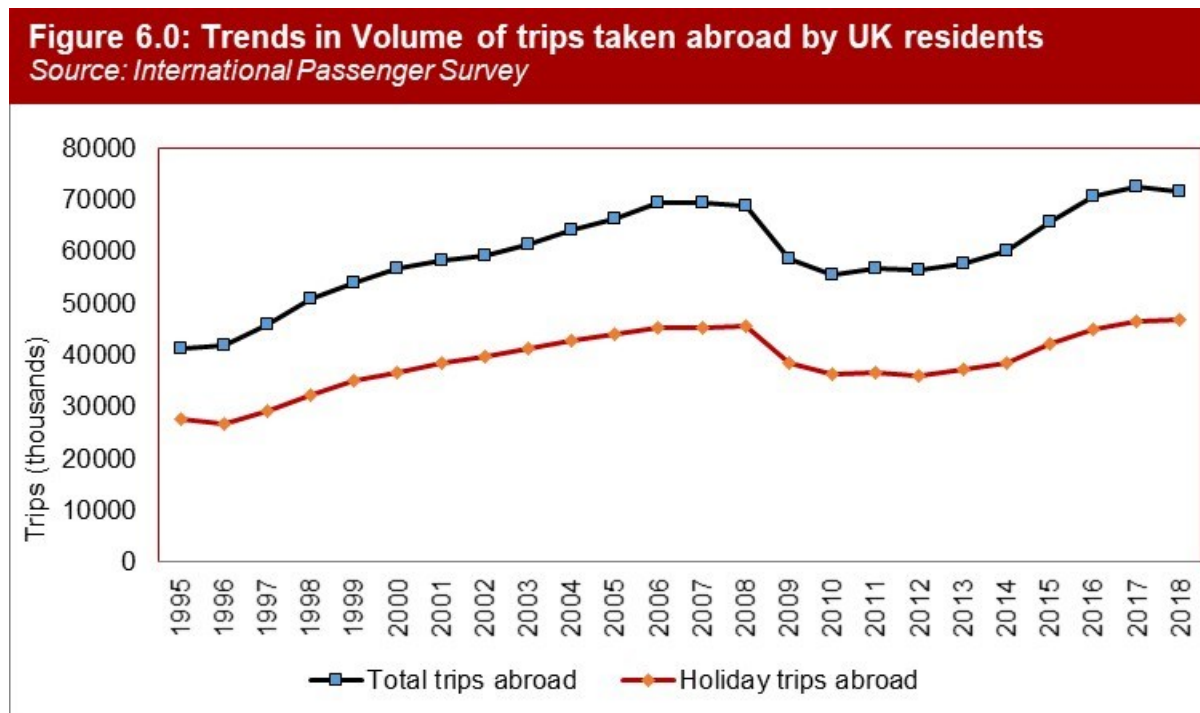
**Figure 5.1: Trends in reported visitor levels by businesses in Wales**

*Source: Wales Tourism Industry Barometer*



## 6. Overseas travel by UK residents

During 2018, there was a total 71.733 million trips taken overseas by UK residents for all purposes. For more information, please see the [Wales Tourism Performance Report January - December 2018](#).



## 7. Key Quality Information

The report includes data from the following surveys:

### **Great Britain tourism survey**

This is 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.

The GBTS survey is conducted continuously throughout the year, using face-to-face CAPI interviewing, with a representative sample of c.2,000 adults aged 16 and over each week, within GB. Respondents are asked whether they have taken any such trips in the previous four calendar weeks that involved at least one night away from home. The results are reported in terms of total GB population values. Therefore the data are weighted to correct for differences between the sample distribution and that of the population and also to gross the sample values up to the population. On average 2,000 interviews are conducted each week, some 100,000 interviews per year. For more information see [Great Britain Tourism Survey 2017](#)

### **Great Britain day visits survey**

This is 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.

GBDVS is undertaken using an online methodology with a total of ca 35,000 interviews conducted with adults aged 16 and over who were resident in England, Scotland and Wales during 52 weekly survey waves. Survey respondents were selected from an online panel with demographic quotas based on age, gender, working status, socio-economic status and area of residence applied in every survey wave to increase the representativeness of the achieved sample. The survey data is then weighted to further improve the representativeness of the outputs. For more information see

[Great Britain Day Visits Survey 2017](#)

### **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.

Link to IPS website: [IPS Tourism Survey](#)

### **Wales tourism accommodation occupancy survey**

This is 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. An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to cover all serviced accommodation, including guest houses, bed and breakfast establishments and non-graded serviced accommodation. For more information see

[Wales tourism accommodation occupancy surveys.](#)

## **Wales tourism industry barometer**

This is 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.

The 2019 Wave 2 has been conducted with 827 telephone interviews. This makes results of questions asked to everyone accurate to  $\pm 3.4\%$ . The sample is reflective of the tourism industry in Wales. For more information see [Wales Tourism Barometer wave 2 2019](#)

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.

## **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 2019 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/wales-tourism-performance-january-march-2019>

## **Next update**

The next Wales Tourism Performance report will be published in November 2019 (final date to be confirmed) and will include statistics for the period January to June 2019 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 [tourismresearch@gov.wales](mailto:tourismresearch@gov.wales)

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