

Wales Tourism Performance Report, January to December 2017 - Revised

2 August 2018
SFR 45/2018(R)

This report is a revision to the previously published edition to include the results from the International Passenger Survey for the full year 2017.

This is the first Wales Tourism Performance Report and covers results from the main official tourism surveys for Wales. This report summarises results from these surveys covering the period January to December 2017.

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 provide an interpretation of 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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1. Main points

Domestic GB overnight visitors

Overall trips and spend by GB residents to Wales fell in 2017, continuing the trend in 2016. This follows 3 years of strong growth between 2013 and 2015. There are notable differences by purpose of trip with an increase in overnight holiday trips taken in Wales during 2017, but a fall in business trips and trips to visit friends and relatives, both of which have been falling across GB as a whole during the last 5 years. There was an increase in overnight holiday trips taken across GB as a whole with over 59 million domestic holidays taken by GB residents in 2017, exceeding the previous peak level of staycations in 2009.

Domestic GB day visits

Spend on tourism day visits to Wales by GB residents increased in 2017 to £4.3 billion, the highest level of spending since 2012. The volume of trips to Wales fell slightly in 2017 with just under 100 million trips taken between January and December. The number of tourism day visits and spend in GB as a whole both fell in 2017.

International visitors (r)

There was a record level of international visitors to the UK during the period January to December 2017 with over 39.2 million trips spending a record £24.5 billion. There was strong growth in holiday trips during 2017, increasing by 11 per cent. There was also an increase of 4 per cent in visits to friends and relatives by international visitors to the UK during 2017, whereas business trips fell by 4 per cent. During January to December 2017, there were 1.079 million trips taken in Wales by international visitors, an increase of 0.5 percent compared with the same period in 2016. However, spending on trips to Wales by international visitors was lower during January to December 2017 compared to 2016.

Overseas travel by UK residents (r)

The improving economic situation over the last few years has led to growth in outbound overseas trips by UK residents. Outbound holidays in particular have been recovering strongly with 46.6 million trips taken in 2017, exceeding the peak levels reached before the economic downturn in 2006 to 2008. However, there were signs of slowing growth in 2017, possibly linked to higher exchange rates and a tightening economic situation.

Business performance

The Tourism Industry Barometer which surveyed businesses after key holiday periods in 2017 indicated a positive position for the industry throughout the year with more businesses reporting increases in visitor numbers and profitability in 2017. Around four in ten businesses reported more visitors and a similar proportion reported same level of visitors to the previous year. For most sectors visitor levels have increased more than reported profitability levels indicating a squeeze in visitor spending and profit margins. The results from the barometer following Easter 2018 indicate that poor weather in the early part of the year reduced visitor levels for many businesses but confidence remains positive for the year ahead.

(r) The results for international travel have been updated to include data for the whole of 2017.

Wales Tourism Accommodation Occupancy Survey

The Wales Accommodation Occupancy survey indicates a more mixed performance by the accommodation sector in 2017. The occupancy rates were higher for self catering and hostels, remained level for hotels, but there was a slight fall in occupancy rates for bed and breakfast establishments, touring caravans and camping.

Table 1.0 Main Survey Results - January to December 2017

Overnight Domestic GB Trips				
	Trips (millions)	% change from year before	Spend (£ millions)	% change from year before
Wales	9.02	-3.0	£1,628	-3.6
Great Britain	120.68	+1.0	£23,683	+2.6
Domestic GB Tourism Day Visits				
	Visits (millions)	% change from year before	Spend (£ millions)	% change from year before
Wales	99.70	-2.5	£4,332	+5.8
Great Britain	1,793.35	-2.2	£62,447	-2.3
International Visits (r)				
	Trips (millions)	% change from year before	Spend (£ millions)	% change from year before
Wales	1.08	+0.5	£369	-16.9
United Kingdom	39.21	+4.3	£24,507	+8.7
Outbound Travel by UK residents (R)				
	Trips (millions)	% change from year before	Spend (£ millions)	% change from year before
United Kingdom	72.77	+2.8	£44,840	+2.4
Wales Accommodation Occupancy Rates – Average Room/Unit/Bedspace Rate				
Accommodation Type	Rate	% change from year before		
Hotel	67%	0		
Guesthouse/B&B	38%	-1		
Self-catering	58%	+6		
Static Caravan	61%	-30		
Touring/camping	40%	-1		
Hostel	53%	+3		
Wales Tourism Barometer				
	December 2017	April 2018		
Reporting more visitors	42%	18%		
Reporting increased profits	39%	19%		
Very confident for 2018	27%	23%		

(r) Please note the figures for International Visitors have been revised to cover the full year from January to December 2017.

Sources: Great Britain Tourism Survey, Great Britain Day Visits Survey, International Passenger Survey, Wales Accommodation Occupancy Survey and the Wales Tourism Industry Barometer.

2. Domestic GB overnight visits

Table 1.1 Volume (millions) and Value (£ millions) of Overnight Domestic GB Visitors by Purpose of Trip - January to December 2017

All Purposes				
	Wales (millions)	% change from year before	Great Britain (millions)	% change from year before
Trips	9.02	-3.0	120.68	+1.0
Nights	30.98	-6.1	369.46	+2.8
Spend (£)	£1,628	-3.6	£23,683	+2.6
Holiday				
	Wales (millions)	% change from year before	Great Britain (millions)	% change from year before
Trips	5.71	+2.2	59.15	+5.8
Nights	20.97	-6.6	202.32	+6.0
Spend (£)	£1,203	-1.8	£14,134	+6.2
Visiting Friends and Relatives				
	Wales (millions)	% change from year before	Great Britain (millions)	% change from year before
Trips	2.37	-10.4	41.81	-1.2
Nights	6.91	+1.8	119.23	+2.7
Spend (£)	£233	-13.4	£4,651	-0.9
Business				
	Wales (millions)	% change from year before	Great Britain (millions)	% change from year before
Trips	0.62	-21.3	16.53	-1.4
Nights	1.53	-37.8	37.98	-1.9
Spend (£)	£136	-6.2	£4,244	-2.9

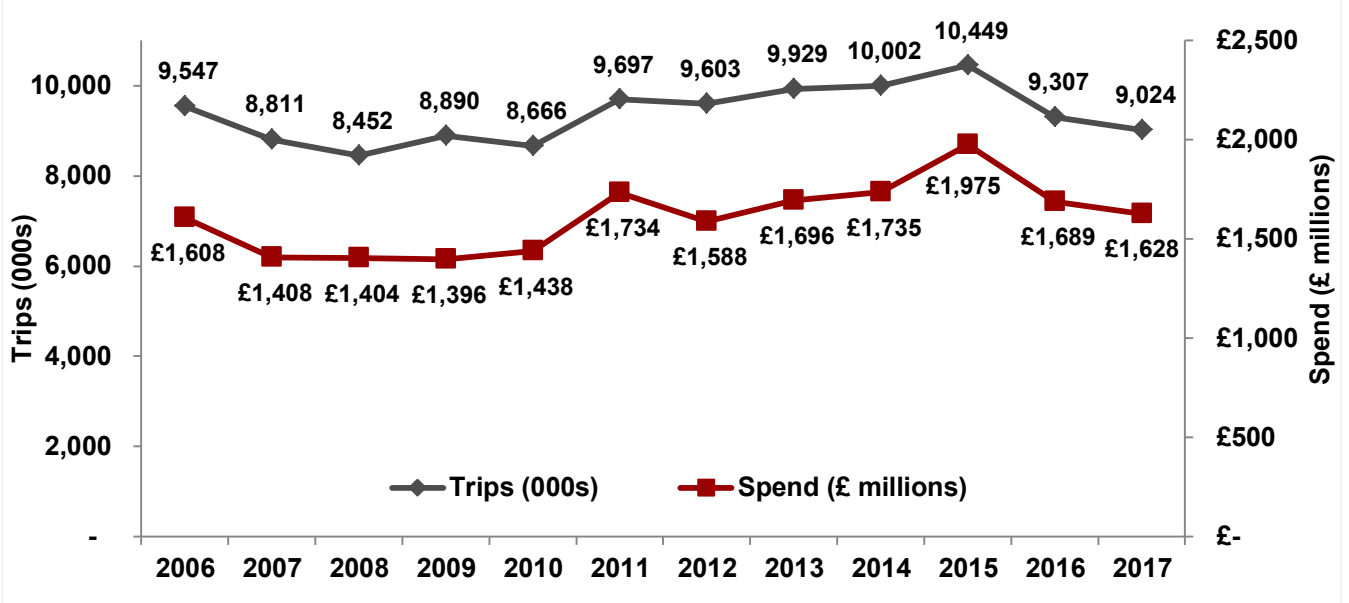
In the period January to December 2017, there has been a fall in overall volume of visits to Wales by GB residents with trips, nights and spend below the peak levels in 2013-2015.

Holiday trips to Wales partially recovered in 2017 following the fall in 2016. However, the volume of overnight domestic holiday trips to Wales of 5.7 million in 2017 is below the levels of above 6 million trips in 2013-2015. In comparison, the volume of overnight holidays taken across Great Britain grew by 6 per cent in 2017 to a record level of 59 million trips and £14.1 billion in spending.

The volume of visits to friends and relatives (VFR) continued to fall across GB in 2017, but the fall in volume of trips to Wales and spend fell more sharply in Wales during 2017.

Overnight domestic business trips to Wales fell in 2017, but there is a longer term trend of falling trip levels across GB as whole.

Figure 1.0 Trends in Overnight Trips (000s) and Spend (£ millions) in Wales by GB Residents



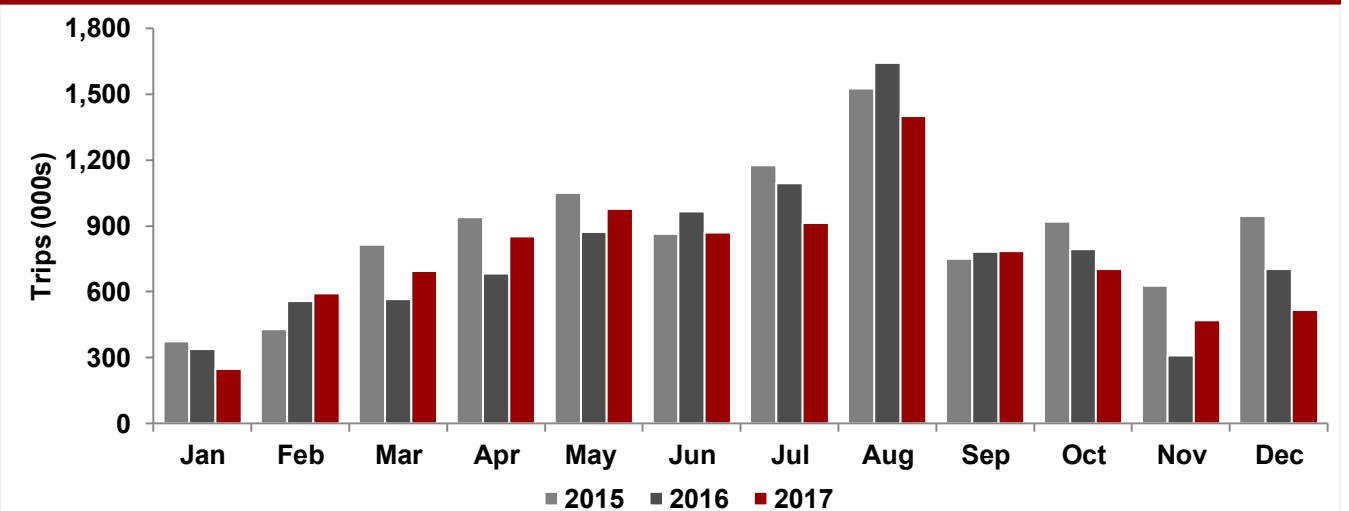
There was continuous growth in overnight trips and spend in Wales by GB residents between 2012 and 2015, with trip volumes peaking above 10 million in 2015. However, over the longer term, spending in real terms has fallen since 2006.

There was a fall in overnight trips and spend in 2016 which continued in 2017, driven by a range of factors including fewer visitors during the peak summer period in 2017 and reductions across all purposes of trip compared to 2015.

The average spend per trip by overnight visitors to Wales was slightly lower in 2017 at £180 compared to a slight increase across the whole of Great Britain which had an average spend per trip of £196. The average spend per trip on holidays taken in Wales during 2017 also fell.

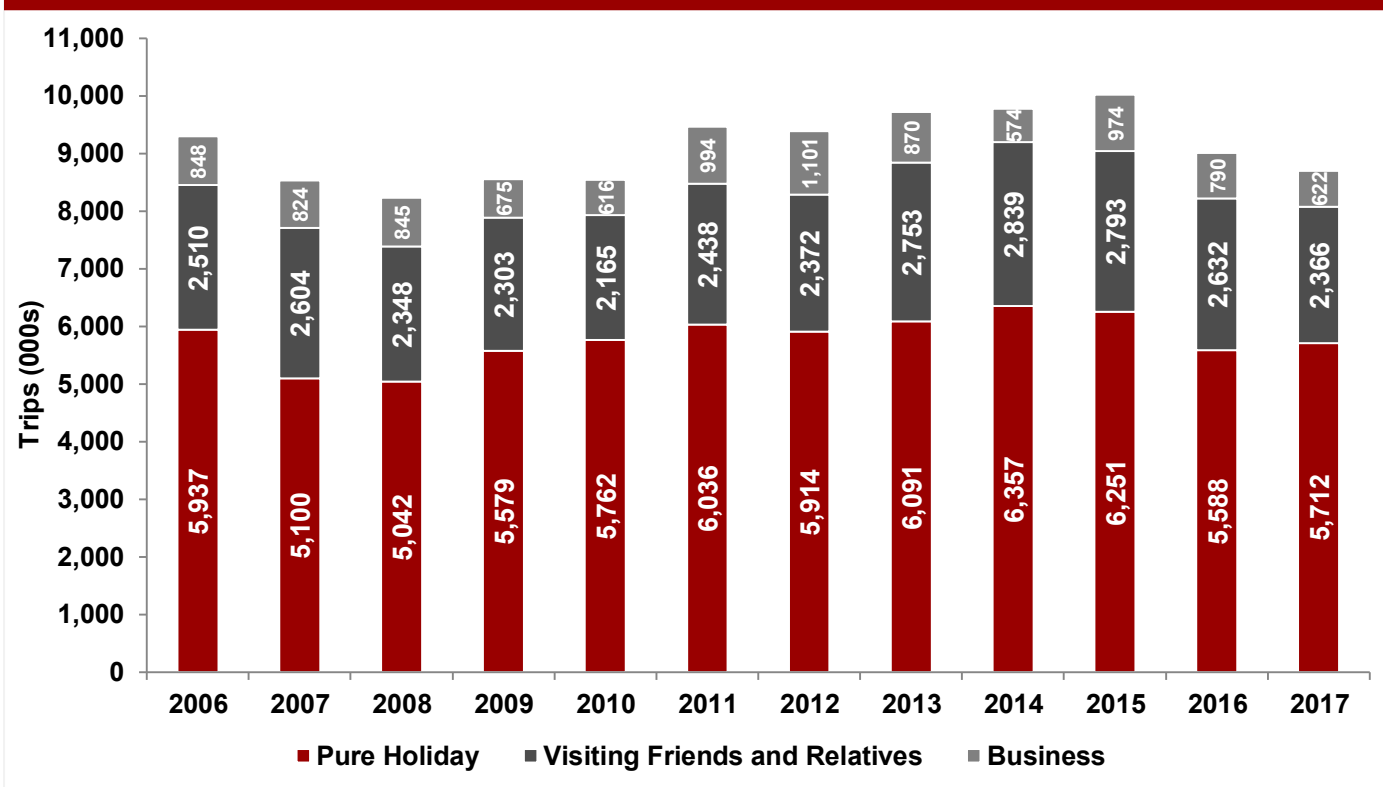
There was also a fall in average length of trip taken in Wales in 2017, decreasing from 3.54 nights to 3.43 nights. The fall in trip lengths has been most evident in overnight holiday trips, with an average of 3.67 nights stayed in Wales in 2017, which is part of a longer term trend towards shorter holidays across GB as a whole.

Figure 1.1 Volume of Monthly Overnight Trips taken in Wales by GB Residents



During 2017, the number of overnight trips taken in Wales were higher in March, April and May. However, trip levels were lower in the main summer months of June, July and August compared to 2016 and previous years. Trip levels were also lower than average between October to December 2017.

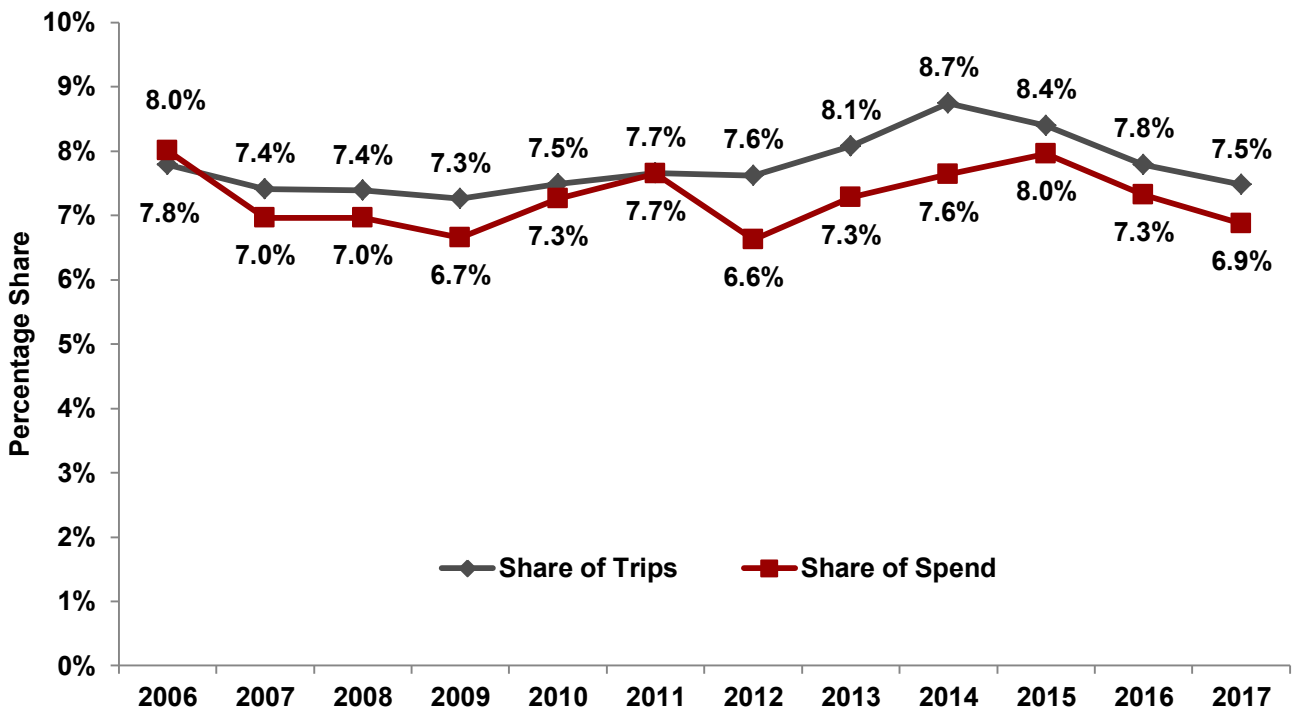
Figure 1.2 Overnight Trips by GB Residents to Wales by Purpose of Trip



Holiday trips to Wales peaked at around 6.3 million trips in 2014 and 2015. The volume of trips fell by 10 per cent in 2016, but there was recovery in 2017 to 5.7 million trips, 2 per cent higher than 2016. Overnight visits to friends and relatives (VFR) grew to around 2.8 million trips taken in Wales in 2013- 2015 but have fallen in the last 2 years to a level of 2.4 million trips in 2017 which is around the average level since 2006.

Overnight business trips to Wales by GB residents have fluctuated more widely during the last 10 years and peaked at around 1 million trips in 2011, 2012 and 2015. However, there has been a pattern of falling overnight business trips across GB and Wales during the last few years.

Figure 1.3 Wales Share (%) of Overnight Trips taken in Great Britain by GB Residents



Wales' share of overnight trips (any purpose) taken by GB residents fell in 2017 continuing the falling share of trips and spend over the last few years. However, the share of holiday trips taken in Wales in 2017 is higher at around 10 per cent but has decreased from the high points of 12 per cent in 2014 and 11 per cent in 2015. The share of trips to friends and relatives and overnight business trips has also fallen in 2017 to 5.7 per cent and 3.9 per cent respectively.

3. Domestic GB tourism day visits

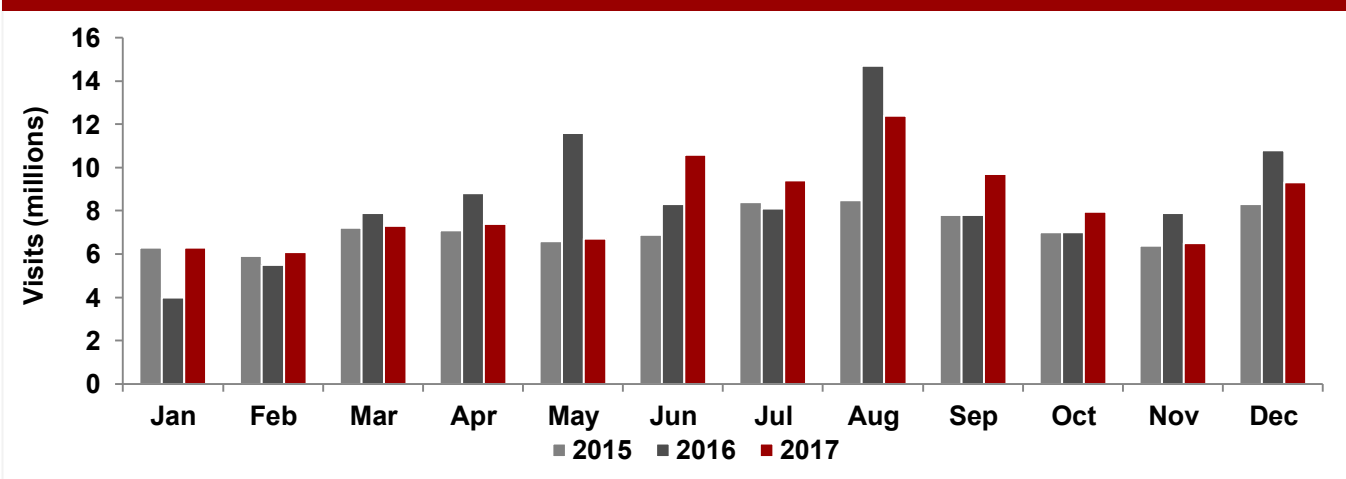
Table 1.2 Volume (millions) and Value (£ millions) of Domestic Day Visits by GB Residents - January to December 2017

Tourism Day Visits				
	Visits (millions)	% change from year before	Spend (£ millions)	% change from year before
Wales	99.70	-2.5	£4,332	+5.8
Great Britain	1,793.35	-2.2	£62,447	-2.3
Activities Core to Tourism Day Visits				
	Visits (millions)	% change from year before	Spend (£ millions)	% change from year before
Wales	32.04	-2.2	£894	-20.6
Great Britain	540.32	-1.3	£16,163	-3.7

There were just under 100 million Tourism Day visits taken in Wales between January and December 2017. This was slightly lower than in 2016 and there was a similar small reduction in Tourism Day visits taken across Great Britain as a whole. In contrast, there was an increase in spend on Tourism Day visits taken in Wales in 2017 reaching £4.3 billion, the highest level since 2012. The higher overall spend was due to an increase in spending on Tourism Day visits, reaching an average of £43 spend per visit, the highest level recorded for Wales.

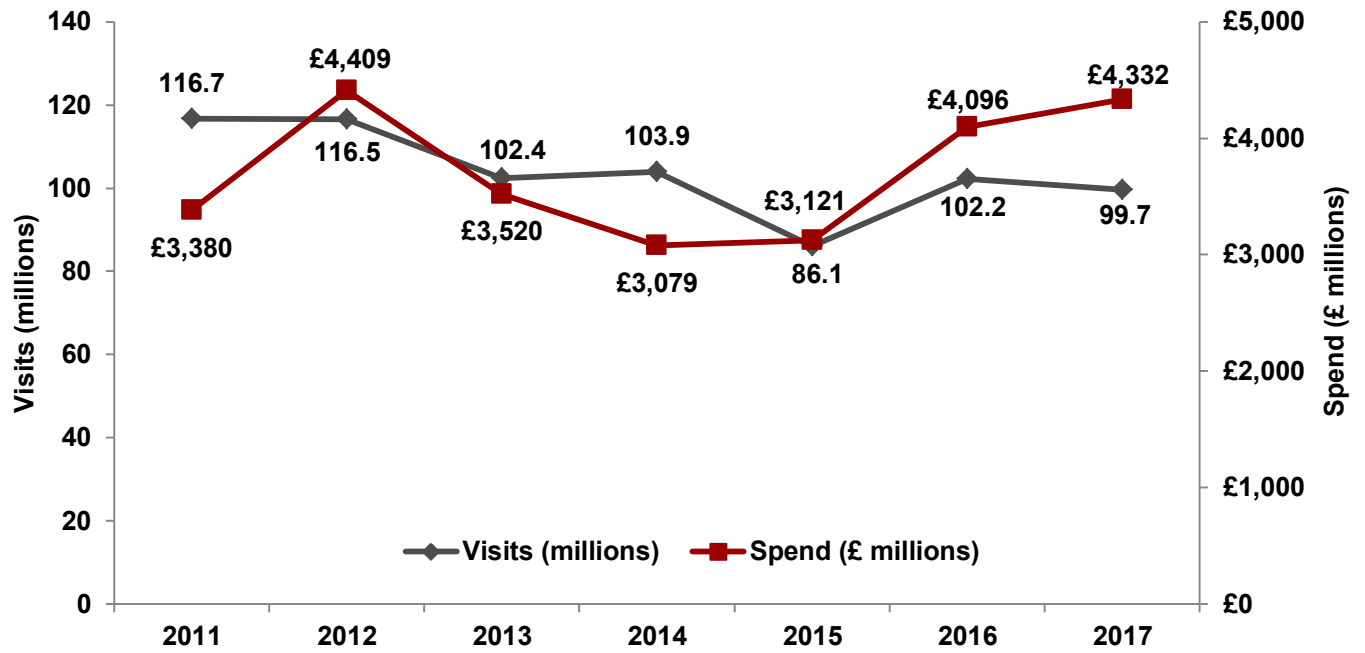
Activities Core to Tourism (ACT) day visits are a subset of Tourism Day visits where the main activity is going out for entertainment, watching live sports, trips to visitor attractions, going to special public events, undertaking outdoor leisure activities or going on general days out. In 2017, Activities Core to Tourism made up 32 per cent of all tourism day visits taken in Wales and there was a similar reduction in visit levels across both types of day visits taken in 2017.

Figure 1.4 Volume (millions) of Monthly Tourism Day Visits taken in Wales by GB Residents



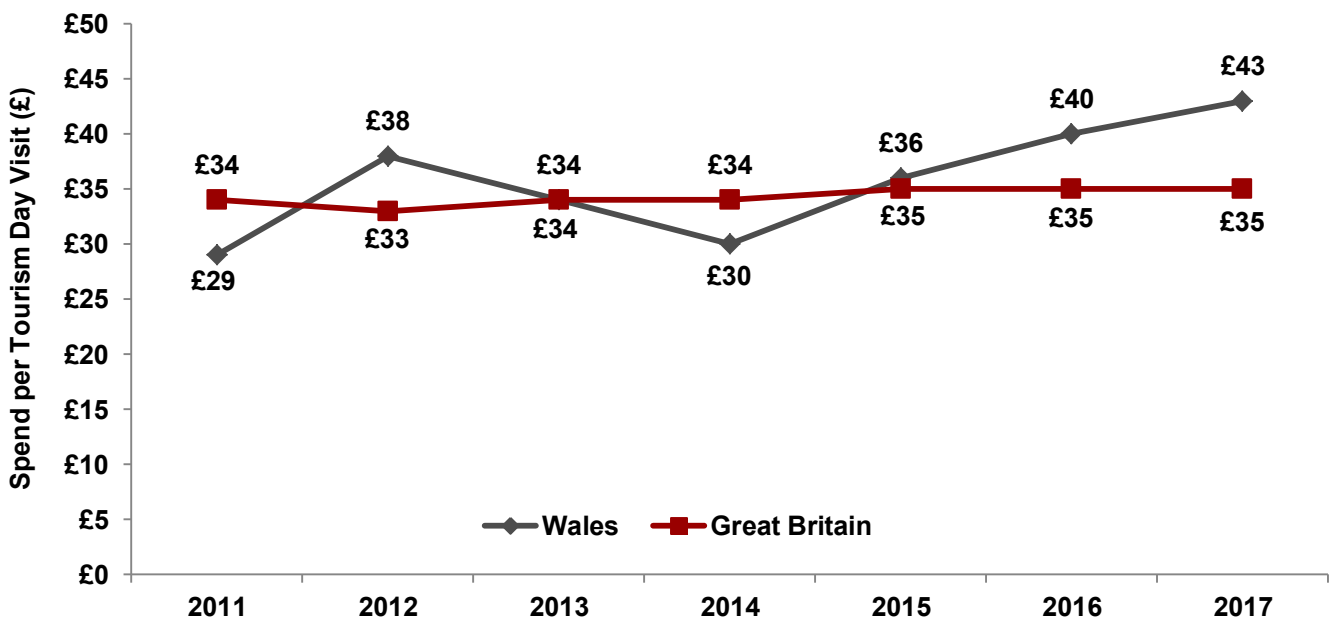
During 2017 there were annual increases in the volume of Tourism Day visits taken in Wales during January, February, June, July, September and October. The volume of visits in June and September were notably above the average visit levels since 2011.

Figure 1.5 Trends in Volume (millions) and Value (£ millions) of Tourism Day Visits taken in Wales by GB Residents



The volume of Tourism Day visits taken in Wales fell between 2011 and 2015. There has been a partial recovery in the volume of visits taken in 2016 and 2017. The spend generated by Tourism Day visits taken in Wales has fluctuated broadly in line with changes in the volume of visits but the average spend per Tourism Day visit has been increasing over the last 3 years.

Figure 1.6 Average Annual Spend (£) per Tourism Day Visit taken in Wales and Great Britain



4. International visits (r)

(r) Please note that all of the results reported in this section for International Visitors have been revised to cover the full year January to December 2017.

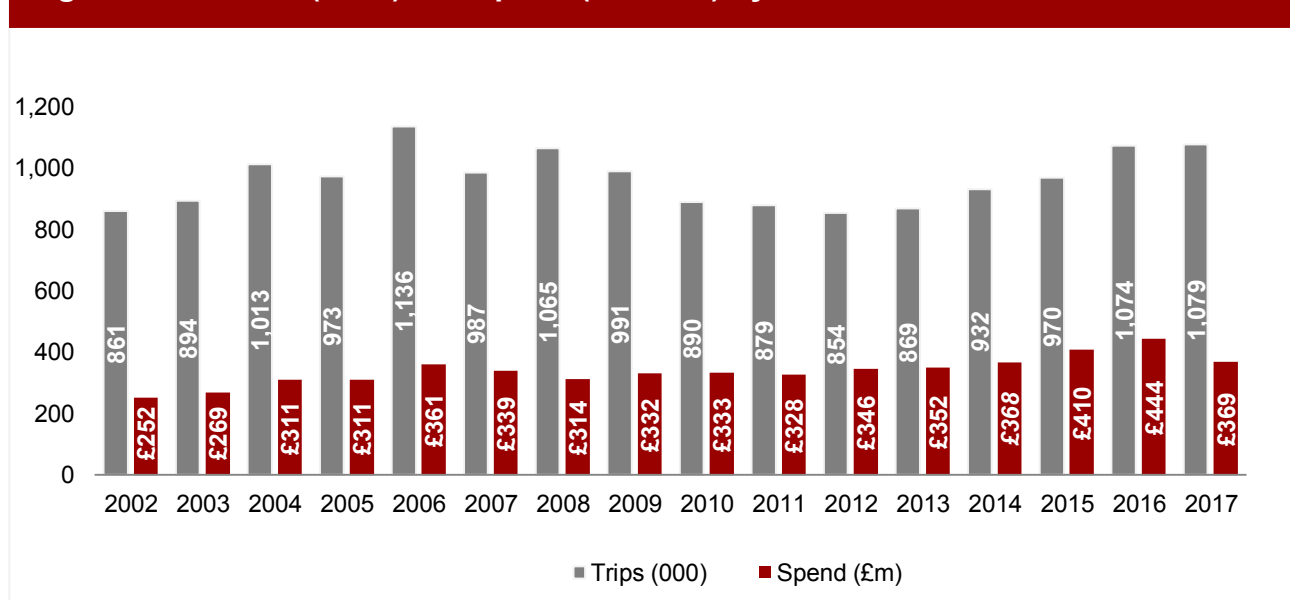
Table 1.3 Volume (000s) and Value (£ millions) of Inbound International Visitors - January to December 2017

	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, led by strong growth from North America 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.

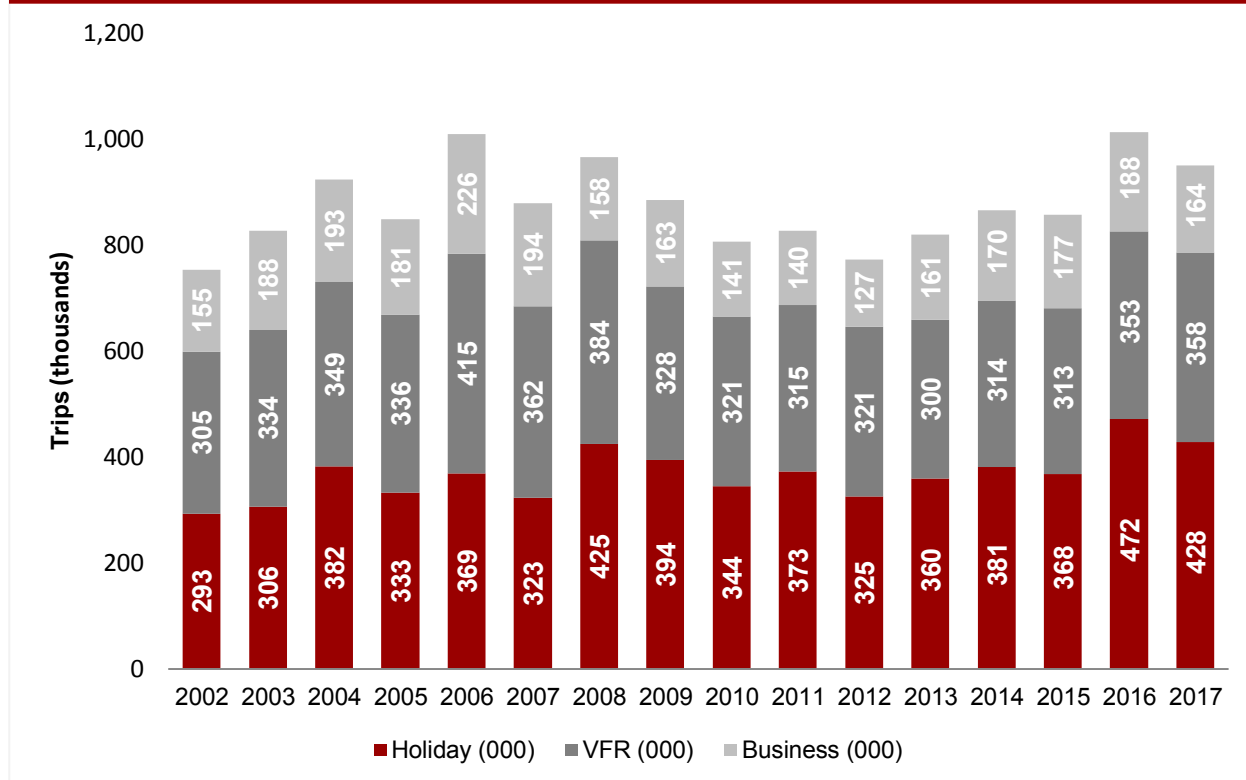
All regions across the UK have experienced increases in the volume of international trips, with Scotland and London performing strongly. There was growth in trips to Wales of 0.5 per cent during 2017 compared to the previous year. However, spend in Wales during the same period decreased by 17 per cent,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

Figure 1.7 volume (000s) and spend (millions) by International Visitors to Wales



As seen in Figure 1.7 the volume of trips taken in Wales by international visitors remained above 1 million visits increased during 2017. However, spend during 2017 fell to £369, lower than the previous two years.

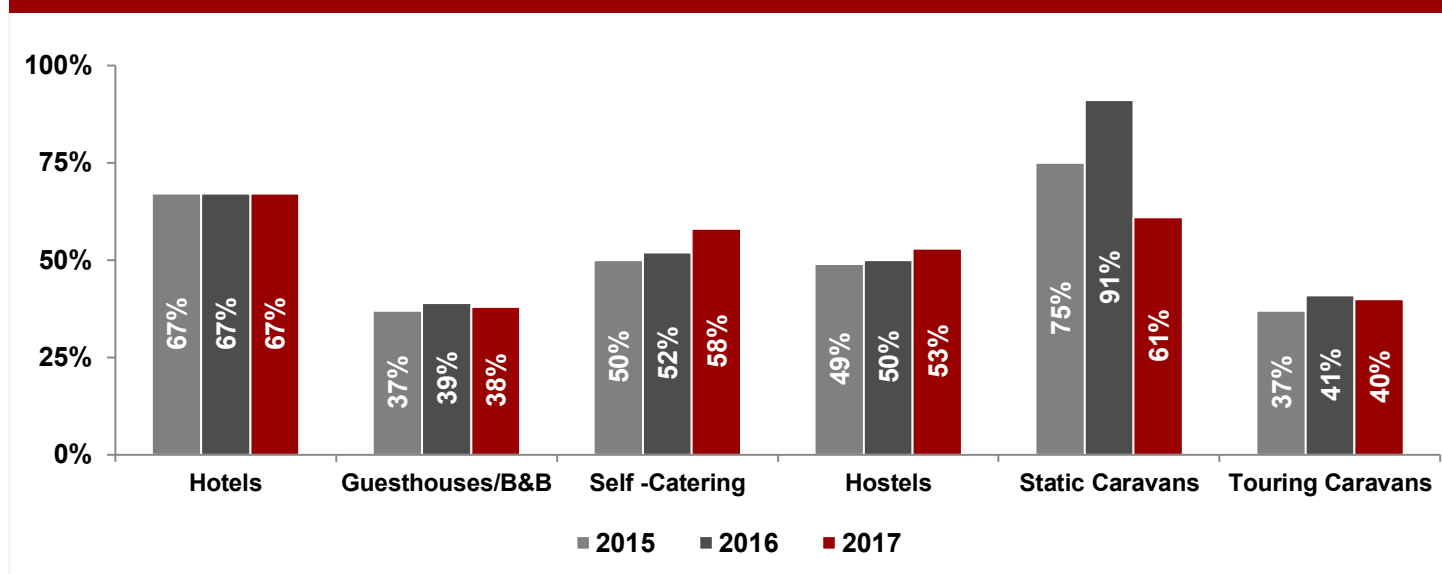
Figure 1.8 Volume of trips to Wales (thousands) by International Visitors by Main Purpose of Visit



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 purpose (e.g. attending sporting events).

5. Accommodation occupancy rates

Figure 1.9 Average Annual Occupancy Rates (%) in Wales by Type of Accommodation



During 2017, there were increases in average annual occupancy levels for self-catering and hostel accommodation, reaching their highest levels since 2010.

Hotel room occupancy rates remained level at 67 per cent which is the highest level since 2010.

Room occupancy levels for guesthouses and bed and breakfast establishments decreased by one percentage point in 2017, but they were still above the average rate since 2010.

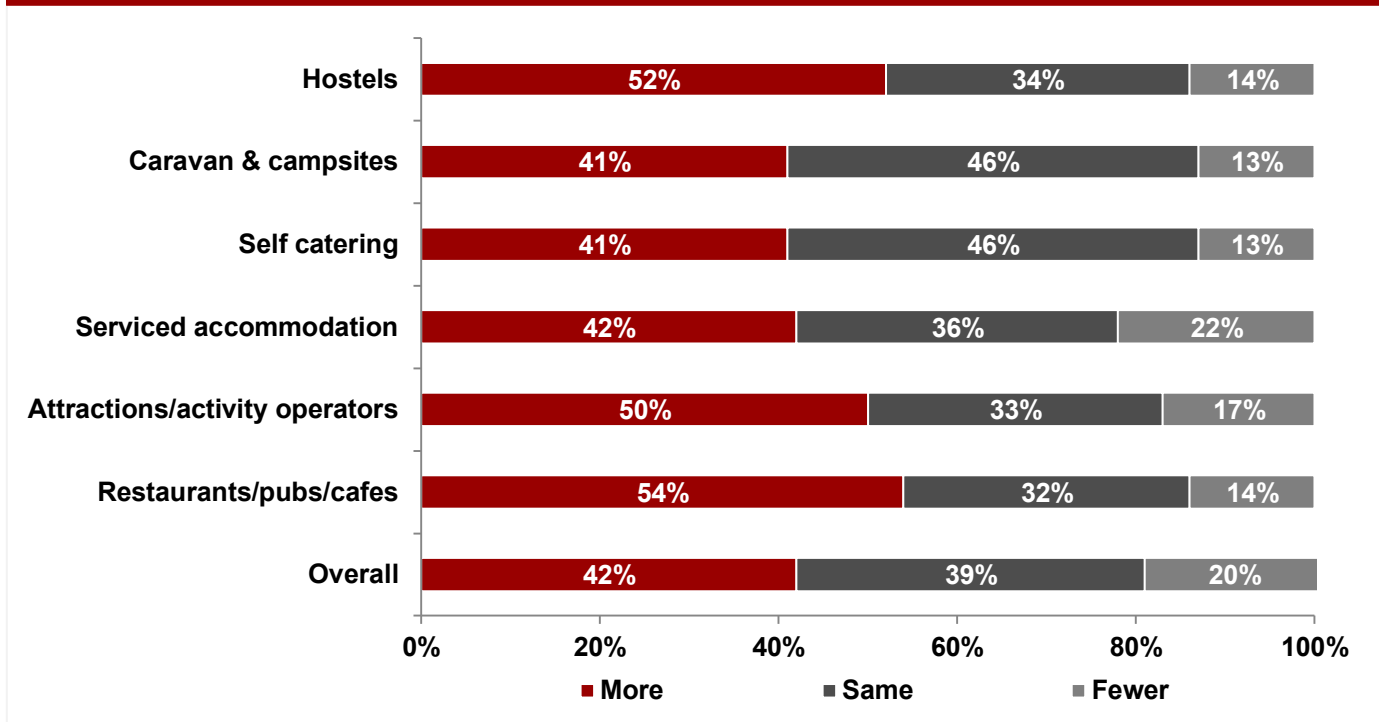
Touring caravan pitch occupancy rates also decreased by one percentage point in 2017, but the average seasonal occupancy rate of 40 per cent between May and October was slightly above the average since 2010.

The seasonal average occupancy for caravan holiday homes fell considerably during 2017, down 30 percentage points on levels in 2016. However, this can be attributed in part to the non-participation of two large operators who had previously supplied data in 2016 but not in 2017.

6. 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. The findings below are based on the results from the survey carried out in November 2017.

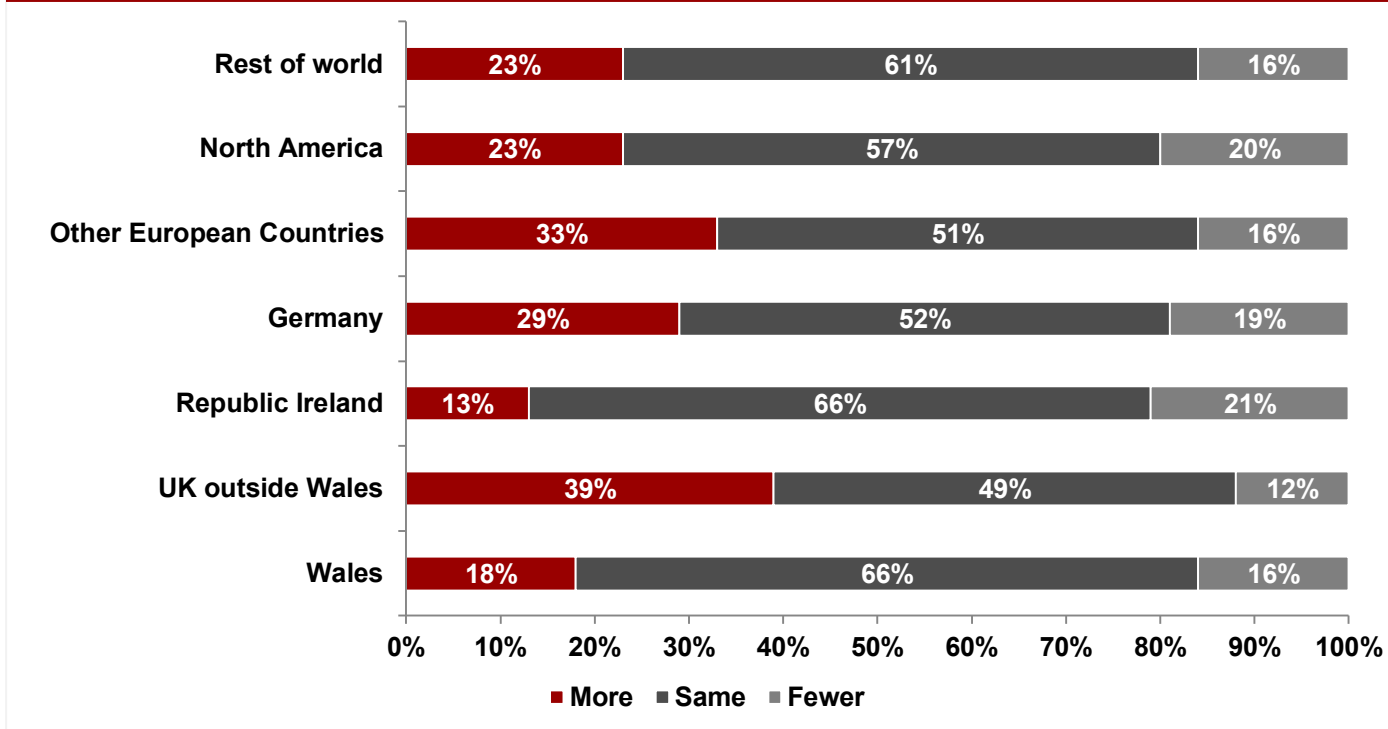
Figure 2.0 Compared with last year, how many visitors have you had to date this year? - Tourism Business Barometer November 2017



The findings from the Barometer Survey in November 2017 indicated strong visitor levels with 42 per cent of businesses stating they had more visitors than 2016 and a similar proportion stating they had the same level.

A higher proportion of Attractions, Activity and Food and Drink providers reported increased visitor levels. A slightly lower proportion of businesses reported increases in profitability with 39 per cent reporting that profitability increased in 2017 and 37 per cent reported the same level of profitability. Serviced and Self Catering accommodation providers were more likely to report lower levels of profitability in 2017, indicating a squeeze in visitor spending and profit margins effecting these sectors.

Figure 2.1 How is the level of business to date this year from each of the following markets compared to the same period last year? - Tourism Business Barometer November 2017



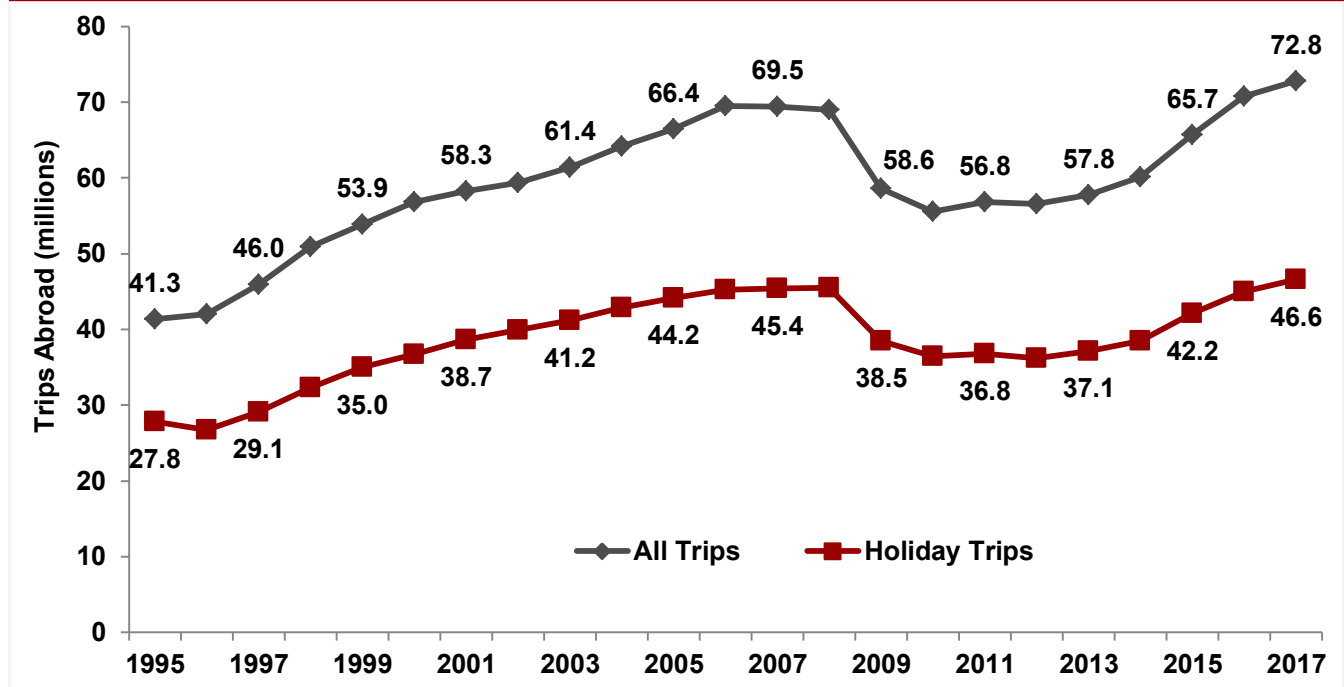
The Business Barometer in November 2017 reported strongest growth in visitors from people living in the UK outside of Wales. The number of visitors reported from Wales was notably lower and corresponds with the findings from the Great Britain Tourism Survey.

Around a third of businesses reported an increase in visitor levels from Germany and other European countries. Businesses were more likely to report lower level of visitors from Ireland and the same or lower level of visitors from North America and the Rest of the World.

7. Overseas travel by UK residents

The results reported in this section have been revised to reflect the final published data for 2017.

Figure 2.2 Trends in Volume of Trips (millions) taken Overseas 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 72.8 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.

8. Outlook

The prospects for 2018 will be impacted by economic conditions including a continued squeeze on earnings and spending by UK residents. The weaker value of sterling will continue to make the UK more attractive for inbound international visitors and to make travel abroad more expensive for UK residents.

Visit Britain forecast for 2018 is for 41.7 million visits, an increase of 4.4 per cent on 2017 and £26.9 billion in visitor spending, an increase of 6.8 per cent on 2017.

The most recent tourism industry barometer undertaken immediately after the Easter holiday period in 2018, reported that visitor levels at the start of the year had been impacted by poor weather with 40 per cent of businesses in the sample reporting lower levels of business compared with Easter 2017 and 42 per cent reporting the same level of visitors. The better weather over the May bank holiday 2018 and during the rest of May is likely to have helped boost visitor numbers.

Despite challenging economic conditions, the latest findings from the Visit Wales Brand and Marketing Tracker indicate that around one in four people surveyed at the start of 2018 stated that they are likely to take more holidays in the UK in the next 12 months. This figure is more than double the amount who claim that they will take fewer holidays. A further two thirds state they will take about the same level of domestic holidays and a small minority of less than 10 per cent say they will take fewer domestic holidays over the next 12 months.

The survey indicates that intentions for holidays abroad are weaker with the same proportion saying they will take fewer or more holidays in Europe and more people stating they will take fewer holidays to the rest of the world over the next 12 months.

The main reasons for people considering taking more UK holidays this year are general affordability and financial reasons, including the exchange rate, as well as the ease and convenience of holidaying in the UK and the ability to decide to visit at the last minute.

9. 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 our [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 2017 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 our [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 our [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 August 2018 (final date to be confirmed) and will include statistics for the period January to March 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 tourismresearch@gov.wales

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