

## Wales tourism performance, January to September 2019

6 February 2020  
SFR 5/2020

This report presents the results from the main official tourism surveys for Wales covering the period January to September 2019. Data is reported for the combined 9 months from January to September 2019 as well as totals for the 12 months ending September 2019. Details of each survey including links to further information are 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 9 months of 2019 compared with 2018: an increase of 4.8 per cent to 8.503 million in terms of trips and an increase of 7.9 per cent to £1,660 million in related spend. The corresponding figures at GB level show smaller increases of 3 per cent and 2.3 per cent respectively.
- Over the 12 months ending September 2019, there were 10.415 million overnight trips to Wales, up by 6.3 per cent compared with the 12 months ending in September 2018. The expenditure at £1,973 million was also up by 9.2 per cent.
- In comparison, the volume of overnight trips taken across GB as a whole and related expenditure showed small increases in terms of visitor numbers and spend in the last 12 months with trip volumes at 121.259 million in the 12 months ending September 2019, which is an increase of 0.1 per cent from the previous 12 months.
- For both Wales and GB as a whole the number of visits and total expenditure increased but the number of nights fell - indicating that visitors take shorter overnight stays but spend more while they are there.

### 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**

- In the first 9 months of 2019, there were 65.4 million day visits to destinations in Wales, down 13 per cent on the same time in 2018. Related spend (£2,647 million) was down by 16 per cent. The corresponding figures at GB level were down 3 per cent on trips, but up by 3 per cent in terms of spend.
- In the 12 months ending in September 2019, day trips to Wales (86.1 million) were down by 13 per cent and related spend (£3,497 million) was 17 per cent down. The corresponding figures at GB level showed a decrease on trips of 3 per cent, but an increase of 2 per cent on related spend.

### **International visitors**

- The number of international trips to Wales during the first 9 months of 2019, increased by 4 per cent year on year to 820,000. Visitor spending was £358 million, which was a 12 per cent increase on the same time last year. *(This expenditure figure however included one particular outlying figure with high value).*

### **Accommodation occupancy**

- For the serviced accommodation types, there was a mixed picture. Hotels saw a slight fall in occupancy rates compared with the first 9 months of last year to 67 per cent (from 68 last year), but Guest Houses and B&Bs saw an increase to 40 per cent (from 38 last year). Hostels were up slightly year on year to 55 per cent in 2019 compared to the 54 per cent of the same time last year.
- Self-catering accommodation was 61 per cent compared to 59 per cent last year.
- The April to September average for caravan holiday homes was 91 per cent compared to 90 per cent last year, and occupancy for Touring caravan and camping parks was slightly down from last year with 42 per cent in April to September 2019 compared to 46 per cent in 2018.

### **Business performance**

- Wave 4 of the Tourism Barometer, undertaken in November 2019 following the autumn half term holiday, indicates that 73 per cent of businesses reported a greater (27 per cent of businesses) or equal (46 per cent of businesses) level of visitors compared with the corresponding period in 2018.

## 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: Great Britain Tourism Survey

Trips taken in Wales				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	8.503	+4.8	10.415	+6.3
Nights	28.953	-3.8	34.508	-1.7
Spend (£)	£1,660	+7.9	£1,973	+9.2
Trips taken in Great Britain				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	93.668	+3.0	121.259	+0.1
Nights	283.943	-3.0	363.092	-3.9
Spend (£)	£19,351	+2.3	£24,405	+0.7

In the 12 months ending September 2019, there were 10.415 million overnight trips to Wales by GB residents, which is a 6.3 per cent increase on the total for the previous 12 months. For the 12 months ending September 2019, there was a total expenditure of £1,973 million, an increase of 9.2 per cent compared to the 12 months ending September 2018. The number of nights however saw a decrease of 1.7 per cent, which indicates that visitors take shorter overnight stays but spend more while they are here.

The level of both trips and spending in Wales have grown during the first nine months of 2019, compared to the same time last year, but number of nights have decreased by 3.9 per cent. Figure 1.0 below shows that during 2019, every month apart from June and July performed better than the same month in 2018.

In comparison, the volume of overnight trips taken across GB as a whole and related expenditure have shown a modest increase in the levels of visitor numbers and spend in the last 12 months with 121.259 million trips in the 12 months ending September 2019, which is 0.1 per cent up compared to the previous 12 months and a 0.7 per cent increase in spend.

Figure 1.0 shows the monthly volume of overnight trips taken in Wales over the last 4 years. The 2019 data shows that the number of visitors in the 'shoulder' season – before and after the summer holiday period was higher than the previous years.

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

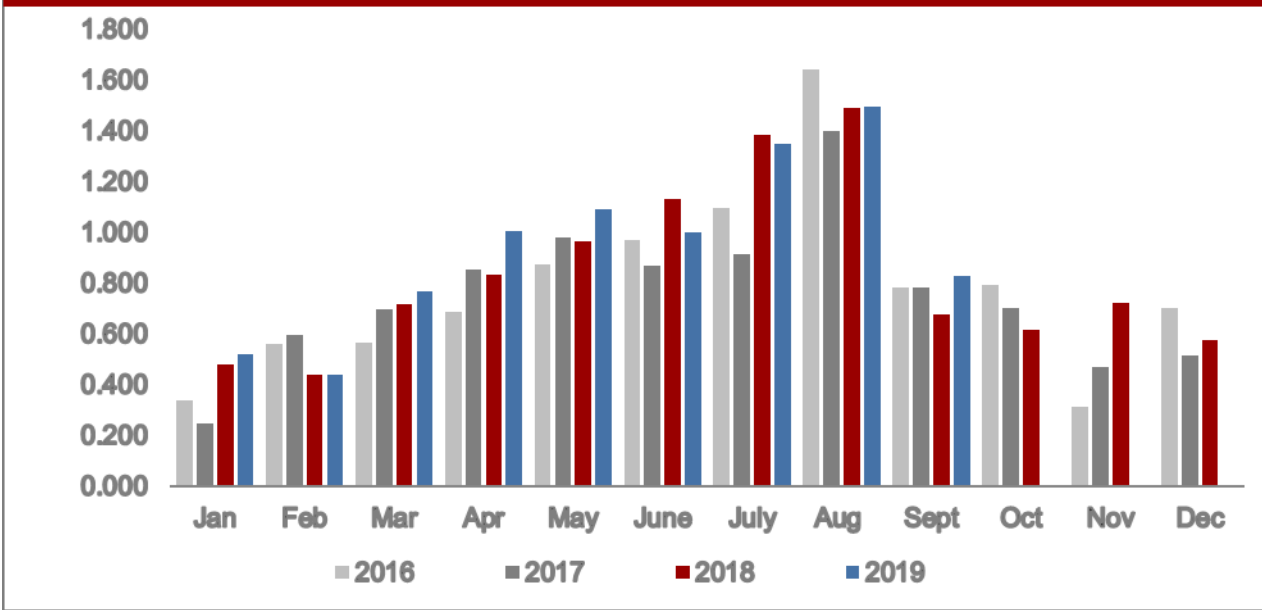
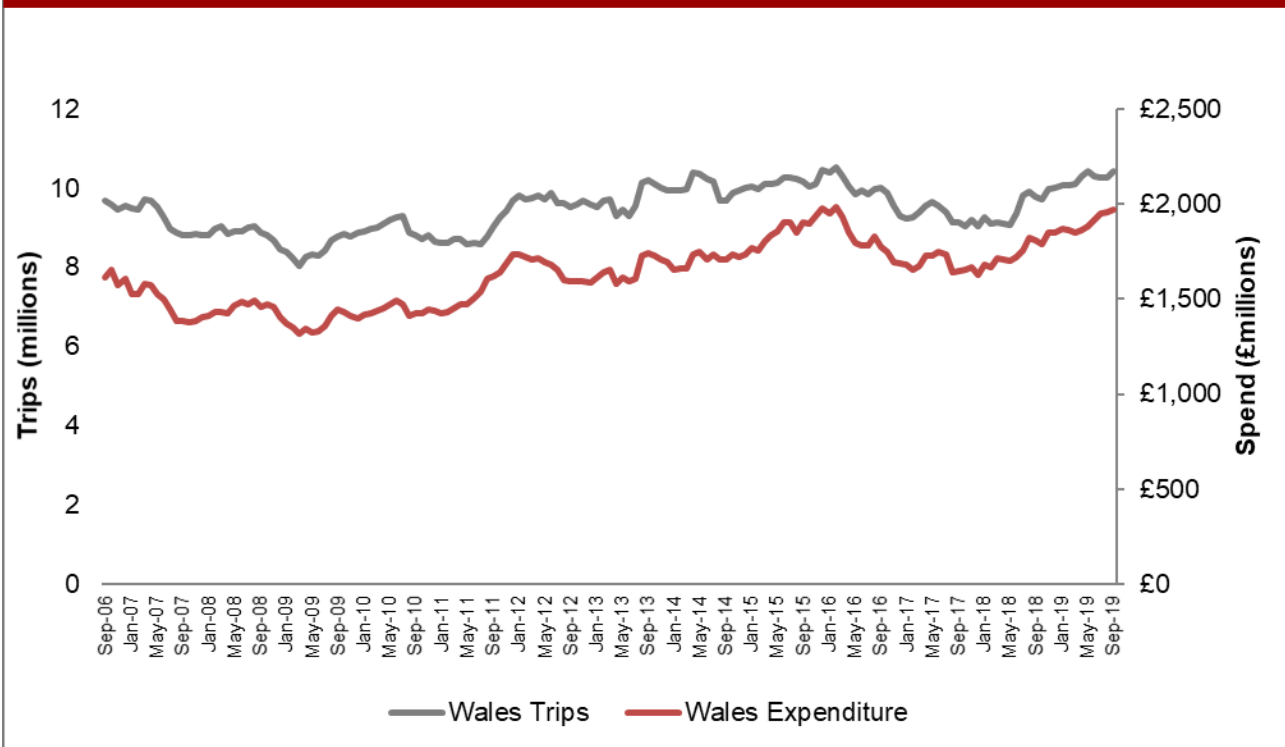


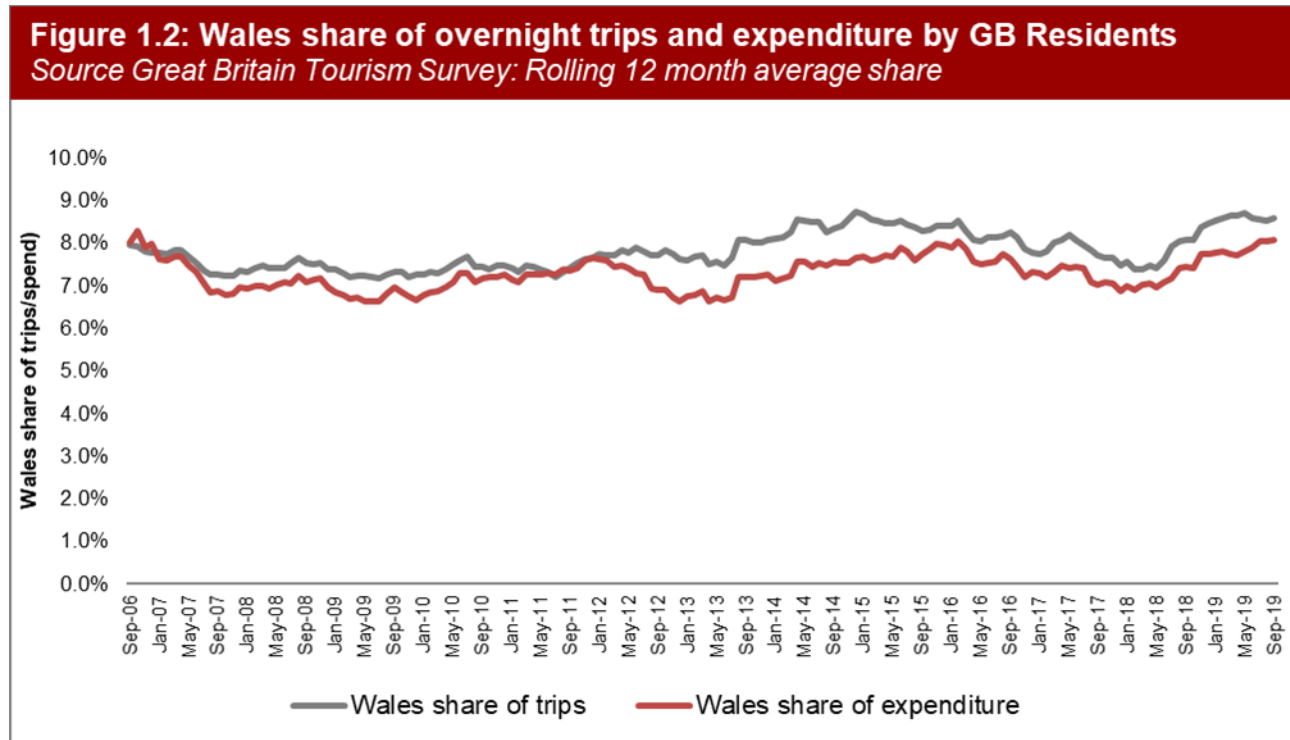
Figure 1.1 shows that the 12 month rolling totals of trips and spend to Wales peaked in early 2016 with around 10.5 million annual trips and £1,985 million in expenditure. There was a fall in trips taken in Wales during 2017. However during the last year both spend and visitor levels have picked up and are now approaching the levels last seen in 2016.

**Figure 1.1: Trends in Overnight Trips and Expenditure in Wales by GB Residents**  
 Source Great Britain Tourism Survey: 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 September 2019 to 8.6 per cent compared to 8.1 per cent for the 12 months ending September 2018. The average share of spend has continued to rise and is 8.1 per cent in September 2019 compared to 7.5 per cent for the 12 months ending September 2018.



## Overnight holidays

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

*Source: Great Britain Tourism Survey*

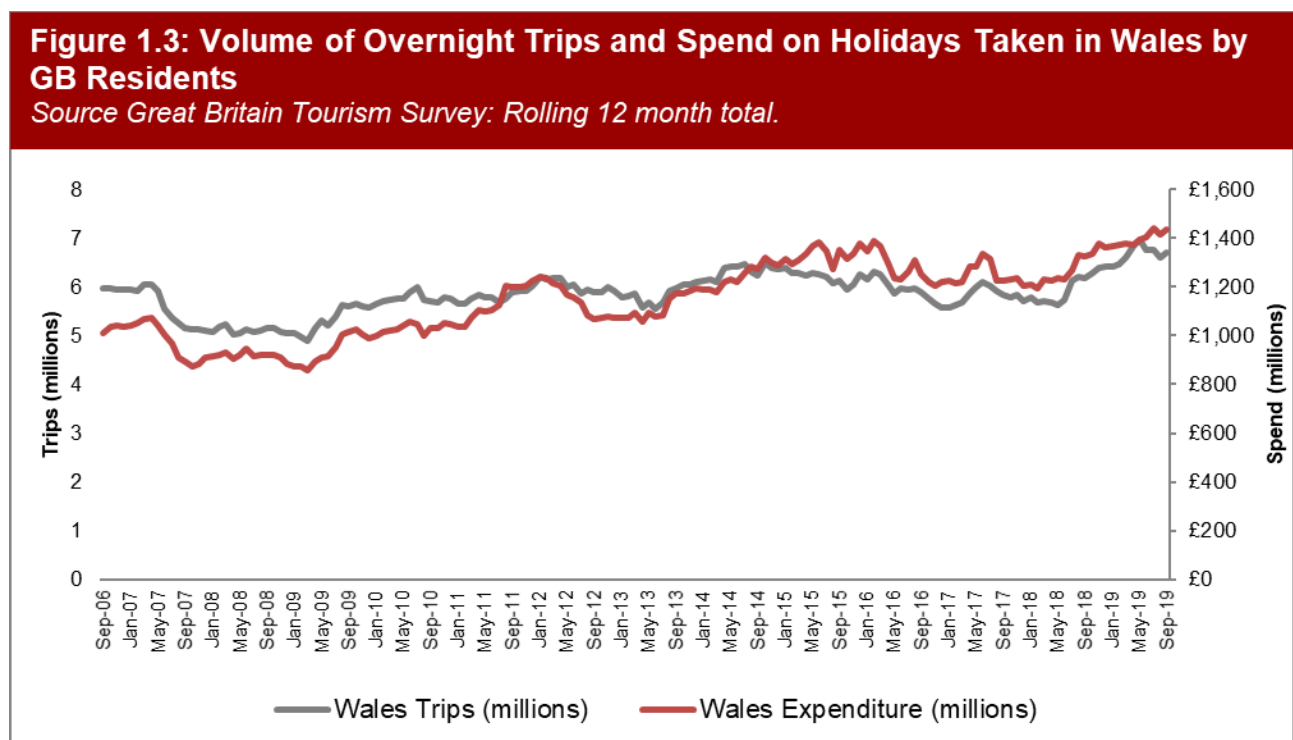
Holiday Trips taken in Wales				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	5.718	+5.5	6.708	+8.4
Nights	20.210	-6.4	23.100	-4.0
Spend (£)	£1,235	+6.4	£1,437	+8.3
Holiday Trips taken in Great Britain				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	48.914	+3.7	59.634	+1.3
Nights	165.272	-2.7	195.606	-3.9
Spend (£)	£11,812	+0.2	£14,312	-1.3

In the 12 months ending September 2019, there were a total of 6.708 million overnight holiday trips to Wales by GB residents which is an increase of 8.4 per cent on the total for the previous 12 months. For the 12 months ending September 2019, there was related expenditure of £1,437 million, an increase of 8.3 per cent compared to the 12 months ending September 2018.

The volume of holiday trips and spend in Wales have both grown during the first nine months of 2019, but with reductions in the number of nights taken on holiday.

Figure 1.3 shows that the 12 month rolling total of holiday trips taken in Wales previously 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 months of 2018 the trip levels have increased to above the 2014 level, a trend which continues into 2019. The chart shows that the volume of expenditure roughly follows the volume of visits over time.

In comparison, the volume of overnight trips taken across GB as a whole have shown a 1.3 percent increase in the last 12 months with trip volumes of 59.6 million in the 12 months up to September 2019 but have seen a reduction in spend of 1.3 per cent.



## Visits to friends and relatives

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

Source: Great Britain Tourism Survey

VFR Trips taken in Wales				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	2.067	+14.9	2.744	+10.6
Nights	6.769	+16.6	8.732	+11.5
Spend (£)	£232	+5.0	£302	+9.8
VFR Trips taken in Great Britain				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	29.374	+2.0	41.631	0.0
Nights	81.801	-3.9	119.255	-4.7
Spend (£)	£3,508	+4.0	£4,841	+2.9

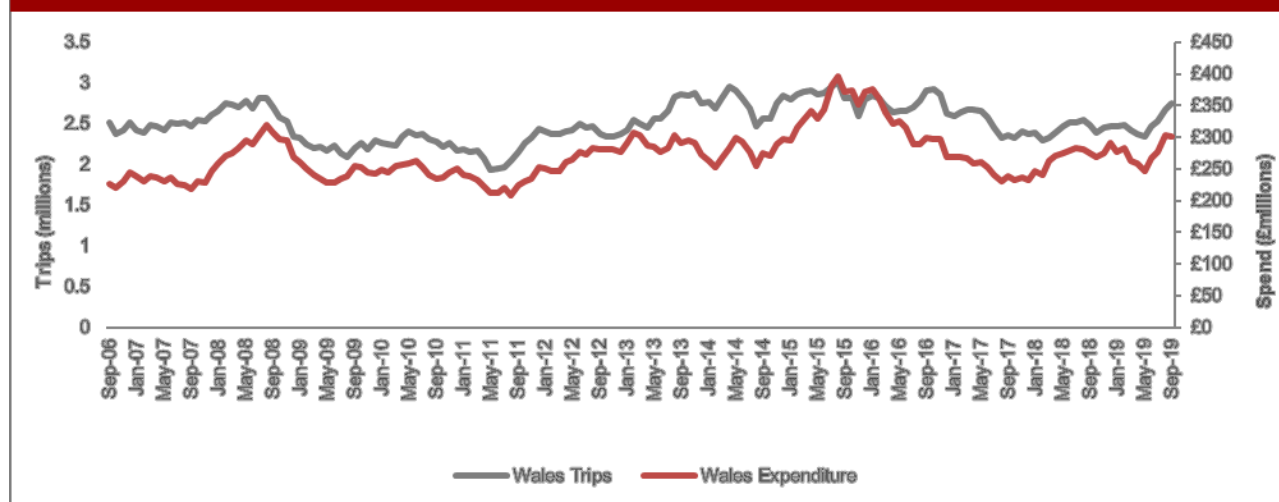
In the 12 months ending September 2019, there were a total of 2.744 million overnight visits to friends and relatives in Wales by GB residents, which is an increase of 10.6 per cent on the total for the previous 12 months. For the 12 months ending September 2019, there was a related expenditure of £302 million, up by 9.8 percent compared to this time the previous year and number of nights also increased by 11.5 per cent.

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 the 12 month total in 2015 with 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 VFR trip levels taken in Wales are still slightly below their previous peak, but up by 10.6 per cent compared to September 2018.

In comparison, the level of overnight visits to friends and relatives across GB has been static in the 12 months ending September 2019 compared to same time last year.

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

Source Great Britain Tourism Survey: 12 month rolling totals





## Business visits

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

Source: Great Britain Tourism Survey

Business visits taken in Wales				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	0.547	-22.4	0.669	-21.6
Nights	1.500	-12.4	1.746	-14.2
Spend (£)	£136	+0.7	£158	-4.8
Business Visits taken in Great Britain				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	12.785	+3.9	16.749	-3.5
Nights	28.864	-0.6	38.778	-1.9
Spend (£)	£3,548	+8.7	£4,656	+4.8

In the 12 months ending September 2019, there were a total of 0.669 million overnight business trips taken in Wales by GB residents which is a fall of 21.6 per cent on the total for the previous 12 months. For the 12 months ending September 2019, there was a decrease in expenditure to £158 million, a fall of 4.8 per cent compared to the 12 months ending September 2018.

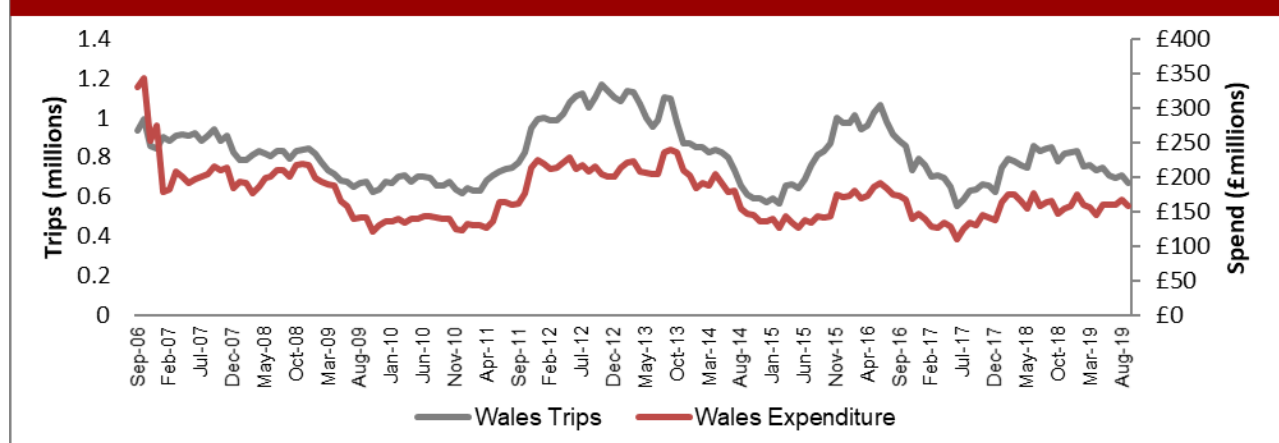
There was a decrease in the volume of trips during the first nine months of 2019, but a slight increase in expenditure.

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. Annual trip volumes also reached over 1 million in 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, but the average 2019 levels have fallen.

In comparison, there has also 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 19 million annual trips in 2012 to the current volume of 16.7 million trips taken in the 12 months ending September 2019.

**Figure 1.5: Volume of trips and Expenditure on Overnight Business trips to Wales by GB residents**

Source: Great Britain Tourism Survey 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: Great Britain Day Visits Survey

Tourism Day Visits taken in Wales				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	65.4	-13	86.1	-13
Spend (£)	£2,647	-16	£3,497	-17
Tourism Day Visits taken in Great Britain				
	Jan to Sept 2019 (millions)	% change from year before	12 month total ending Sept 2019 (millions)	% change from year before
Trips	1,253.8	-3	1,671.1	-3
Spend (£)	£49,164	+3	£65,374	+2

In the 12 months ending September 2019, there were 86.1 million tourism day visits taken in Wales by GB residents, which is a decrease of 13 per cent on the total for the previous 12 months. For the 12 months ending September 2019, there was an expenditure of £3,497 million, a decrease of 17 per cent compared to the 12 months ending September 2018.

Figure 2.0 shows the monthly volume of tourism day visits to Wales since 2016. The day visitor numbers vary from month to month and are generally more weather dependent than overnight visitor numbers.

**Figure 2.0: Monthly Volume of Tourism Day Visits taken in Wales**  
Source: Great Britain Day Visits Survey

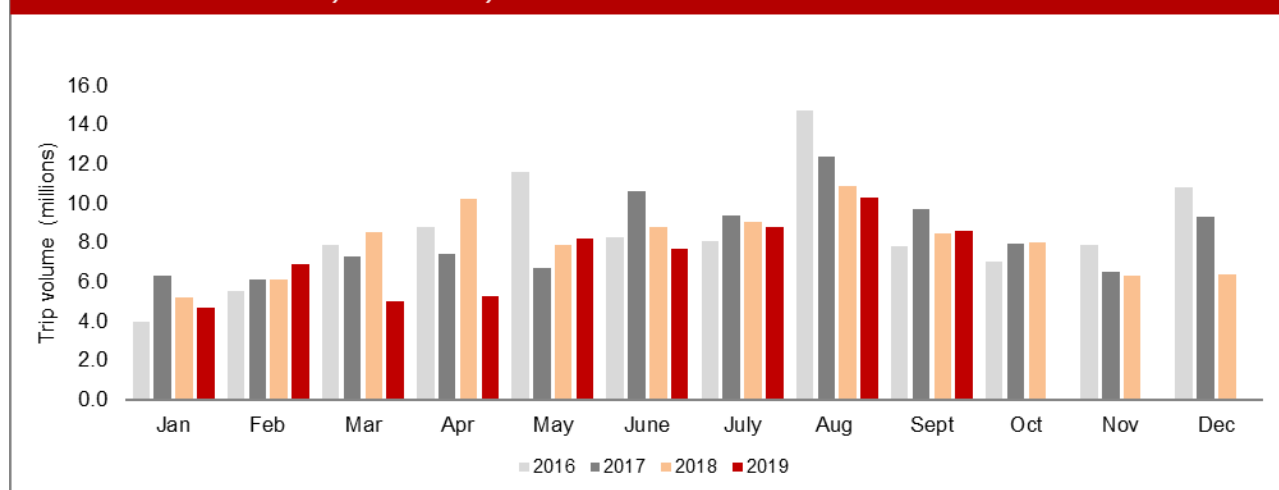
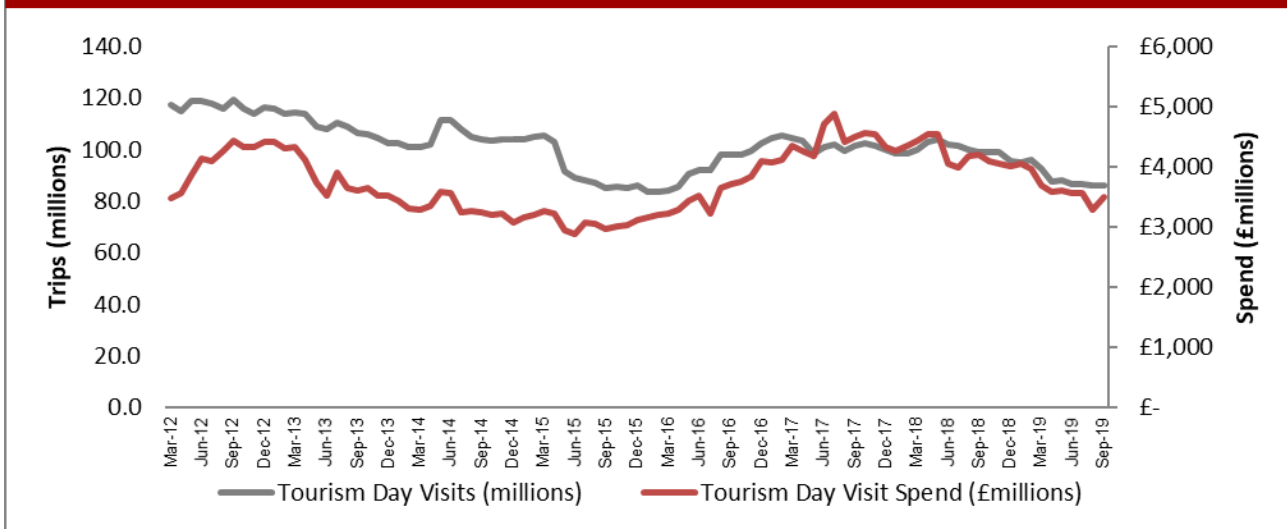


Figure 2.1 shows that tourism day visits taken in Wales by GB residents fell from a level of almost 118 million annual trips in 2012 to 83 million trips in 2016, but then trip volumes increased to over 100 million annual trips in early 2018, but have now fallen to their current level of 86 million trips. Expenditure on tourism day visits taken in Wales has followed a similar pattern to the volume of visits.

Tourism day visits across Great Britain as a whole have also fallen from a peak level in 2013 of 1,951 million annual trips to 1,671 million annual trips in the period ending September 2019.

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

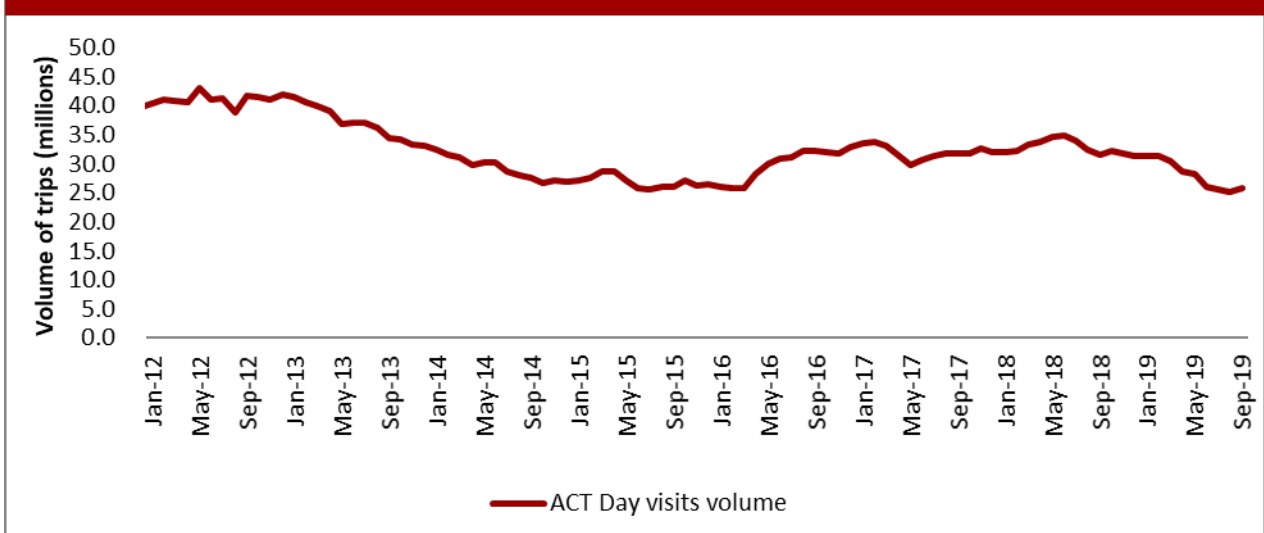
Source: Great Britain Day Visits Survey 12 month rolling total



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 September 2019, there were 25.8 million day visits taken in Wales that involved Activities Core to Tourism. This was a decrease of 18 per cent compared to the total of 31.6 million trips in the 12 months ending September 2018. Over the last 12 months day visits including Activities Core to Tourism comprised an average of 30 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: Great Britain Day Visits Survey 12 month rolling total



### 3. International visits

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

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

*Source: International Passenger Survey*

	Trips (000s)	% change from year before	Spend (£ millions)	% change from year before
Wales	820	+4	£358	+12 <sup>1</sup>
Scotland	2,525	-13	£1,959	+5
London	15,037	+5	£9,976	+7
Rest of England	12,647	+6	£6,252	+9
Total UK	29,360	+2	£18,924	+7

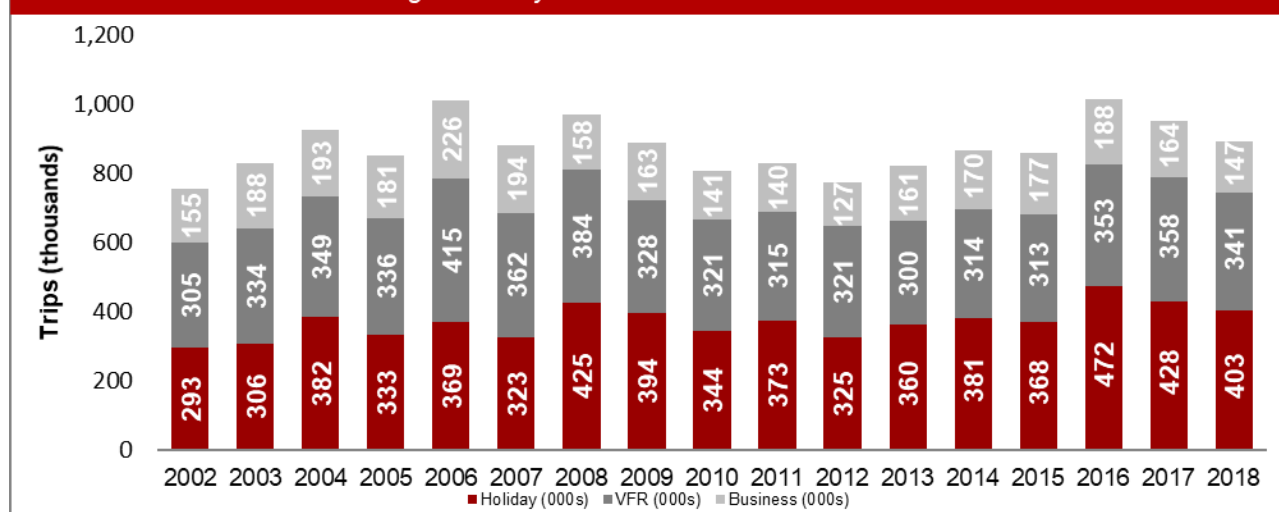
The number of international trips to Wales during the first nine months of 2019 rose by 4 per cent to 820,000. Inbound visitor spending was £358 million, a 12 per cent increase on same time last year. However, this figure included one particular outlying case with high value which, when weighted, affected the overall spend data.

Scotland experienced a 13 per cent decrease in the volume of international trips but a 5 per cent increase on spend. London was performing stronger on both trips and spend, and the rest of England saw increased international visitor numbers and increased spending.

Figure 3.0 shows that the fall in inbound international trips experienced in 2017-2018 happened roughly equally for all three types of purpose of visit: Holidays, Visits to Friends & Relatives and Business. Please note that the sum of the visitor numbers in any one year does not add up to the total number of visitors that year as shown in figure 3.1 overleaf. For the sake of clarity the 'miscellaneous' category has been omitted.

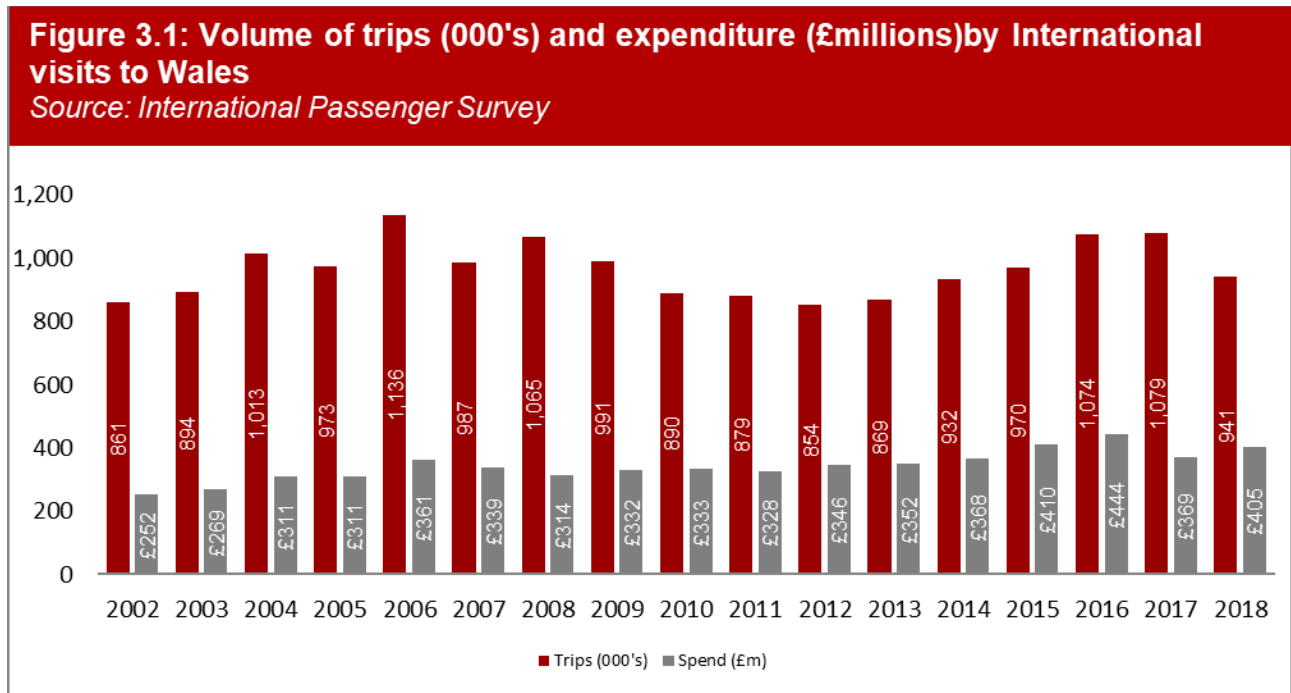
**Figure 3.0: Volume of International Trips to Wales by main purpose of visit for full years 2002 - 2018**

*Source: International Passenger Survey*



<sup>1</sup> The estimate for Wales included an outlying value with high expenditure, which affected the estimate of spending in Wales. No outlier treatment was applied, which is consistent with the current policy for the IPS.

Figure 3.1 shows the longer term trend in international visits to Wales. The number of trips fell in 2018 to 941,000, from the 2016 and 2017 peak of over 1 million visits. However, spending increased to £405 million in 2018, a 10 per cent increase compared with 2017.

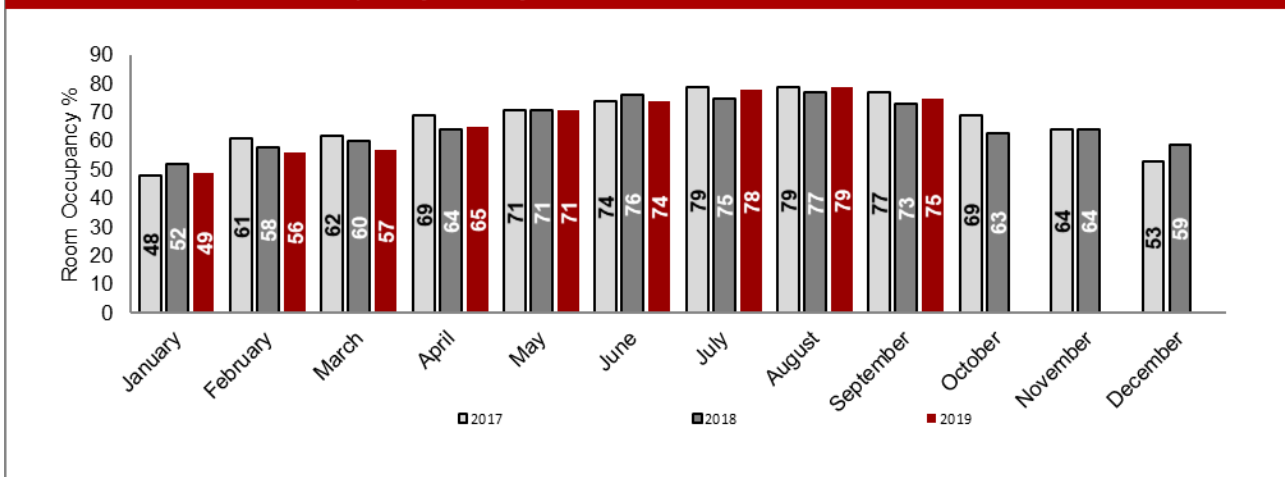


## 4. Accommodation occupancy rates

### Hotels

The average room occupancy for hotels in Wales between January and September 2019 was 67 per cent, which is slightly down from the 68 per cent from the same time the previous year. The bed occupancy rate in this period was 50 per cent, slightly down from the 51 per cent of the previous year.<sup>2</sup> Figure 4.0 shows that the monthly occupancy levels were up from the previous year for the months of April, July, August and September 2019.

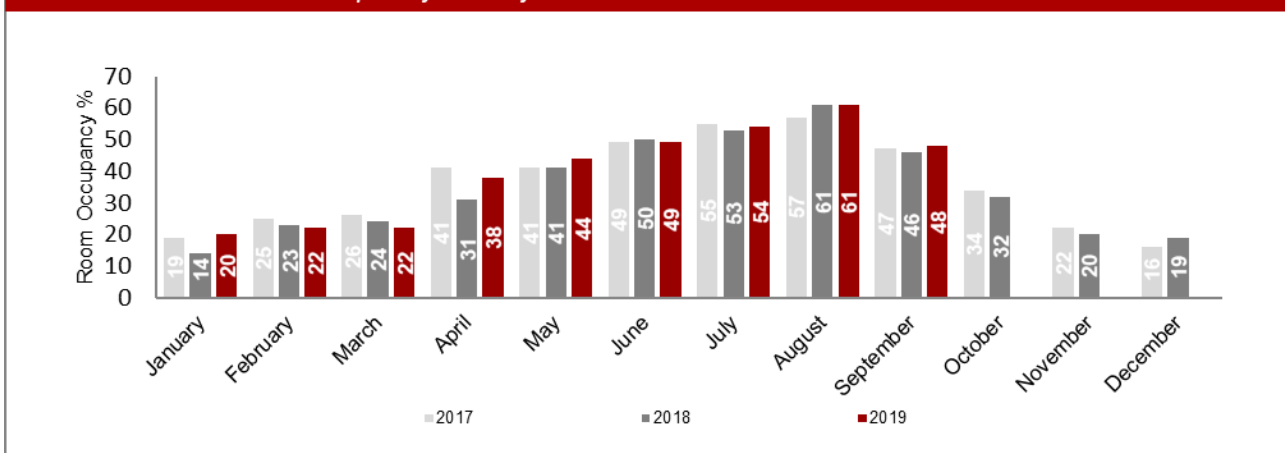
**Figure 4.0: Average monthly room occupancy for Hotel Establishments in Wales**  
Source: Visit Wales Occupancy Survey



### Guest houses and bed & breakfast

The average room occupancy for Guest Houses and Bed and Breakfast establishments in Wales between January and September 2019 was 40 per cent, which is slightly higher than the 38 per cent of the equivalent period in 2018. Figure 4.1 shows that the monthly occupancy levels were higher from the previous year for the months of January, April, May, July and September 2019.

**Figure 4.1: Average monthly room occupancy for Guest Houses and Bed and Breakfast Establishments in Wales**  
Source: Visit Wales Occupancy Survey

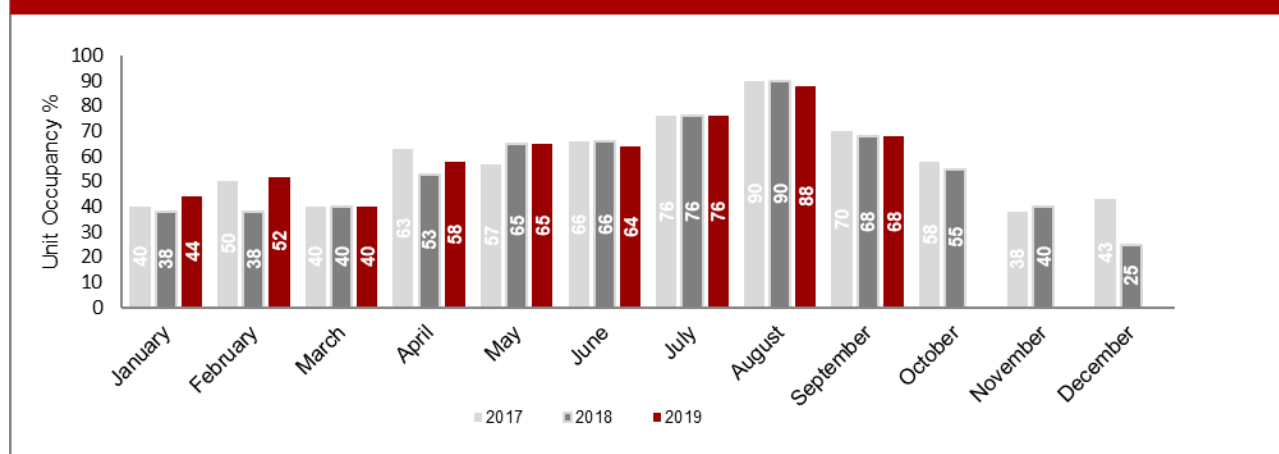


<sup>2</sup> NB: The 2019 occupancy data may be updated between editions of this quarterly report. As such, the data should be treated as provisional until the annual report is finalised.

## Self-catering cottages and apartments

The average unit occupancy for self-catering establishments in Wales between January and September 2019 was 61 per cent, higher than the average rate of 59 per cent for the equivalent period in 2018. Figure 4.2 shows that the monthly occupancy rates were higher than the previous year for January, February and April.

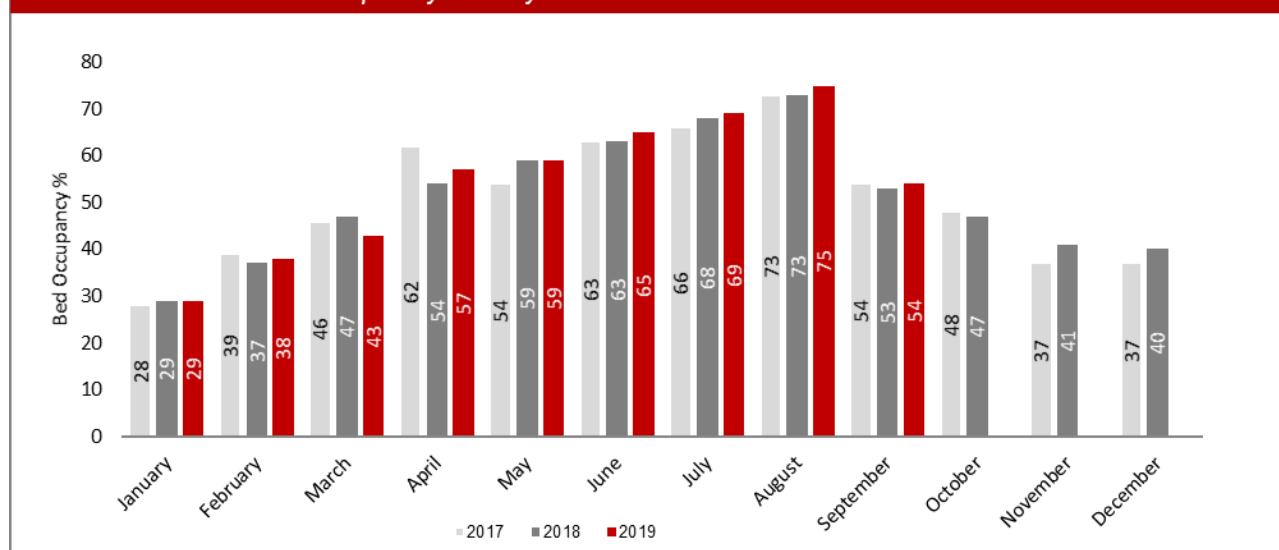
**Figure 4.2: Average monthly unit occupancy for Self-catering Accommodation in Wales**  
 Source: Visit Wales Occupancy Survey



## Hostels and bunkhouses

The average monthly bedspace occupancy for hostels and bunkhouses in Wales between January and September 2019 was 55 per cent, slightly up from the 54 per cent from the equivalent period in 2018. The months of February, April, June, July, August and September were all up from the previous year.

**Figure 4.3: Average monthly Bedspace Occupancy for Hostels & Bunkhouses in Wales**  
 Source: Visit Wales Occupancy Survey



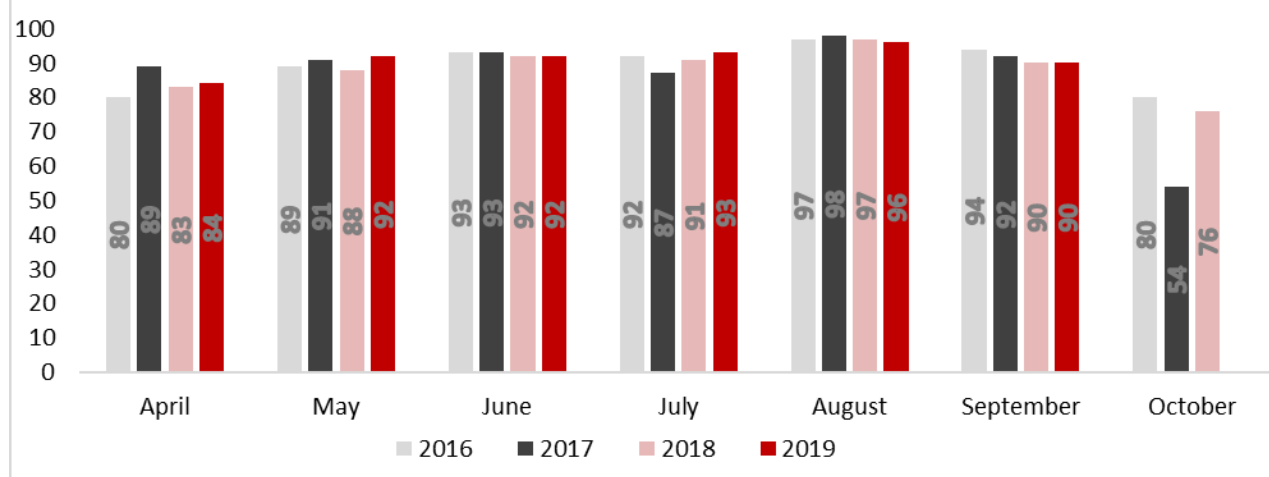
## Caravan holiday homes

The average occupancy levels are very similar year on year with the April to September 2019 average at 91 percent compared to 90 the previous year. Figure 4.4 shows that April, May and July performed slightly better than 2018.

The seasonal May to October average was 88 per cent in 2018, 86 per cent in 2017 and 91 per cent in 2016.<sup>3</sup>

**Figure 4.4: Average Unit Occupancy for Caravan Holiday Homes in Wales**

Source: Visit Wales Occupancy Survey



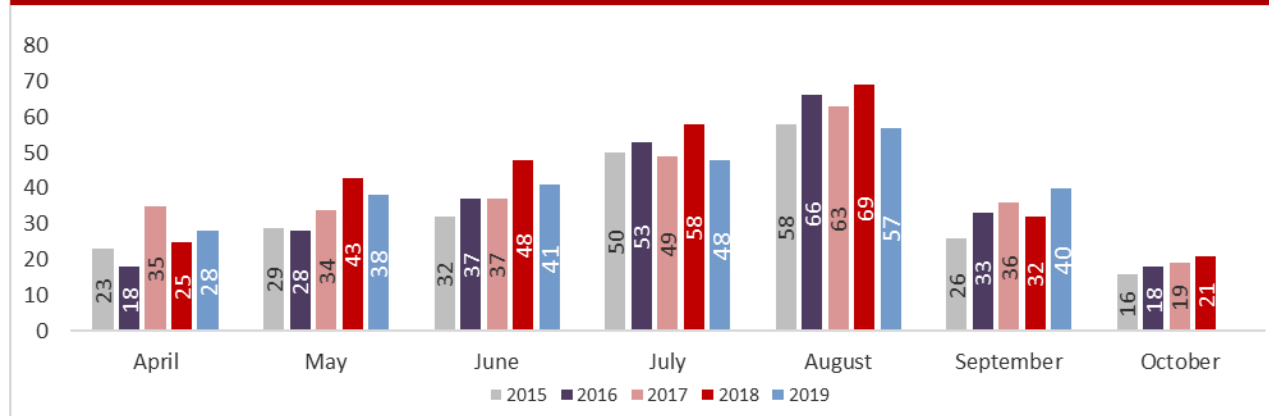
## Touring caravan and camping parks

The monthly occupancy levels for touring caravan and camping parks in 2019 was up in April and September but down from the previous year during May to August, averaging 42 per cent compared to the 46 per cent for the same period in 2018.

For comparison, the full season (May to October) 2018 average occupancy for touring caravan and camping parks was 42 per cent compared to 39 per cent for the same period in 2017.

**Figure 4.5: Average Pitch Occupancy for Touring Caravan and Camping Parks in Wales**

Source: Visit Wales Occupancy Survey



<sup>3</sup> As highlighted in previous quarterly reports, the reported unit occupancy levels for Caravan Holiday Homes in 2017 did not include a couple of larger accommodation providers and the difference in occupancy rates to 2016 and 2018 would mainly have been due to sample differences. However, this issue has been resolved and the data in Figure 4.4 above includes the larger providers for all of the three years.



## 5. Business performance

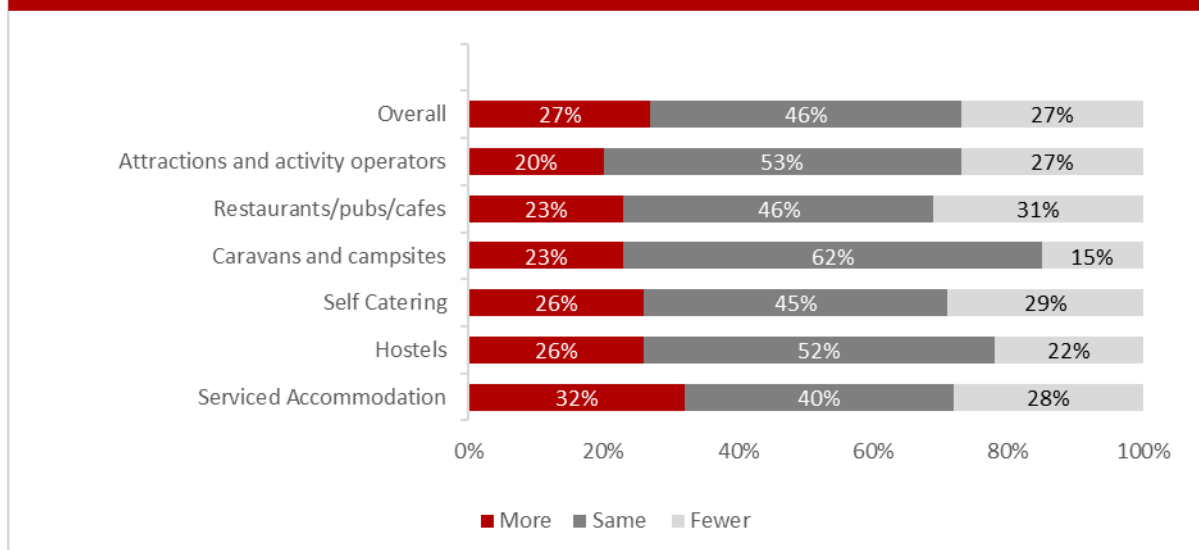
This section provides the results from the [Wales Tourism Barometer](#)<sup>4</sup>, which is based on a survey of around 800 tourism businesses, reflective of different parts of Wales and different sectors in the visitor economy. The survey is designed to give quick feedback on how the tourism industry in Wales is performing at key times during the year.

### Survey November

The Business Barometer undertaken in early November, after the autumn half term holiday, reported a mixed season for the industry.

- Over a quarter (27 per cent) of businesses have increased their visitor levels this autumn, but the same proportion has seen a decrease as shown in figure 5.0. Among those reporting an increase in visitors, about a quarter (23 per cent) cite 'own marketing' as a reason, and one in five (20 per cent) cite 'repeat business'.
- Among those reporting a decrease, the top two reasons for being quieter are the weather (27 per cent) and 'Brexit uncertainty' (22 per cent). However, 'more British people staying in the UK' is cited by 14 per cent of operators who have been busier, and some of them link this to Brexit uncertainty deterring holidaymakers from going abroad.

**Figure 5.0: Reported visitor levels during Autumn 2019**  
Source: Wales Tourism Industry Barometer - November 2019 survey

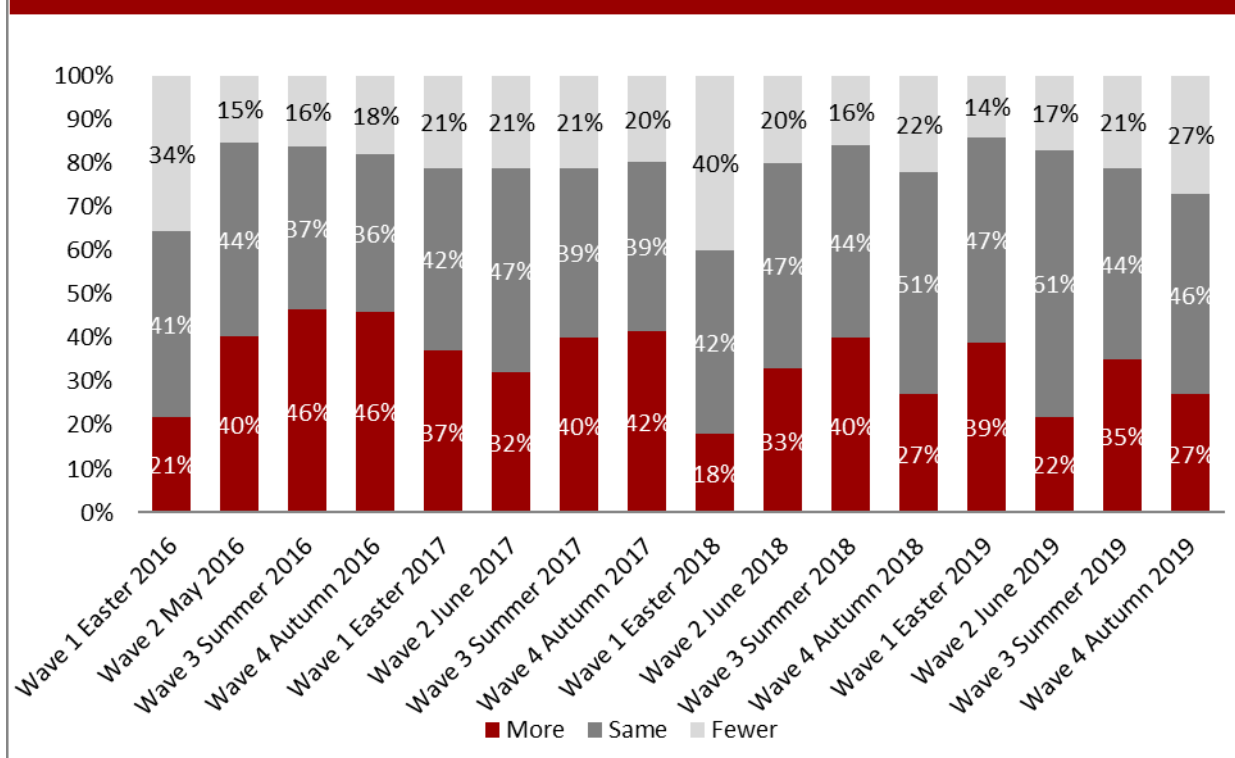


- The mixed period experienced by the industry as a whole is reflected across all sectors – the differences between them are not significant.
- Mid and South West Wales have both performed positively on balance. South East Wales on the other hand has seen about two in five (39 per cent) businesses receiving fewer visitors – many (36 per cent) of those do not know why they have been quieter.

<sup>4</sup> This source is not designated as an official statistic but is presented here for completeness for the benefit of users of this release.

- In spite of a mixed autumn period and much uncertainty in the UK currently, confidence for 2020 is reasonable. About three in ten (29 per cent) businesses are ‘very confident’ for 2020, and around half (49 per cent) are ‘fairly confident’. Confidence in the tourism industry is seasonal, and this result is typical for the time of year.
- Figure 5.1 shows trends in visitor levels from 2016. The autumn 2019 wave is in line with autumn 2018, but lower than the same time 2016 and 2017.

**Figure 5.1: Trends in reported visitor levels by businesses in Wales**  
 Source: Wales Tourism Industry Barometer



For the November wave, we also asked topical questions specifically on provision of Welsh food & drink, and operators’ attitudes towards it. Some of the questions were also asked in the June 2017 barometer, and we make comparisons where significant.

- The vast majority (87 per cent) of businesses which offer food and drink to customers include Welsh food & drink in their provision. Since June 2017, the proportion of businesses in South East Wales providing Welsh food & drink has risen significantly from 73 per cent to 87 per cent.
- About half (51 per cent) of businesses would like to offer more Welsh food & drink. The main reason for not wanting to do so is when the operator feels they already source as much Welsh produce as they can.

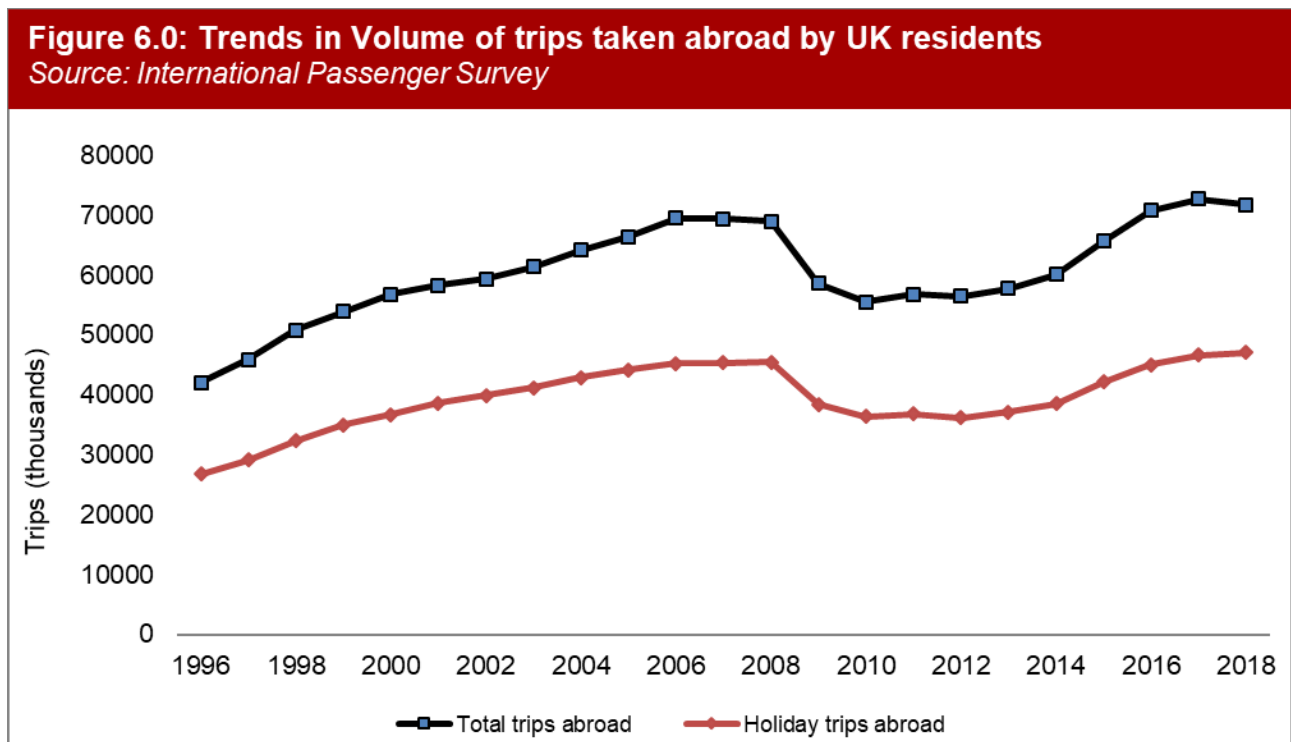
## 6. Overseas travel by UK residents

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](#).

This is a 1 per cent decrease compared to the 72.8 million trips taken in 2017. Between 2013 and 2017 the number of outbound trips had been growing year on year, though growth rate had slowed in 2017 to 3 per cent.

In 2018, 47.042 million holiday trips were taken abroad by UK residents, an increase of 1 per cent from 2017. Holiday trip numbers have shown strong growth since 2012, with growth rates peaking during 2015 and 2016.

The full year 2019 data will follow in the January – December 2019 report.



## 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 2018](#)

### **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 2018](#)

### **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. The occupancy data for the

individual months are rerun several times per year to take account of late responses, so the monthly in-year figures may change in between edition of this report. The monthly data should therefore be treated as provisional until the annual report is published. For more information see [Wales tourism accommodation occupancy surveys](#).

### **Wales's 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 4 was conducted with 820 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 4 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 our [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 and research section of the our 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 [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 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>

## **Next update**

The next Wales Tourism Performance report 2019 will be published in June 2020 (final date to be confirmed) and will include statistics for 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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