

Wales Tourism Performance Report January to December 2019

11 June 2020
SFR 57/2020

This report presents the results from the main official tourism surveys for Wales covering the period January to December 2019. Details of each survey including links to further information is provided in section 6 at the end of the report.

The data in this report, apart from the Tourism Barometer survey, relates to January – December 2019 so pre-dates the current COVID-19 situation. More recent data is likely to look very different.

Main Points

Top line results are summarised below and each survey is covered in more detail in the rest of the report. The results indicate a largely mixed year, with a higher volume of overnight visitor trips taken in Wales by GB residents, higher numbers of international visitors, but a fall in the number of day visitors.

Business performance

- The Tourism Barometer, undertaken in late April was the third extraordinary wave of spring 2020 surveys to understand the impact of the Covid-19 outbreak on the tourism industry.
- The previous wave of the survey, undertaken end of March 2020, had found that 97 percent of businesses were closed with 5 per cent not having opened in 2020 at all.
- The survey reported that government furlough support has kept redundancies to a minimum. The median estimated loss so far was 20 per cent of the whole years' revenue, ranging from no losses to 80 per cent.
- Around a quarter (23 per cent) of businesses did not expect to survive the following three months if lockdown continued, while three in ten (30 per cent) did not know how long they could survive.

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, day visits by GB residents, international visitors, accommodation occupancy rates, findings from the Wales Tourism Barometer and overseas travel by UK residents. 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]

Overnight visits by GB residents

- There were increases in visits to Wales during 2019 compared with 2018: an increase of 6.8 per cent to 10,698,000 in terms of trips and an increase of 8.1 per cent to £2,003 million in related spend. The corresponding figures at GB level show smaller increases of 3.6 per cent and 2.9 per cent respectively.
- For both Wales and GB as a whole the number of visits and total expenditure increased but the number of nights fell or remained stable - indicating that visitors are reducing or not increasing their length of trip but spend more while they are there.
- There were increases in the levels of overnight holiday trips and visits to friends and relatives in Wales, but the level of business trips decreased during 2019.

Day visits

- During 2019, there were 87,300,000 day visits to destinations in Wales, down 8.8 per cent on the same time in 2018. Related spend (£3,447 million) was down by 14 per cent. The corresponding figures at GB level were down 2.9 per cent on trips, but up by 5 per cent in terms of spend.

International visitors – Inbound travel

- The number of international trips to Wales during 2019, increased by 3.6 per cent year on year to just over one million (1,023,000). Visitor spending was £515 million, which was an 18.8 per cent increase on the same time last year. (Please note that ONS have adjusted the figures from the International Passenger Survey for the period 2009 - 2019).
- The corresponding figure for the whole of UK was a 1.4 per cent increase in the levels of visitors and a 7.3 per cent increase in corresponding expenditure.

International visitors - Outbound trips by UK residents

- There were just over 93 million trips taken abroad by UK residents in 2019 for all purposes - an increase of 2.8 per cent compared to the previous year.
- There were 58,700,000 holidays taken abroad by UK residents in 2019, an increase of 2.3 per cent compared to 2018 and continuing the strong demand for overseas holidays. This contrasts with a fall in overseas business trips of 3.4 per cent, but an increase in visits to friends and relatives of 6.2 per cent year on year.

Accommodation occupancy

- For the serviced accommodation types, there was a mixed picture. Hotels saw a slight fall in room occupancy rates for 2019 compared with the previous year to 66 per cent (from 67 per cent in 2018), but Guest Houses and B&Bs saw an increase to 37 per cent (from 35 per cent last year). Hostels were up slightly year on year to 54 per cent in 2019 compared to the 53 per cent of the previous year.
- Self-catering accommodation occupancy was 57 per cent slightly up compared to 55 per cent last year.
- The seasonal May to October average for caravan holiday homes was 90 per cent up slightly compared to the 88 per cent of the previous year, and the May to October occupancy for Touring caravan and camping parks was slightly down from last year with 42 per cent in 2019 compared to 46 per cent in 2018.

General note

- The analysis in this report relates to January – December 2019 so pre-dates the current COVID-19 situation.
- Interviewing for the International Passenger survey, which produces estimates for inbound and outbound travel, was suspended by the ONS in March 2020. Given domestic travel restrictions, data collection for the Great Britain Tourism Survey and Day Visit Survey has also been suspended. The Accommodation Occupancy survey has also been paused whilst current travel and opening restrictions on accommodation businesses are in force. The Tourism Business Barometer surveys have been adapted this year to assess impacts of the coronavirus.
- We are not yet able to give an indication as to when the next Tourism Performance report will be published but it will be pre-announced on the upcoming calendar as soon as the position is clear.

1. Overnight visits by GB residents

All purposes of trips

Table 1.0: Volume (millions) and Expenditure (£ millions) by Overnight Domestic GB Visitors for All Purposes of Trips

Source: Source: Great Britain Tourism Survey

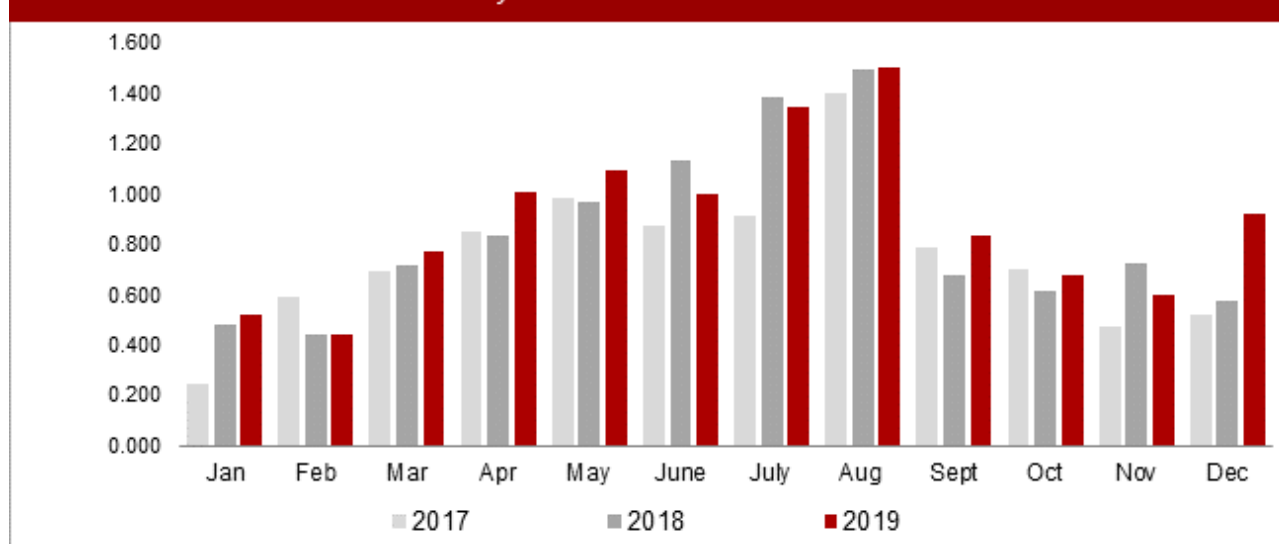
Trips taken in Wales			
	Jan to Dec 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	10.698	+6.8	10.021
Nights	35.077	-1.6	35.638
Spend (£)	£2,003	+8.1	£1,853
Trips taken in Great Britain			
	Jan to Dec 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	122.780	+3.6	118.556
Nights	371.806	+0.0	371.747
Spend (£)	£24,651	+2.9	£23,961

In 2019, there were 10,698,000 overnight trips to Wales by GB residents, which is a 6.8 percent increase on 2018. During 2019, there was a total expenditure of £2,003 million which is an 8.1 per cent increase on the previous year. In comparison, the total volume of overnight trips taken across GB as a whole also increased in 2019 compared to the previous year with 3.6 per cent. Related expenditure for GB increased by 2.9 per cent compared to 2018.

Figure 1.0 shows that the number of trips taken in Wales were higher during the shoulder months of April – May and September - October 2019 compared to the previous year. The visitor numbers during the peak months were equal to or slightly less than 2018.

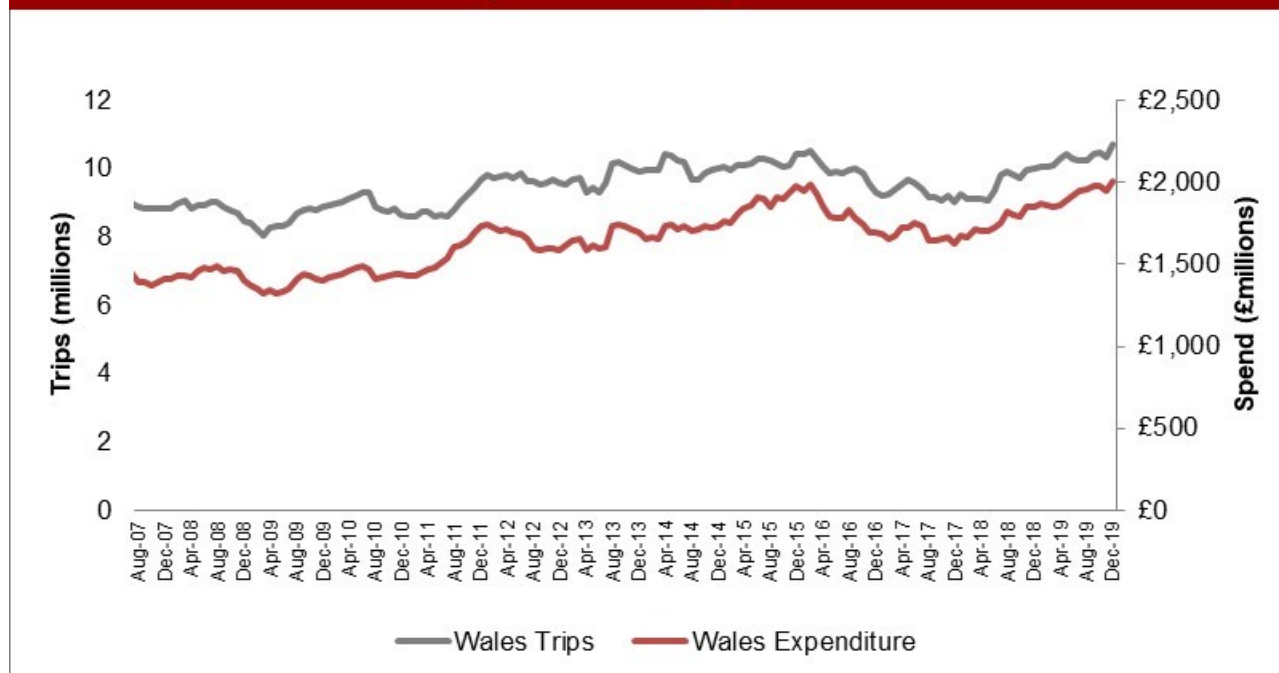
Figure 1.0: Monthly Volume of Overnight Trips taken in Wales by GB Residents

Source: Great Britain Tourism Survey



The longer term trend in figure 1.1 shows that annual trips and spend to Wales peaked in 2015 with around 10.5 million annual trips and £1,985 million in expenditure. There was a fall in trips taken in Wales during 2016 and 2017. However during the last year both spend and visitor levels picked up and have now caught up with the levels last seen in 2016. The strong performance during 2019 resulted in increases in the volume of trips taken in Wales of almost 7 percent and the level of expenditure of 8 per cent compared to the previous year.

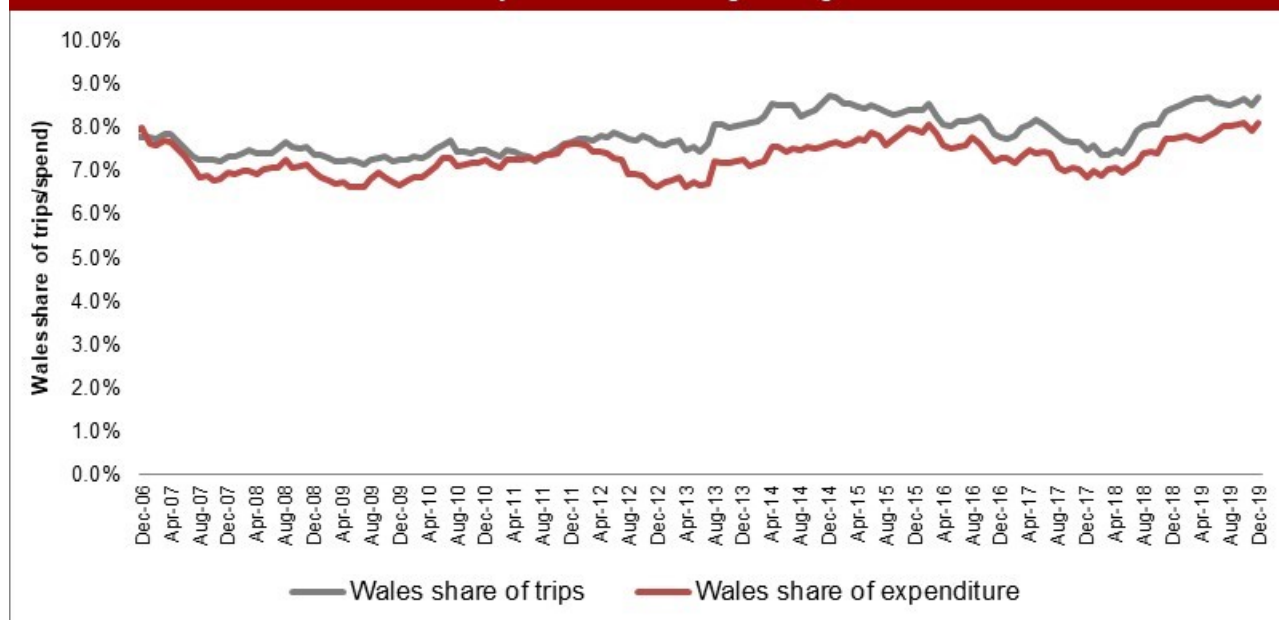
Figure 1.1: Trends in Overnight Trips and Expenditure in Wales by GB Residents
Source: Great Britain Tourism Survey: 12 month rolling totals



Wales share of trips and spend

Figure 1.2 shows that Wales' share of overnight trips (any purpose) taken by GB residents peaked in 2014-2015 with an 8.8 per cent share of trips and 8 per cent share of spend. The share of trips and spend fell during 2016 and 2017 but increased during 2019 with an average share of 8.7 per cent of trips and 8.1 per cent of spend in the 12 months ending December 2019.

Figure 1.2: Wales share of overnight trips and expenditure by GB Residents
Source: Great Britain Tourism Survey: 12 month rolling average share



Overnight holidays

Table 1.1: Volume (millions) and Expenditure (£ millions) of Overnight Domestic GB Visitors Trips for Holiday Purposes

Source: Great Britain Tourism Survey

Holiday Trips taken in Wales			
	Jan to Dec 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	6.710	+4.6	6.412
Nights	23.061	-5.8	24.487
Spend (£)	£1,439	+5.6	£1,362
Holiday Trips taken in Great Britain			
	Jan to Dec 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	60.452	+4.4	57.894
Nights	198.144	-1.1	200.249
Spend (£)	£14,483	+1.3	£14,292

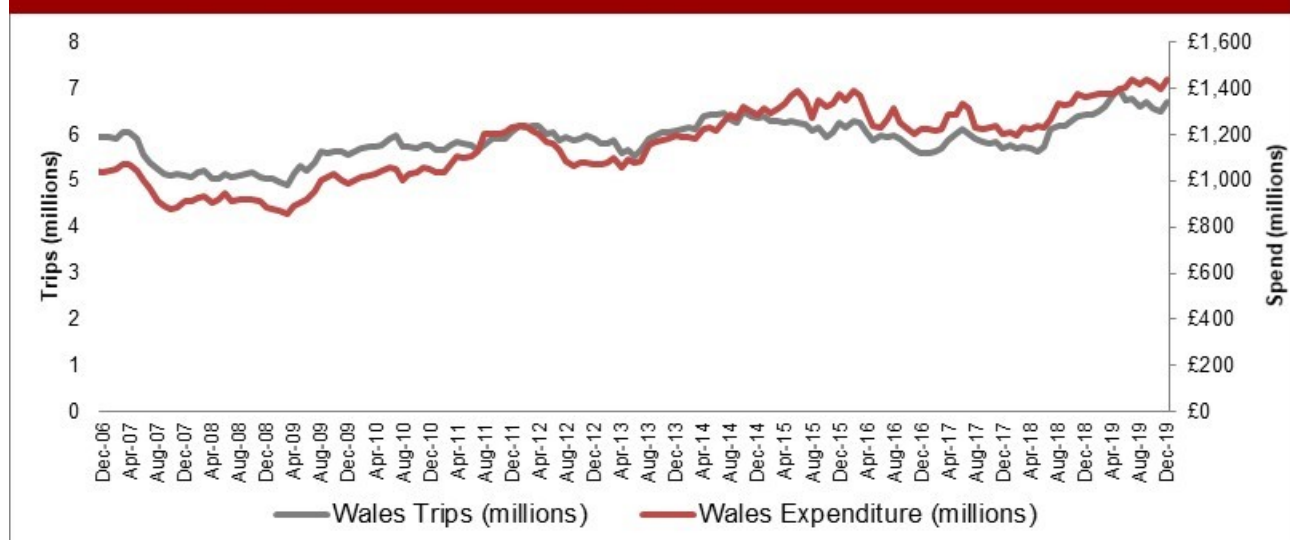
During 2019, there were 6,710,000 overnight holiday trips to Wales by GB residents, which is an increase of 4.6 per cent on 2018, which was 6.4 million. During 2019, there was a total expenditure of £1,439 million.

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 increased to above the 2014 level, a trend which continued into 2019, where the visitor numbers were 6.7 million. The chart shows that the volume of expenditure roughly followed the volume of visits over time.

In comparison, the volume of overnight trips taken across GB as a whole have shown a 4.4 percent increase during 2019 with trip volumes of 60.5 million and an increase in spend of 1.3 per cent. The Wales share of GB holiday trips however increased to 11.1 per cent over the last 12 months from 9.7 per cent in 2017.

Figure 1.3: Volume of Overnight Trips and Spend on Holidays Taken in Wales by GB Residents

Source: Great Britain Tourism Survey 12 month rolling totals



Visits to friends and relatives

Table 1.2: Volume (millions) and Expenditure (£ million) of Overnight Domestic GB Visitors; Visits to Friends & Relatives (VFR)

Source: Great Britain Tourism Survey

VFR Trips taken in Wales			
	Jan to December 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	3.058	+23.5	2.477
Nights	9.650	+24.2	7.767
Spend (£)	£327	+12.8	£290
VFR Trips taken in Great Britain			
	Jan to September 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	42.894	+4.5	41.050
Nights	127.781	+4.3	122.552
Spend (£)	£5,051	+7.3	£4,706

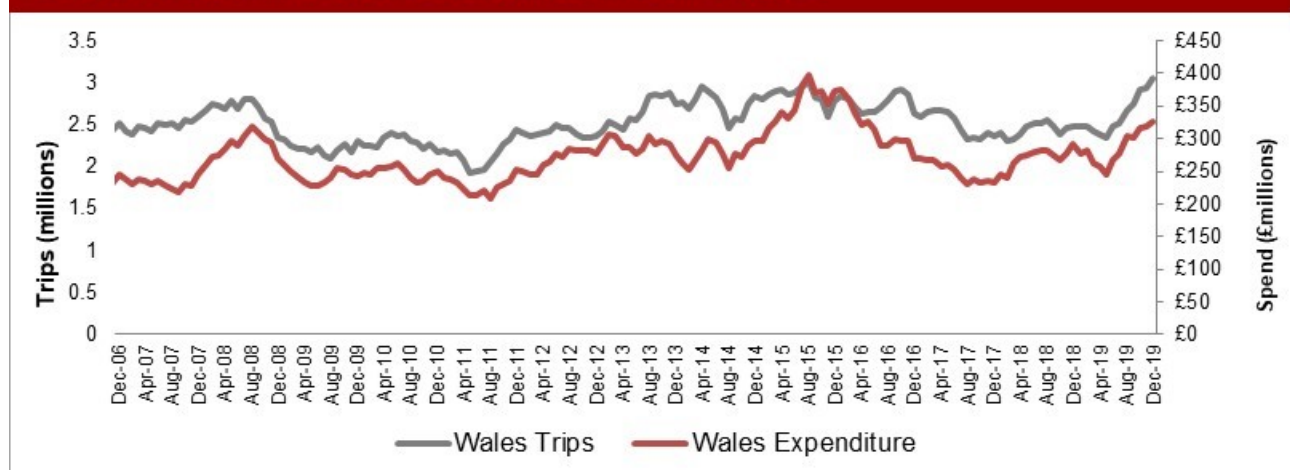
During 2019, there were 3,058,000 overnight trips to visit friends and relatives in Wales by GB residents, which is a large increase of over 23 per cent on 2018, which saw 2,477,000 trips. During this period, there was a total expenditure of £327 million, which also was a large increase compared to 2018.

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. The visitor levels recovered in 2018 and in 2019 the overall VFR trip levels were at 3 million, back up to the 2015 level.

In comparison, there has also been an increase in overnight visits to friends and relatives across GB as a whole during 2019.

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 Expenditure (£ millions) of Overnight Domestic GB Visitors; Business Visits

Source: Great Britain Tourism Survey

Business Visits taken in Wales			
	Jan to December 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	0.720	-12.8	0.826
Nights	1.777	-9.2	1.958
Spend (£)	£173	+9.5	£158

Business Visits taken in Great Britain			
	Jan to December 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	16.321	+0.3	16.272
Nights	36.195	-7.1	38.954
Spend (£)	£4,562	+4.4	£4,371

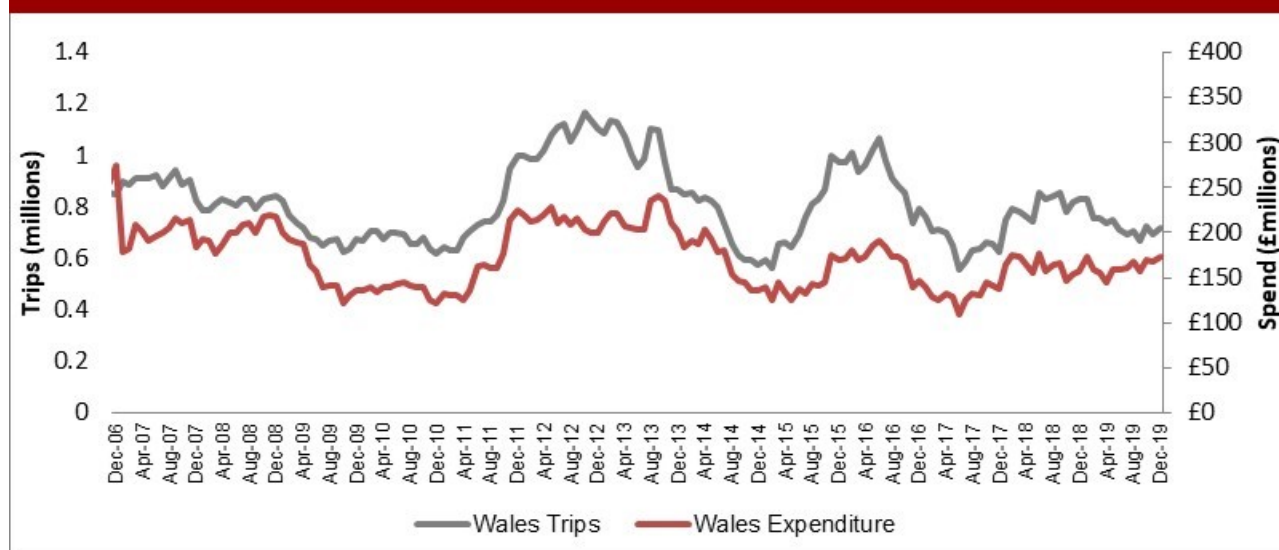
During 2019 there were 720,000 overnight business trips to Wales by GB residents, which is a decrease of 12.8 per cent on 2018 which was 0.8 million trips. During 2019, there was a total expenditure of £173 million, which was a 9.5 per cent increase compared to 2018.

Figure 1.5 shows that overnight business trips taken in Wales by GB residents have fluctuated widely over time but there was a peak in 2012 with over 1.1 million annual trips. Trip volumes also reached over 1 million in early 2016 but then trip volumes fell in 2017. 2018 showed a general increase in the overall level of business visits, but the average 2019 levels have fallen.

In comparison, there has been a slight increase in overnight business trips taken across Great Britain as a whole during 2019, but that comes after a longer term fall in the volume of business trips. There was a fall in the volume of trips in GB from over 19 million annual trips in 2012 to the current volume of 16.3 million trips taken in 2019.

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

Source: Great Britain Tourism Survey 12 months rolling totals



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			
	January to December 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	87.3	-8.8	95.7
Spend (£)	£3,447	-14.0	£4,009

Tourism Day visits taken in Great Britain			
	January to December 2019 (millions)	% change from year before	12 month total ending Dec 2018 (millions)
Trips	1,653	-2.9	1,703
Spend (£)	£66,978	+5.0	£63,782

There has been a slight decrease in the volume of tourism day visits taken in Wales during 2019, compared to the same period in 2018, with 87,300,000 trips taken which is a decrease of 8.8 per cent. The overall spend fell by 14 per cent in 2019 with an expenditure of £3,447 million. There was a similar but smaller decrease in the overall day visit levels for Great Britain as a whole.

Figure 2.0 shows the monthly volume of tourism day visits to Wales since 2017. 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

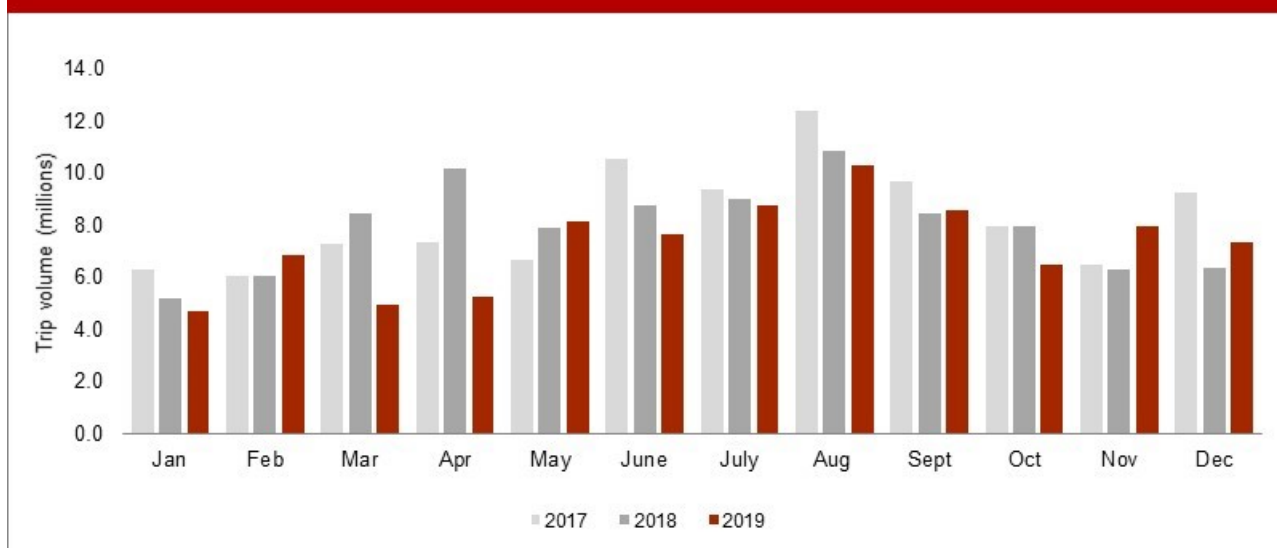


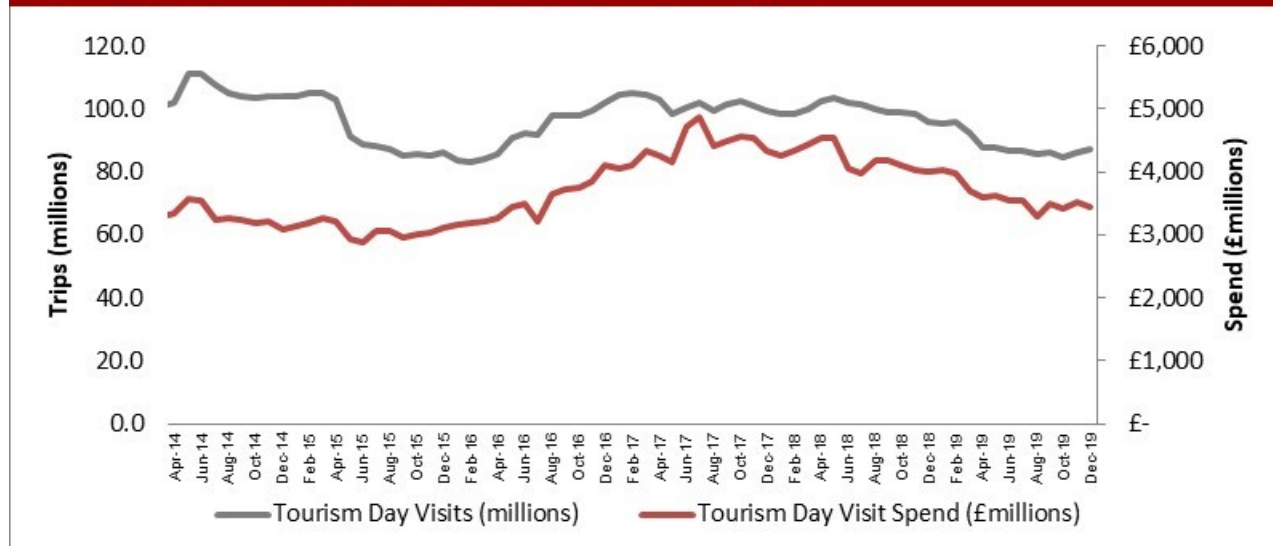
Figure 2.1 shows that tourism day visits taken in Wales by GB residents fell from a level of almost 118 million annual trips in 2012 to 83 million trips in 2016. Trip volumes then increased to over 100 million annual trips in early 2018, but have now fallen to their current level of 87 million trips.

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 1,653 million annual trips in 2019.

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

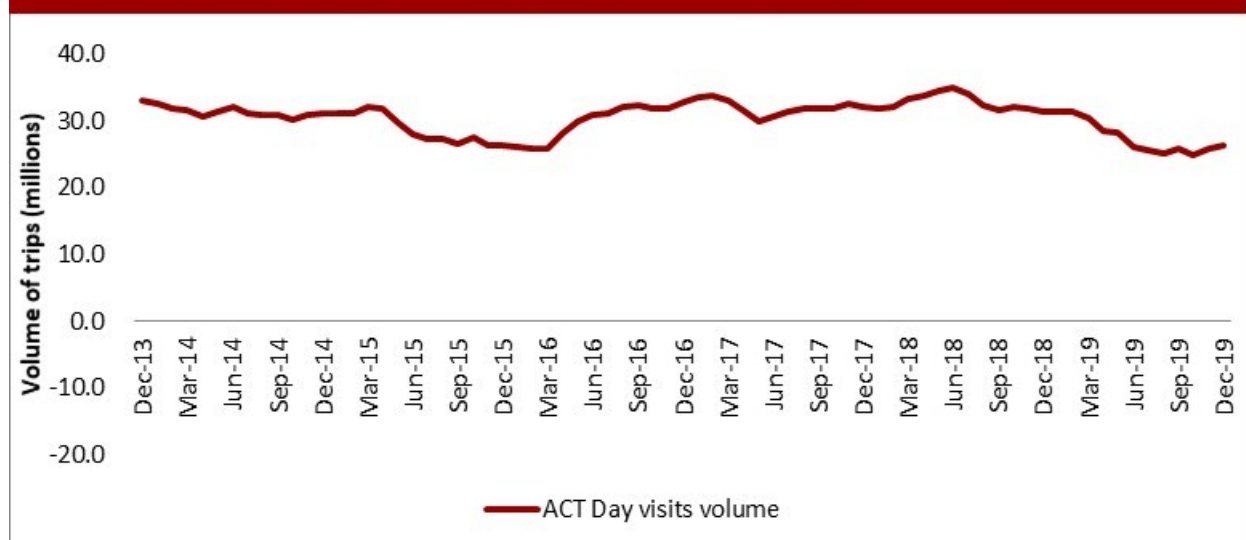
Source: Great Britain Day Visits Survey 12 month rolling totals



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 2019, there were 26.3 million day visits taken in Wales that involved activities core to tourism. This was a decrease of 16 per cent compared to the total of 31 million ACT trips in 2018. During 2019, 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 totals



3.a International visits - inbound

The results reported in this section are from the International Passenger Survey (IPS).

Background

The International Passenger Survey (IPS) is used to produce official statistics relating to international visitors to the UK and Wales. Around 250,000 interviews per year are conducted at ports and airports with those entering or leaving the country, and the ONS uses data from around 45,000 of these to estimate figures for international visitors. ([Further information](#))

The ONS have responded to concerns that visitors from some countries may be under-represented in the estimates, notably China as well as other countries in south-east Asia, and have developed a new adjustment method, updating the weightings. The new method was developed using Home Office landing card data for different countries to understand where there was under or over representation in the previous estimates.

On 22 May 2020 ONS released final 2019 estimates of trips and spend to Wales based on the new method as well as revised estimates of trips and spend for the period 2009 – 2018 (estimates of trips and spend prior to 2009 remain unchanged).

[A summary of the new method developed by the ONS is available here](#)

Table 3.0: Volume of Trips and Expenditure of Inbound International Visitors <i>Source: International Passenger Survey</i>				
	January – December 2019 Trips (000s)	% change from year before	Spend (£ millions)	% change from year before
Wales	1,023	+3.6	£515	+18.8
Scotland	3,460	-7.2	£2,538	+6.7
London	21,713	+3.0	£15,725	+5.8
Rest of England	16,937	+3.7	£9,055	+9.6
Total UK	40,857	+1.4	£28,448	+7.3

During 2019, there was an increase of 3.6 per cent in the volume of international trips to Wales year on year with just over one million trips taken. The visitor expenditure, increased by 18.8 percent year on year to £515 million.

There were almost 41 million international trips to the UK during 2019, which was an increase of 1.4 per cent compared to 2018. Inbound visitor spending was almost £28.5 billion, an increase of 7.3 per cent compared to 2018.

Figure 3.0 shows that the increase in international trips taken in Wales during 2019 is mainly due to an increase in the volumes of trips to visit friends and relatives and to a lesser extent business trips. (NB: the chart below does not contain the numbers for international students in Wales and therefore the total does not add up to the total visitor number shown in the table above)

Figure 3.0: Volume of International Trips to Wales by main purpose of visit for full years 2003 - 2019

Source: International Passenger Survey

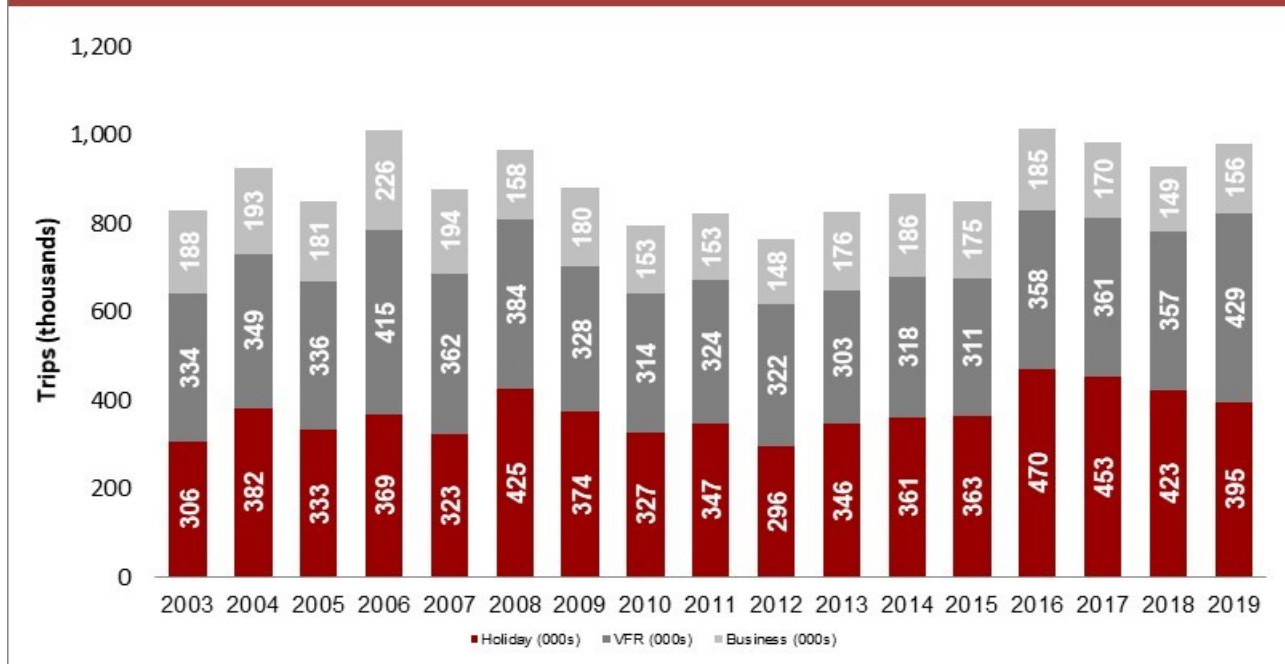
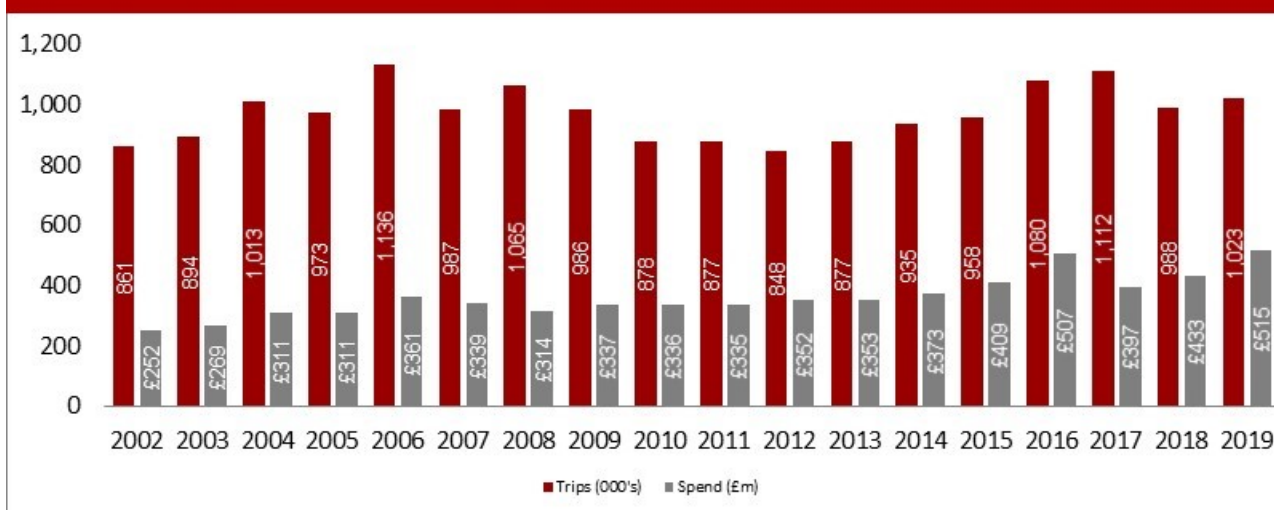


Figure 3.1 shows the longer term trend in international visits to Wales. The volume of trips taken in Wales by international visitors reached above 1 million visits in 2016 and 2017, the second highest recorded level of visitors. However, the volume of trips fell to under a million again in 2018 before rising by 3.6 per cent to 1,023,000 in 2019.

The corresponding UK figures show a longer term growth in international visits to the UK which reached a record of 41 million trips in 2017 and a record expenditure of £28.4 billion. However, in 2018 the level of international visits and the level of expenditure fell, before picking up again in 2019.

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

Source: International Passenger Survey



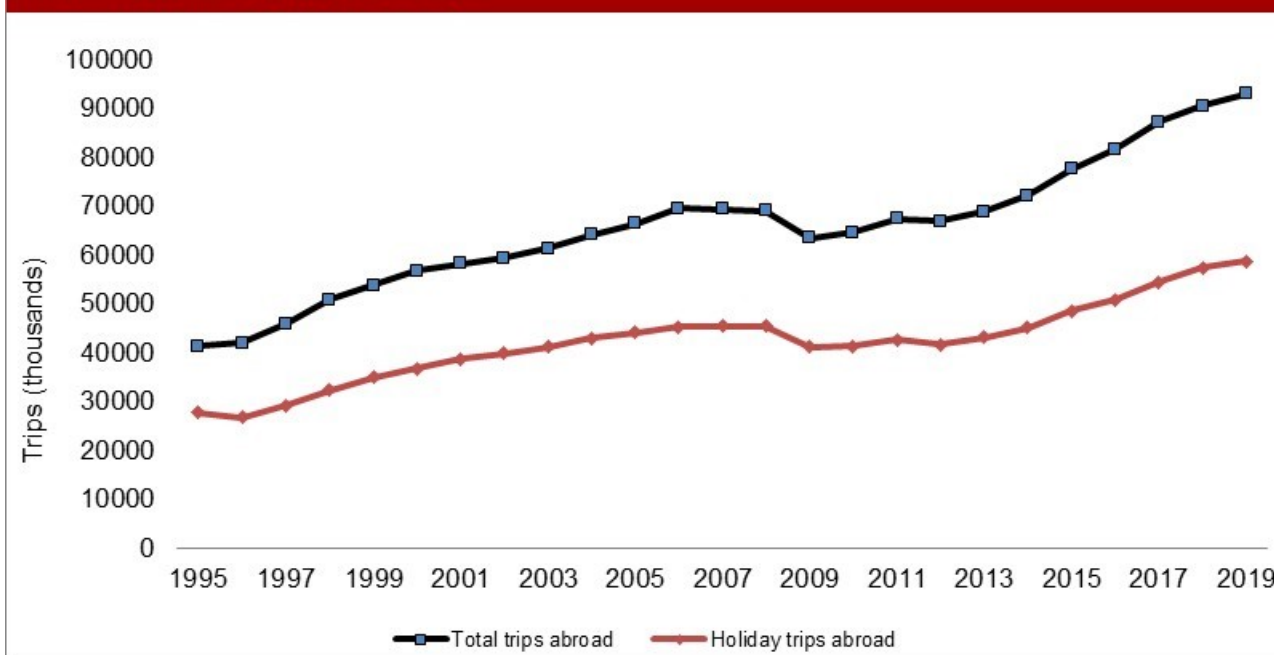
3.b International visits - overseas travel by UK residents

As described above, ONS have adjusted the international passenger data from 2009 to 2019. Figure 6.0 shows the updated data from 2009 onwards.

During 2019, there was a total 93,086,000 trips taken overseas by UK residents for all purposes. This is 2.8 per cent up from 2018. There were 58,668,000 holidays taken abroad by UK residents in 2019, an increase of 2.3 per cent compared to the same period in 2018 showing the continuing demand for overseas holidays. This contrasts with a fall in overseas business trips of 3.4 per cent, but an increase in visits to friends and relatives of 6.2 per cent year on year.

Figure 3.2: Trends in Volume of trips taken abroad by UK residents

International Passenger Survey



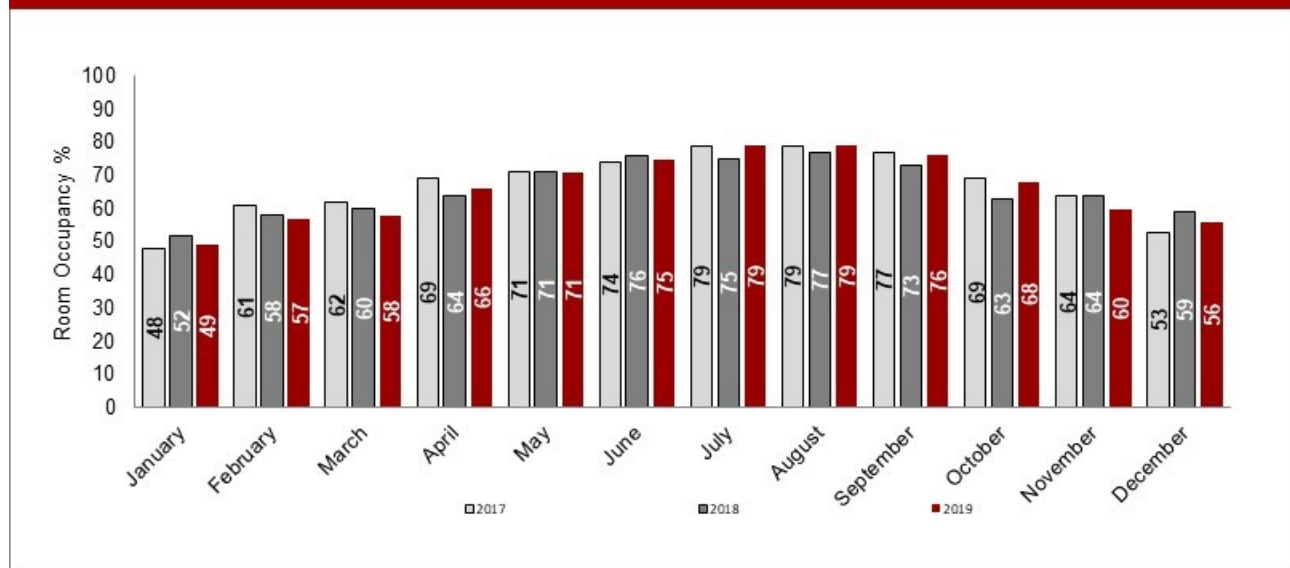
4. Accommodation occupancy rates¹

Hotels

The average room occupancy for hotels in Wales in 2019 was 66 per cent, slightly down from the 67 per cent of 2017 and 2018. The bed occupancy rate in this period was 49 per cent, slightly down from the 50 per cent of the previous year.²

Figure 4.0 shows that the room occupancy rates for the months of April and the summer months - July to October and December, were above last year's occupancy levels.

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



Guest houses and Bed & Breakfast

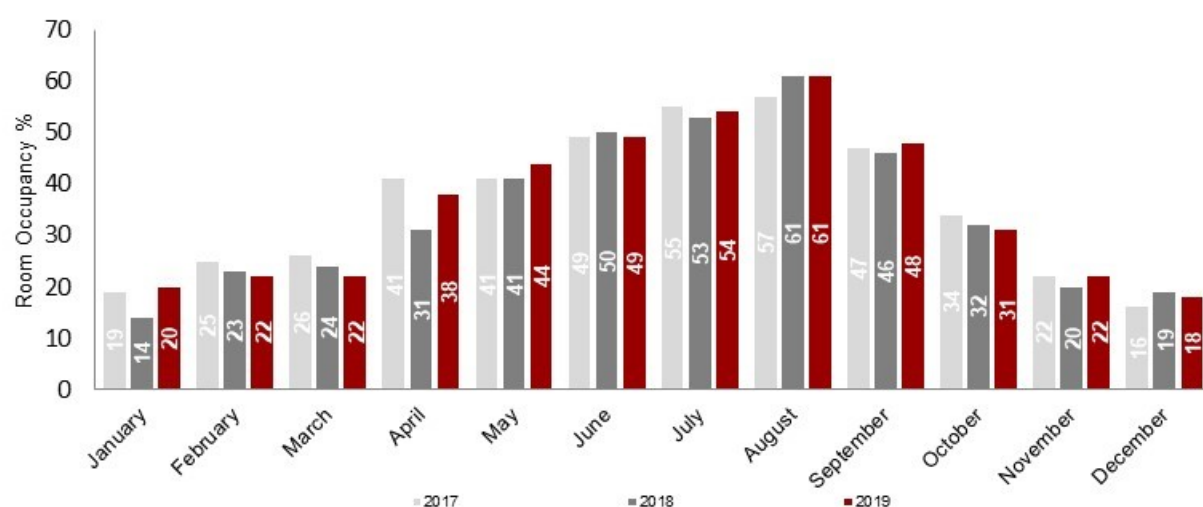
The average room occupancy for Guest Houses and Bed and Breakfast establishments in Wales during 2019 was 37 per cent, which is higher than the average rate of 35 per cent for 2018. Figure 4.1 shows that the monthly occupancy levels were higher than the previous year for the months of January, April, May, July, September and November 2019.

¹ The 2019 monthly figures in this section may vary slightly from those in the previous 2019 reports. This is caused by rerun of the monthly data including any late returns.

² 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 separate annual report is finalised.

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

Source: Visit Wales Occupancy Survey

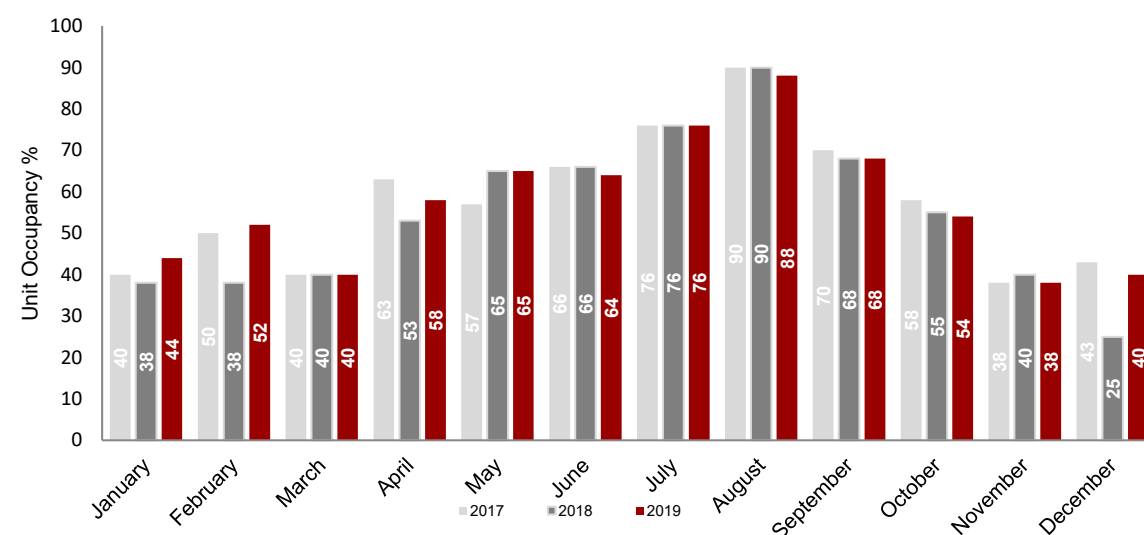


Self-catering cottages and apartments

The average unit occupancy for self-catering establishments in Wales in 2019 was 57 per cent, slightly higher than the average rate of 55 per cent for 2018. Figure 4.2 shows that the occupancy rates were higher for the first two months of the year, and in April and December.

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

Source: Visit Wales Occupancy survey

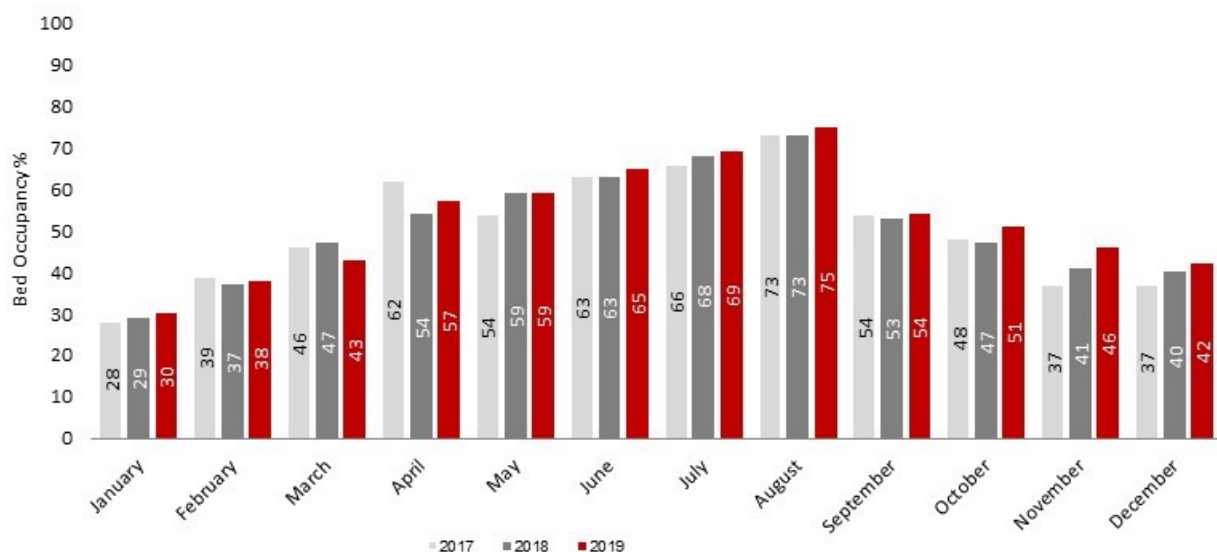


Hostels & bunkhouses

The average monthly bedspace occupancy for hostels and bunkhouses in Wales in 2019 was 54 per cent, slightly up from the 53 per cent of 2018. Figure 4.3 shows that for all months, apart from March, the occupancy rates were higher or similar compared to the previous year.

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

Source: Visit Wales Occupancy Survey

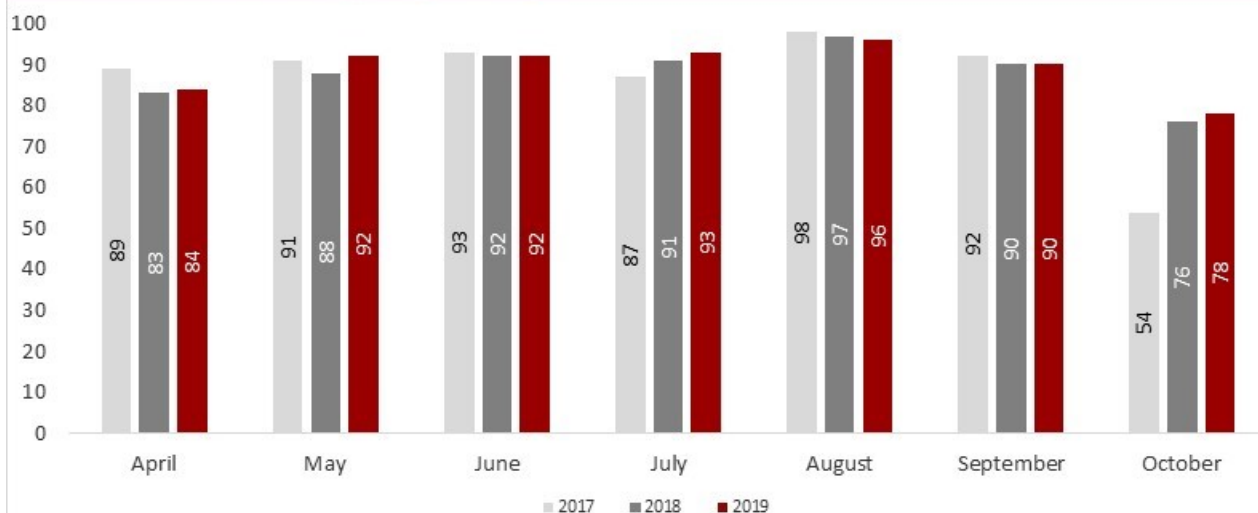


Caravan holiday homes

Figure 4.4 shows that the months of April, May, July and October performed slightly better than 2018. The seasonal May to October average unit occupancy was 90 per cent in 2019, 88 per cent in 2018, and 86 per cent in 2017.³

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

Source: Visit Wales Occupancy Survey



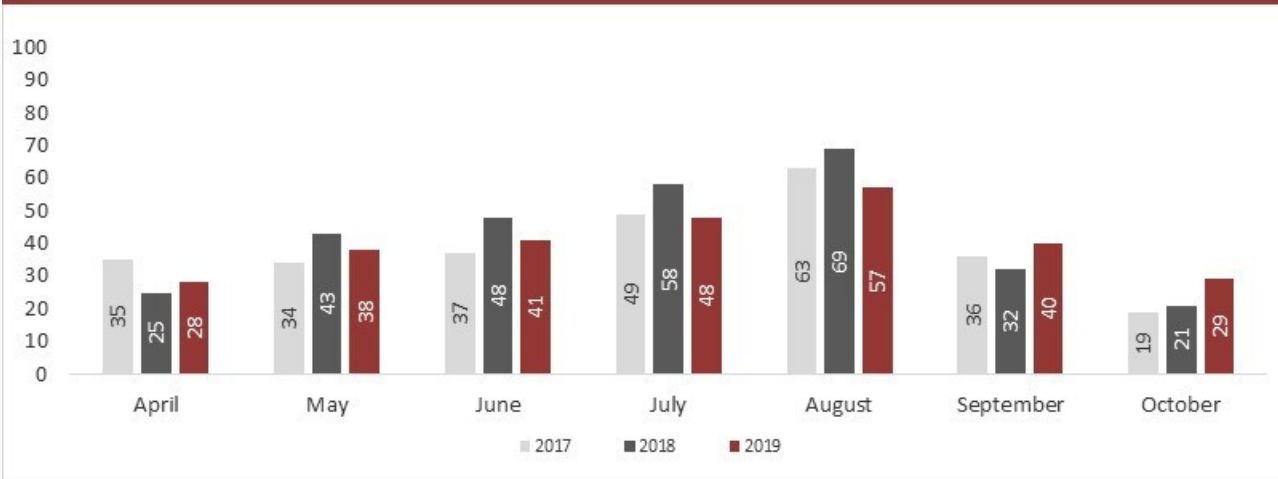
³ As highlighted in previous quarterly reports, the reported unit occupancy levels for Caravan Holiday Homes in 2017 did not include a couple of larger accommodation providers and the difference in occupancy rates to 2016 and 2018 would mainly have been due to sample differences. However, this issue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

Touring caravan and camping parks

The monthly pitch occupancy levels for touring caravan and camping parks in 2019 were up in the shoulder months of April, September and October but down from the previous year during the summer months May to August, averaging 40 per cent in 2019 (April – October) compared to the 42 per cent for the same period in 2018.

For comparison, the full season (May to October) average pitch occupancy for touring caravan and camping parks was 42 per cent in 2019 compared to 46 per cent in 2018 and 40 per cent in 2017.

Figure 4.5: Average Pitch Occupancy for Touring Caravan and Camping Parks in Wales
Source: Visit Wales Occupancy Survey



5. Business performance

This section provides the results from the Wales Tourism Business Barometer⁴ which is based on a telephone 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 April 2020 survey was the third extraordinary wave of spring 2020 surveys to research the impact of the COVID-19 outbreak on the tourism industry.

The Business Barometer was undertaken the last week of April and the report can be found here: [2020 Business Tourism Barometer](#).

The previous wave of the survey, undertaken end of March 2020, had found that 97 percent of businesses were closed with 5 per cent not having opened in 2020 at all.

Headline findings:

Furlough support had kept redundancies to a minimum to that point. The majority (71 per cent) of businesses which employ any staff said they had to put at least some of them on paid leave / furlough.

On average, 8 staff per tourism business were furloughed / put on paid leave. When based to just businesses taking that action, the average was 11 per business. If a business furloughed any staff, it was likely to be all or nearly all of those they employ.

By comparison, the average number of redundancies made per business which employ staff was only 0.1. The support for furloughed staff had helped to keep this number low.

About one in six (16 per cent) businesses would normally employ seasonal staff at this time of year. Out of these, only a minority (14 per cent) were still able to do so – or 2 per cent of the whole survey sample.

The median reported loss as a result of the crisis in just the period since the beginning of the outbreak was approximately 20 per cent of normal revenue for the whole year. This finding was consistent across sector, region and business size. The range was however considerable – from not having lost anything, to over 80 per cent of normal annual revenue.

Around a quarter (23 per cent) of businesses did not expect to survive the following three months if lockdown continued, while three in ten (30 per cent) did not know how long they could survive.

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

6. 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, though this is changing to online from 2020 onwards, 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 are 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. The outbound international passenger data is not available on a Wales level.

As mentioned above in section 3, ONS have recently re-weighted the IPS data from 2009 onwards and this reweighted data is used in this report.

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 separate 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 2020 Covid impact survey wave 3 was conducted with 805 telephone interviews. This makes results of questions asked to all accurate to ± 3.5 per cent. The sample is reflective of the tourism industry in Wales. For more information see [Wales Tourism Barometer Covid19 impact-survey-wave-3-2020](#)

Survey results

The surveys reported in this output 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 and research 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>

The analysis in this report relates to January – December 2019 so pre-dates the current COVID-19 situation.

Interviewing for the International Passenger survey, which produces estimates for inbound and outbound travel, was suspended by the ONS in March 2020. Given domestic travel restrictions, data collection for the Great Britain Tourism Survey and Day Visit Survey has also been suspended. The Accommodation Occupancy survey has also been paused whilst current travel and opening restrictions on accommodation businesses are in force. The Tourism Business Barometer surveys have been adapted this year to assess impacts of the coronavirus.

We are not yet able to give an indication as to when the next Tourism Performance report will be published but it will be pre-announced on the upcoming calendar as soon as the position is clear.

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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