

Great Britain Tourism Survey, January to December 2017

05 April 2018
SFR 28/2018

This report provides provisional results from the Great Britain Tourism Survey for the full 2017 year and is an update of the results published in the last quarterly report for the period January to September 2017.

In future, we will be publishing the results from Great Britain Tourism Survey alongside the results from other tourism surveys in a new combined quarterly tourism statistics report. This will be a more comprehensive report that combines the latest quarterly statistics from all of the main tourism surveys and aims to provide better context for the results from the individual surveys on the performance of the tourism industry. The first combined report will be published in May 2017, final date to be confirmed.

Key points

During the period between January and December 2017 there were 9.02 million trips to Wales by overnight domestic visitors, a 3.0% decrease when compared to the previous year. Similarly spend also decreased by 3.6% to £1,628 million.

Table 1: Trips to Wales in the 12 month period ending December 2017

Wales	January - December 2016	January - December 2017	% change from year before
Trips (millions)	9.31	9.02	-3.0%
Nights (millions)	32.98	30.98	-6.1%
Spend (£ millions)	£ 1,689	£ 1,628	-3.6%

About this release

This release summarises overnight domestic tourism in Wales during the twelve months January to December 2017 (inclusive).

Numbers for trips and nights are rounded to 2 decimal places, while percentages are rounded to 1 decimal place, and spend to the nearest million pounds.

Figures are provisional and may be subject to final revision.

In this release

Year on year averages	3
Purpose of visit	4
Seasonality	6
Trip characteristics	7
Long term trends	8
Context	9
Key quality information	11

Levels of trips and nights in Great Britain by British residents have increased slightly during January to December 2017 when compared to January to December 2016; trips increasing by 1.0% to 120.68 million and nights by 2.8% to 369.46 million. Over the same period, the level of related expenditure increased by 2.6% to £23,683 million.

Table 2: Trips to Great Britain in the 12 month period ending December 2017

Great Britain	January - December 2016	January - December 2017	% change from year before
Trips (millions)	119.46	120.68	+1.0%
Nights (millions)	359.56	369.46	+2.8%
Spend (£ millions)	£23,079	£23,683	+2.6%

Year on year changes

Over the 12 months ending December 2017 there were 9.02 million trips to Wales and 30.98 million nights stayed, with a related expenditure of £1,628 million.

The volume of trips, nights and spend was lower in the 12 months ending December 2017 compared to 2016 and 2015.

Figure 1: Overnight trips to Wales for the 12 months ending December 2015, 2016 and 2017

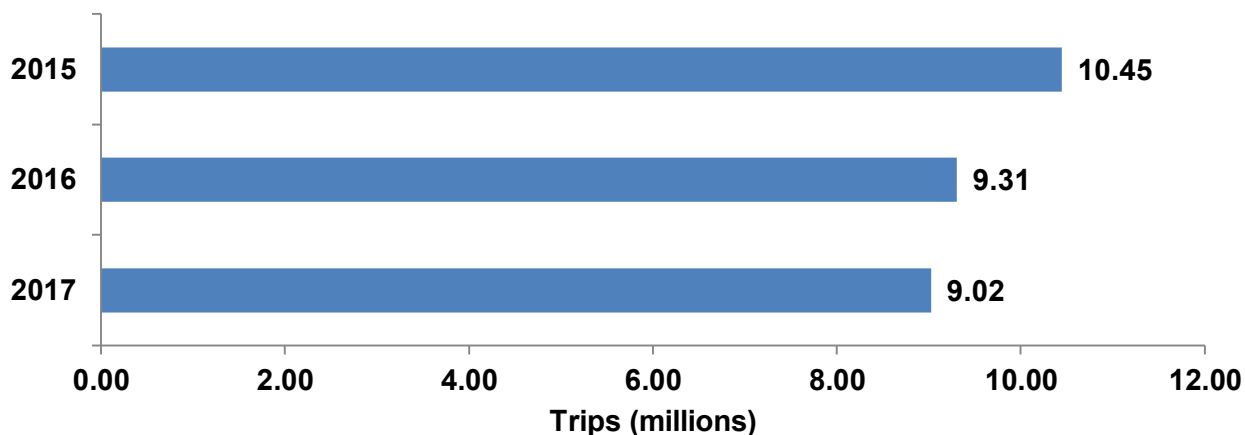


Figure 2: Nights spent in Wales for the 12 months ending December 2015, 2016 and 2017

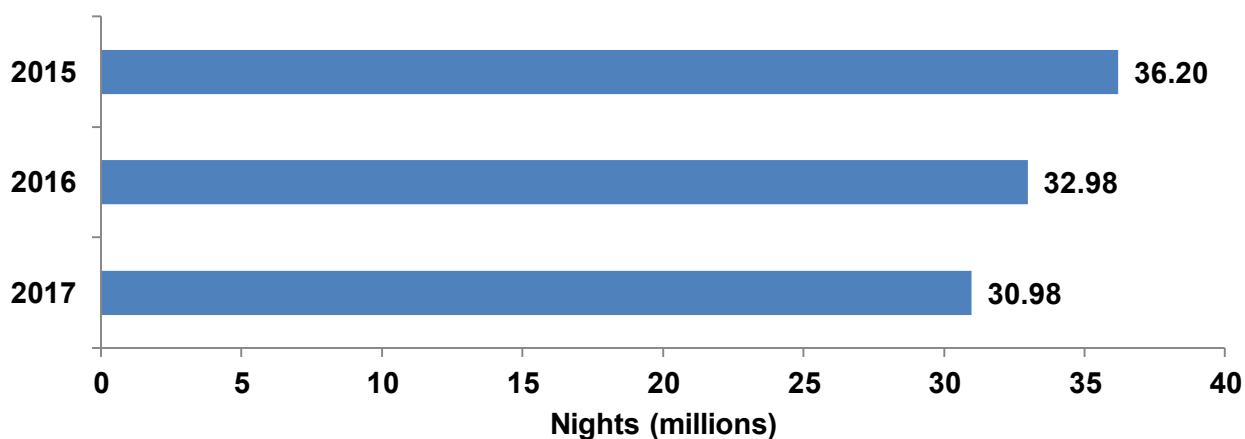
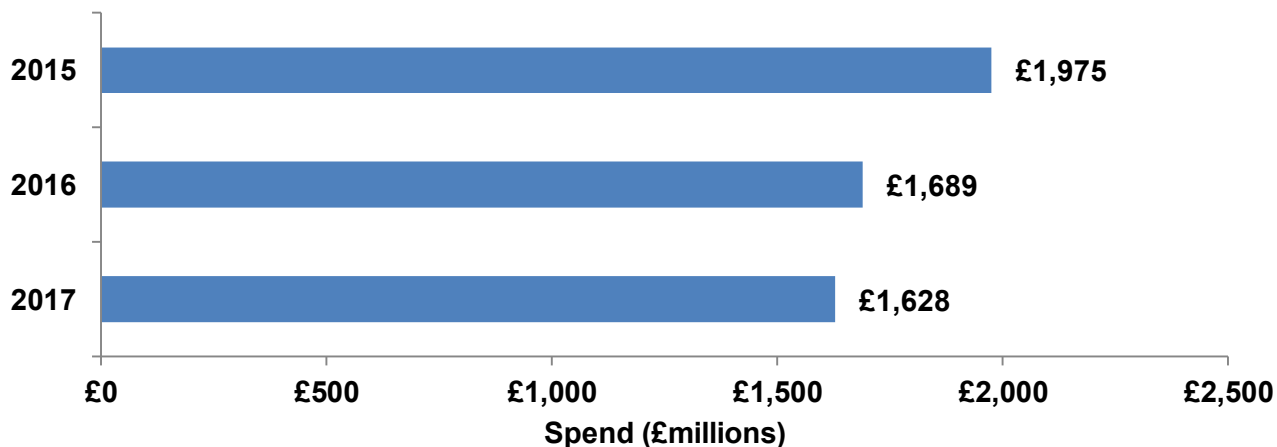


Figure 3: Expenditure in Wales for the 12 months ending December 2015, 2016 and 2017



Overnight domestic tourism to Wales by purpose of visit

Between January and December 2017 there were 5.71 million holiday trips taken to Wales by British residents, an increase of 2.2% from the same period a year previously. Expenditure decreased slightly by -1.8% to £1,203 million and the number of nights fell by -6.6% to 20.97 million.

Table 3: Holiday Trips to Wales

Wales	January - December 2016	January - December 2017	% change from year before
Trips (millions)	5.59	5.71	+2.2%
Nights (millions)	22.44	20.97	-6.6%
Spend (£ millions)	£1,225	£1,203	-1.8%

There were 2.37 million trips taken to visit friends and relatives between January and December 2017, a 10.1% decrease when compared to the previous year. Nights increased during 2017 by +1.8% to 6.91 million but spend has fallen by -13.4% to £233 million.

Table 4: Trips to Friends and Relatives in Wales

Wales	January - December 2016	January - December 2017	% change from year before
Trips (millions)	2.63	2.37	-10.1%
Nights (millions)	6.78	6.91	+1.8%
Spend (£ millions)	£269	£233	-13.4%

As in Britain as a whole, there continues to be a fall in overnight domestic business visitors to Wales. January to December 2017, when compared to 2016, experienced a fall in trips of 21.3% to 622,000 and a fall in the number of bednights by 37.8% to 1.53 million. In addition, spend also decreased by 6.2% to £136 million.

Table 5: Business Trips to Wales

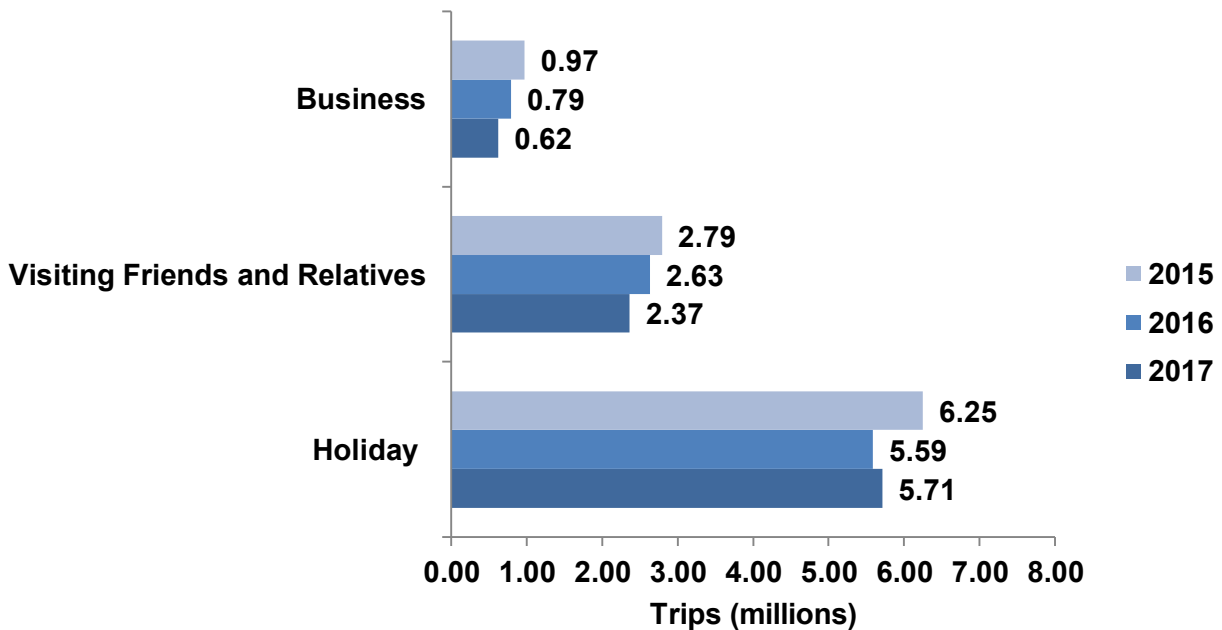
Wales	January - December 2016	January - December 2017	% change from year before
Trips (millions)	0.79	0.62	-21.3%
Nights (millions)	2.45	1.53	-37.8%
Spend (£ millions)	£145	£136	-6.2%

Year on year changes in purpose of visit

Figures 4 and 5 show a comparison of trip and spending levels by British residents to Wales, by purpose of visit, for the 12 months ending December 2015, 2016 and 2017.

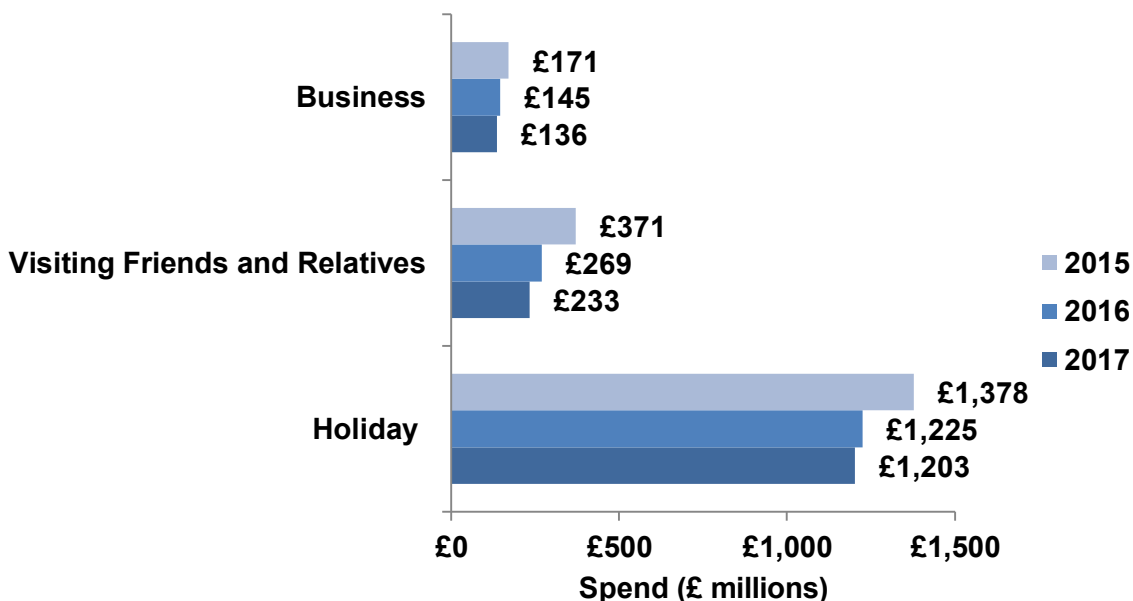
Between January 2017 and December 2017 there were 5.71 million holiday visitors, 2.37 million visits to friends and family and 622,000 business visitors. Holidays in 2017 have increased when compared to 2016 but are lower than the number of holiday trips in 2015. Business and visits to friends and relative have decreased compared to the 12 months ending December 2015 and 2016.

Figure 4: Number of trips to Wales by purpose of trip in the 12 months ending December 2015, 2016 and 2017



The levels of related expenditure for all three purposes of trip categories have fallen, with spend lower during the 12 months ending December 2017 than 2016, and even more so when compared to 2015.

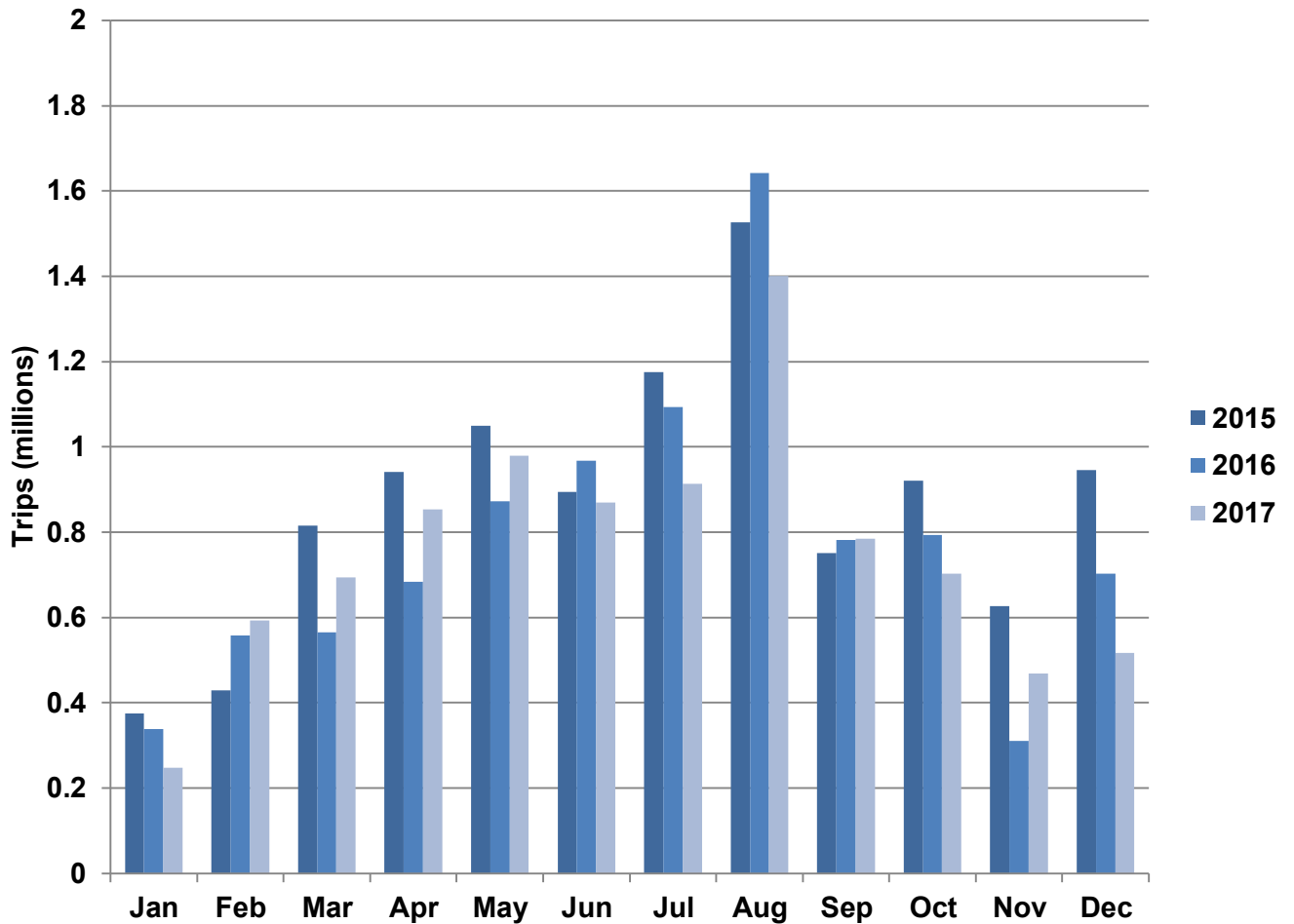
Figure 5: Expenditure on overnight visits to Wales by purpose of trip in the 12 months ending December 2015, 2016 and 2017



Seasonality of trips

When compared to 2016, 2017 saw increases in trips between February and May, as well as November. In addition, 2017 saw decreases in the number of trips during the summer months June, July and August when compared with 2016 and 2015. Similar decreases were seen during October and December 2017.

Figure 6: Monthly overnight trips for all purpose to Wales for 2015, 2016 and 2017



Trip characteristics

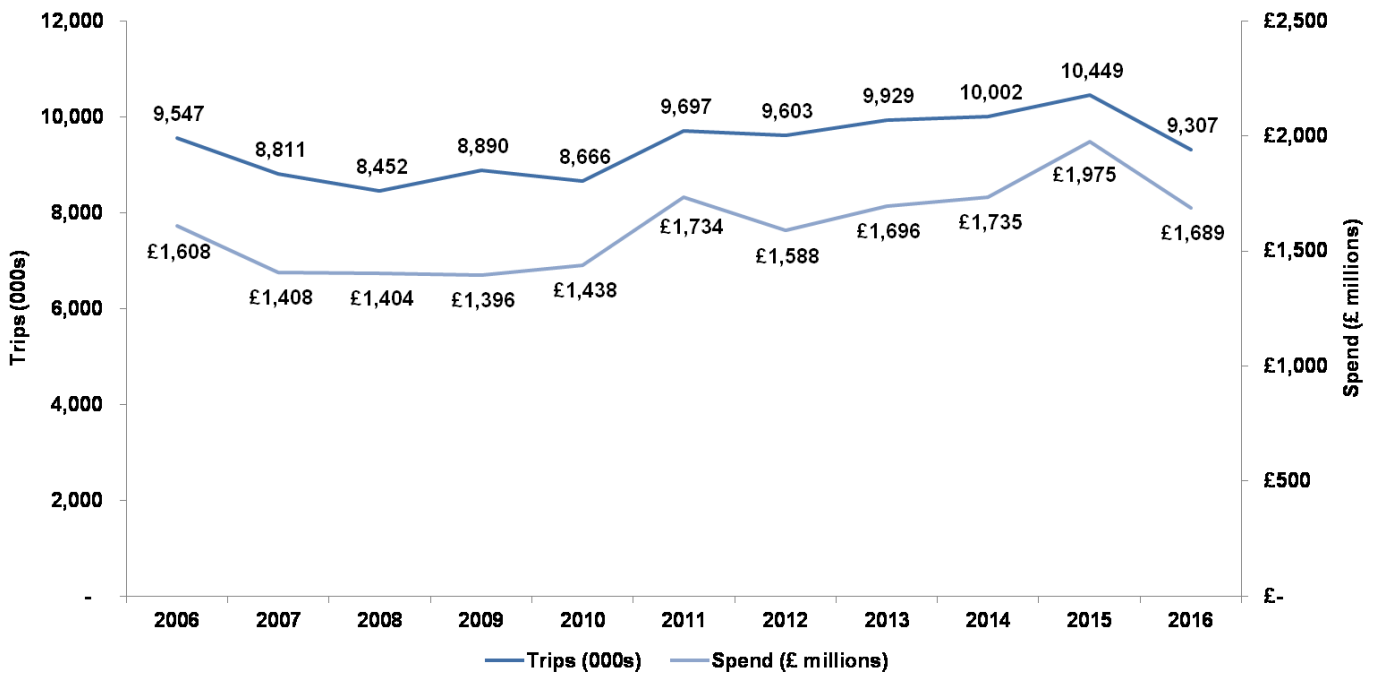
As seen in Table 6, there was a similar spend per trip between January to December 2017 and January to December 2016, but below the average spend per trip for 2015. Average length of stay has fallen slightly during January to December 2017 compared to 2015 and 2016.

Table 6: Average length of stay and spend on overnight domestic GB trips to Wales

All trip purposes	January - December 2015	January - December 2016	January - December 2017
Nights per trip	3.46	3.54	3.43
Spend per trip (£)	£189	£181	£180

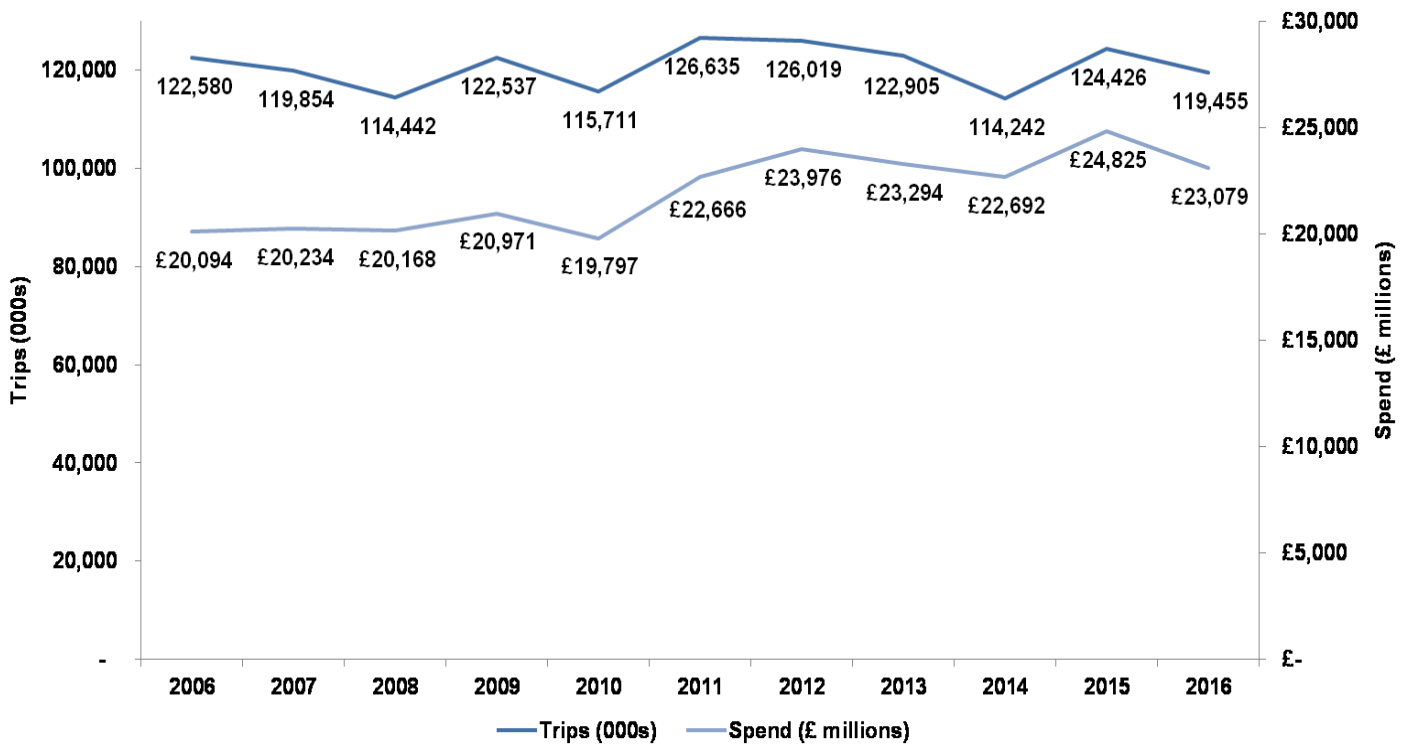
Longer term trends

Figure 7: Domestic overnight visitor numbers and expenditures for Wales by all purpose of visit from 2006 until 2016



There was a fall in overnight domestic trips and spend in Wales in 2016 following three years of continuous growth.

Figure 8: Domestic overnight visitor numbers and expenditures for Great Britain by all purpose of visit from 2006 until 2016



There was also a fall in domestic overnight trips and spend across Great Britain as a whole in 2016 although these have fallen by a smaller proportion than trips and spend to Wales.

Context

Weather

Overall, January to December 2017 was slightly warmer than the same period a year previously in both Wales and Great Britain as a whole. Moreover, there was more rainfall in Wales and Great Britain in 2017 when compared to 2016.

Figure 9: Average Mean Temperature for Wales and GB in Celsius, January to December 2016 and 2017

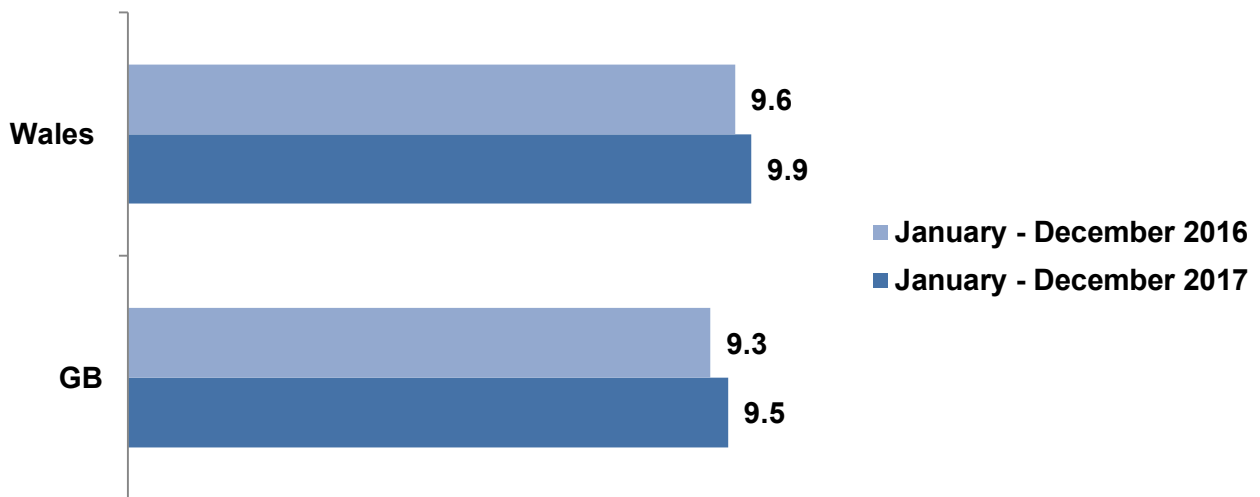
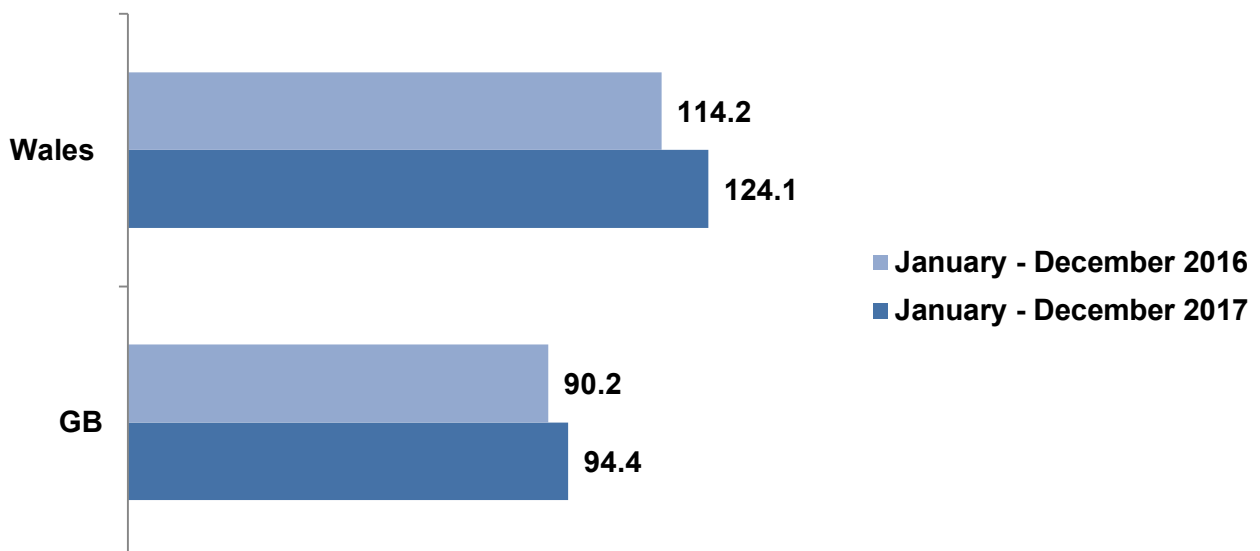


Figure 10: Average Mean Rainfall for Wales and GB in Millimetres, January to December 2016 and 2017



Source: [Met Office](#)

Exchange rates

Figure 11: Average Exchange Rates for Euro and US Dollar into Pound Sterling, January to December 2016 and 2017



The value of the pound against both the Euro and the dollar has weakened considerably towards the end of 2016 and following through into 2017.

Foreign currency having a high value compared to the pound tends to be advantageous for both inbound and domestic tourism as it becomes cheaper to come to the UK from abroad and more expensive for UK residents to go on holiday overseas.

Source: [Bank of England](#)

Other

There have been numerous terrorist attacks both within the UK itself and in the rest of Europe in recent years. This could possibly dissuade international visitors from visiting Wales as well as also discouraging UK residents from travelling abroad.

Key quality information

Relevance

What are the potential uses of these statistics?

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

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

Who are the key potential users of this data?

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

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

Timeliness and punctuality

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

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

Accessibility and clarity

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

Comparability and coherence

Owing to the shift from reporting year to date figures to reporting 12 month rolling totals, this release is not comparable with releases published before May 2016. This release is comparable with releases published after May 2016, and with the releases published by Visit England, available on the [Visit Britain website](#).

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:

<http://gov.wales/statistics-and-research/great-britain-tourist-survey/?lang=en>

Next update

The full year results for the Great Britain Tourism Survey 2017 will be published as part of the new combined quarterly tourism statistics report which is due to be published in May 2018 – final date to be confirmed.

We want your feedback

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

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