

Great Britain Day Visits Survey 2013 – Wales summary

This update summarises the top line results of the Great Britain Day Visits Survey 2013 in respect of Wales. Full results for all parts are published in the compendium report The GB Day Visitor 2013.

The Great Britain Day Visits Survey (GBDVS) has been undertaken jointly with Visit England and Visit Scotland and is the source of official statistics on day visits by British residents to destinations throughout Britain.

2013 was the third year of the survey and took the form of 35,085 online interviews throughout Britain during the course of the year, with the Wales resident sample boosted to approximately 5,000.

Tourism day visits are defined as of 3 hours+ duration (including travel time), for leisure purposes, non-routine and (with the exception of visits to tourist attractions and special events) outside the place of residence or workplace.

Main results for Wales

- 89 million tourism day visits were made by British residents to destinations in Wales in 2013, generating expenditure of £3.061billion. The volume of trips is 12% down in comparison with 2012 (101 million). For comparison, the total volume of day visits in GB as a whole was down by 7% and that for Scotland down 13% down in comparison with 2012.
- In 2013 average spend per person per day trip in Wales was £34, on a par with the average expenditure on day trips in Britain as a whole.
- As in 2012, Wales' share of all tourism day visits made by British residents to destinations in Great Britain in 2013 was 6%. Wales' share of all expenditure on such trips was also 6%.
- Day visits to destinations in Wales are significant throughout the year. In 2013 some 19% of the annual total was taken in the January-March quarter, 26% in the April-June quarter, 34% in the peak July-September quarter and 20% in the fourth October-December quarter (percentages rounded to nearest whole numbers.) This pattern is similar to that of 2011 and 2012.
- The duration of day visits to destinations in Wales (including travel time) is as follows:

More than 3 hours but under 4 hours	39 million
4 hours + but under 5 hours	18 million
5 hours + but under 6 hours	11 million
More than 6 hours	21 million

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This distribution pattern is similar across Britain, though 44% of visits to Wales were in the 3 to 4 hours category compared with a GB average of 39%.

- With regard to mode of transport, in 2013 75% of day visits to Wales were made by car, 7% by train, 7% on foot and 6% by public bus/coach or coach tour.
- The regional distribution of day trips within Wales is as follows:

North Wales	19 million
Mid Wales	14 million
South West Wales	18 million
South East Wales	37 million

The dominance of South East Wales reflects the much larger local population and the urban destinations in the region.

- 78% of day visits originate within Wales itself, underlining the significance of the resident market. The regions of Wales show different visitor origin patterns. In North Wales, roughly half of day visits originate outside Wales, with some 4 million visits from the adjacent North West of England. In South East Wales, almost two-thirds of day visits originate within the region itself, reflecting the region's much higher population density.
- The breakdown of expenditure by the main categories was as follows:

Transport	25%	(of which Fuel 17%)
Eating and drinking	40%	(of which Cafés/Restaurants 35%)
Entrance charges	11%	(of which Attractions 3%, Events/Shows 4%)
Special shopping	20%	

Contextual information

The GBDVS results for Wales underline the significance of day visits in the overall context of tourism in Wales. Although the volume of day trips to Wales in 2013 fell by 12%, there was a general fall in day visits in Britain as a whole (down 7%), while Scotland's day visits were down by 13%.

Further, in 2013 Wales' staying holiday visits were 3.4% up compared with 2012 in terms of trips and 11.5% up in respect of expenditure (recorded in the Great Britain Tourism Survey 2013). This suggests that in 2013 there was some 'switching' from day visits to staying visits, encouraged by the excellent weather in July and August 2013. This is also true of the fall in expenditure on day visits to Wales in 2013, with increases in expenditure by staying visitors being recorded in the Great Britain Tourism Survey. It is also likely that the 2012 day visit expenditure total were influenced by estimates by respondents in respect of increased transport costs (including fuel), which accounted for 24% of total day visit expenditure in that year.

Key Quality Information

The 2013 Great Britain Day Visit Survey (GBDVS) was commissioned jointly by the national tourist boards of VisitEngland (VE), VisitScotland (VS) and Visit Wales (the Tourism Department of the Welsh Government) and undertaken by research agency TNS. The survey aims to measure the volume, value and profile of Tourism Day Visits taken by GB residents to destinations in England, Scotland, Wales and Northern Ireland.

GBDVS 2013 was conducted using an online methodology with 35,085 interviews conducted with adults aged 16 and over 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 representivity of the achieved sample. Final results were then weighted to further improve the representivity of the outputs. The weighting solution used was developed for the survey by TNS, informed by a significant programme of parallel off-line interviewing in the first year of the survey involving over 6,000 in-home interviews.