

Key Facts on UK Domestic Tourism



North Wales

- North Wales accounts for 37% of all trips and 35% of all spend in Wales
- 87% of visits to North Wales are for holiday purposes
- 40% of visitors are residents of the North West of England
- Caravans are the accommodation type used on almost 30% of visits
- 43% of trips are taken during the July to September period

Mid Wales

- Mid Wales accounts for 17% of all trips and 17% of all spend in Wales
- Caravans are the most popular type of accommodation in Mid Wales (over 30%)
- 34% of visitors are residents of the West Midlands
- The average length of stay is 4.1 nights
- Mid Wales visitors have a slightly older age profile than the Wales average

South West Wales

- South West Wales accounts for 19% of all trips and 19% of all spend in Wales
- 35% of visitors originate from Wales
- 28% of visitors stay for longer than 8+ nights
- 30% of visitors stay with friends and relatives whilst 24% stay in caravans
- 30% of visitors to the region fall within the 35 to 45 age bracket, slightly more than the Wales average

South East Wales

- South East Wales accounts for 26% of all trips and 27% of all spend in Wales
- The highest proportion of 1-3 night short stays (71%) can be attributed to the high proportion of non holiday trips to the region (45%)
- Over 40% of visitors use serviced accommodation
- 14% of visitors come by train.
- Seasonality is less marked with business more evenly spread throughout the year

(More detail on UK domestic tourism is available on pages 2-5)

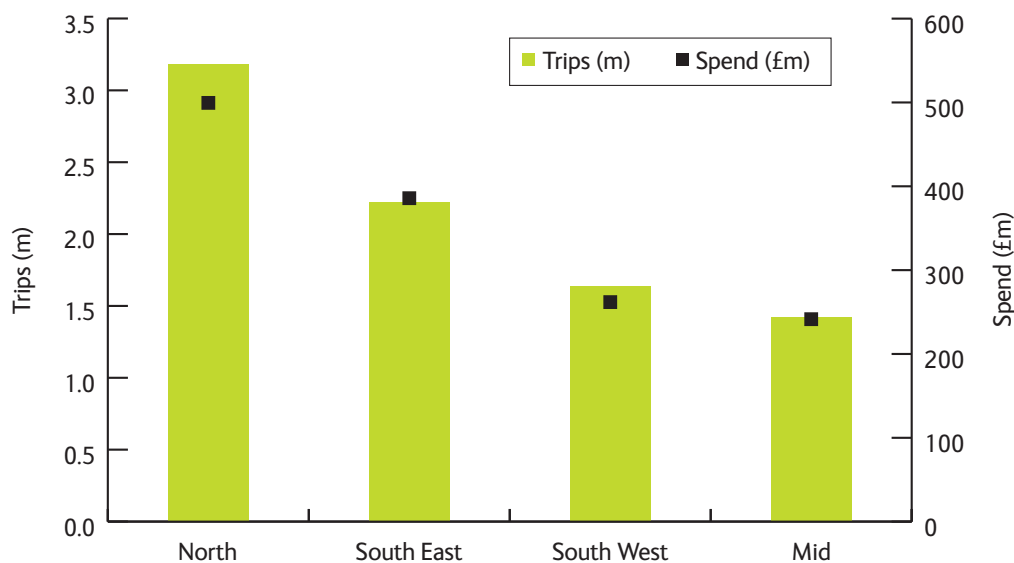
- South East Wales has the largest share of overseas visitors: 48% in 2008
- In 2008, Overseas visitors stayed for an average of 8.9 nights in South West Wales, compared with an average of 7.4 nights for Wales as a whole
- In 2008, Ireland was the leading country of origin for overseas visitors to North, Mid and South West Wales, though France was top of the list in South East Wales
- In 2008, Mid Wales had the most marked seasonal pattern in respect of international visits: 54% of such visits took place during the July-September period, compared with 35% for Wales as a whole and just 28% in South East Wales

(More detail on international tourism is available on pages 6-8)

Key Facts on International Tourism



Volume and value of UK domestic tourism to the Welsh regions



North Wales attracts more visitors and spend per year from domestic tourists, compared to the other regions of Wales.

	Wales	North	Mid	South West	South East
Trips (m)	8.49	3.18	1.42	1.64	2.22
Nights (m)	31.9	11.98	5.70	6.72	6.77
Spend (£m)	1411.25	499.50	241.50	261.86	385.81
Trips (% share)	100	37	17	19	26
Nights (% share)	100	38	18	21	21
Spend (% share)	100	35	17	19	27

UK domestic tourism – Average expenditure and length of stay

	Wales	North	Mid	South West	South East
Average spend per trip (£)	166	157	170	160	174
Average spend per night (£)	44	42	42	39	57
Average length of stay (nights)	3.76	3.77	4.01	4.1	3.05
1 night (% share)	14	9	13	8	26
2-3 nights (% share)	37	35	32	32	45
4-7 nights (% share)	25	30	26	26	18
8+ nights (% share)	20	23	27	28	8

The South East has a significantly higher proportion of 1-3 night visitors than the other regions reflecting the higher number of business visits to the area. The higher spend per night can also be attributed to the business visitor.

Similarly the significance of the holiday market in the other regions is reflected by the longer average length of trip recorded.

UK domestic tourism – Purpose of trip

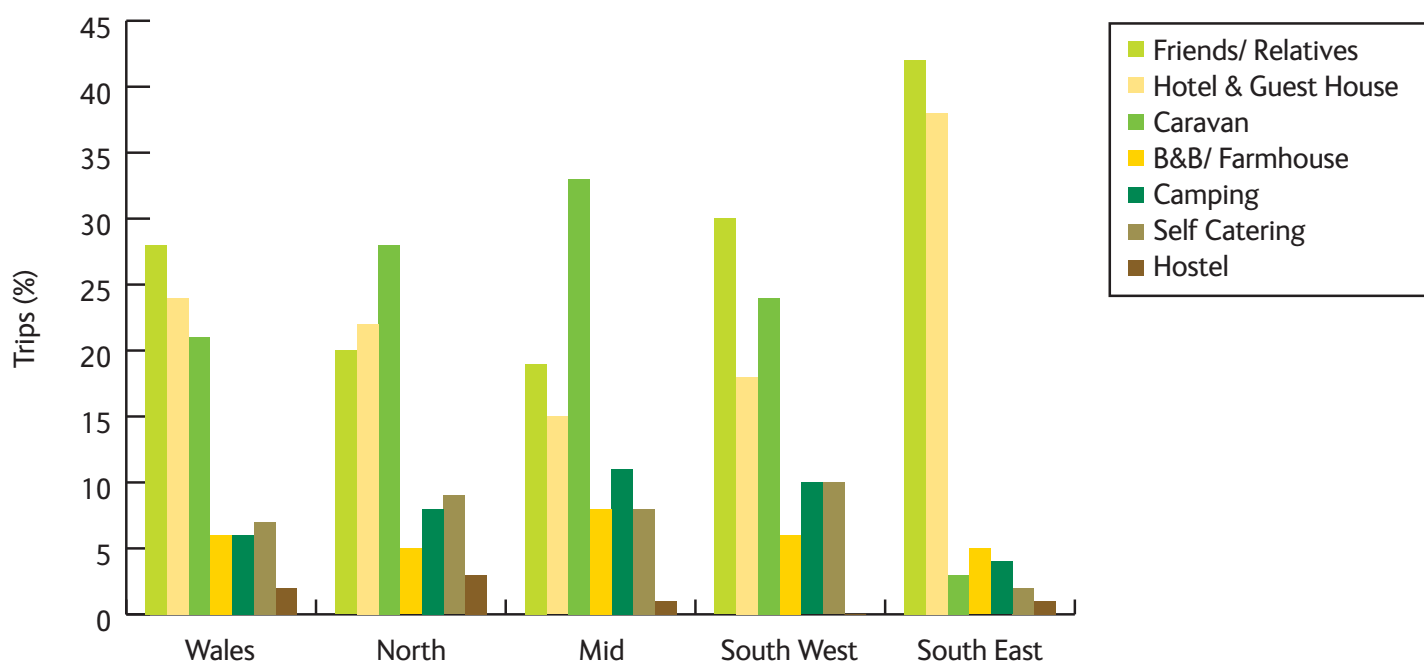
	Wales	North	Mid	South West	South East
Holidays (m)	6.56	2.76	1.2	1.34	1.23
Business/work (m)	0.85	0.18	0.1	0.12	0.42
VFR* (m)	0.91	0.22	0.12	0.13	0.49
Holidays (% share)	77	87	84	82	55
Business/work (% share)	11	6	8	8	22
VFR* (% share)	10	7	7	7	19

*VFR – Visiting friends and relatives non-holidays

Visitors to North, Mid and South West Wales show a similar pattern of visitor purpose with holiday trips accounting for between 82-87% of all trips. South East Wales has a significantly higher proportion of Business and work trips and non-holiday visits to friends and relatives.



UK domestic tourism – Main accommodation type used by region (% share of trips)



A significant proportion of North and Mid Wales visitors stay in caravans, reflecting the accommodation supply in these regions.

South East has the highest proportion of hotel and guesthouse accommodation usage.

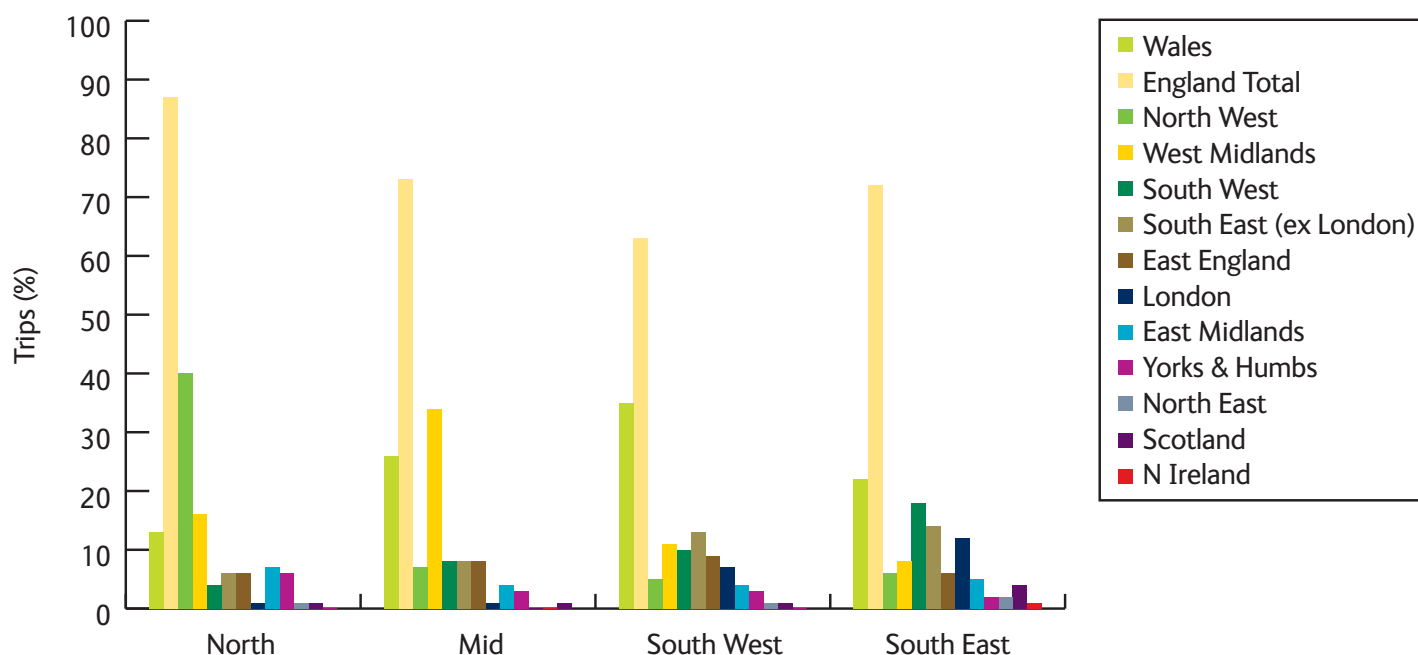
UK domestic tourism – Main mode of transport used on longest part of journey (trips)

	Wales	North	Mid	South West	South East
Car (m)	6.90	2.66	1.23	1.40	1.57
Train (m)	0.66	0.15	0.08	0.10	0.31
Coach/Bus (m)	0.38	0.19	0.04	0.04	0.10
Plane (m)	0.21	0.04	0.04	0.04	0.10
Car (% share)	81	84	86	85	71
Train (% share)	8	5	6	6	14
Coach/Bus (% share)	4	6	3	3	4
Plane (% share)	2	1	3	2	5



The relatively high proportion of rail-borne visitors to South East Wales reflects the well-developed rail links to the region.

UK domestic tourism – Region of residence (% share of trips)

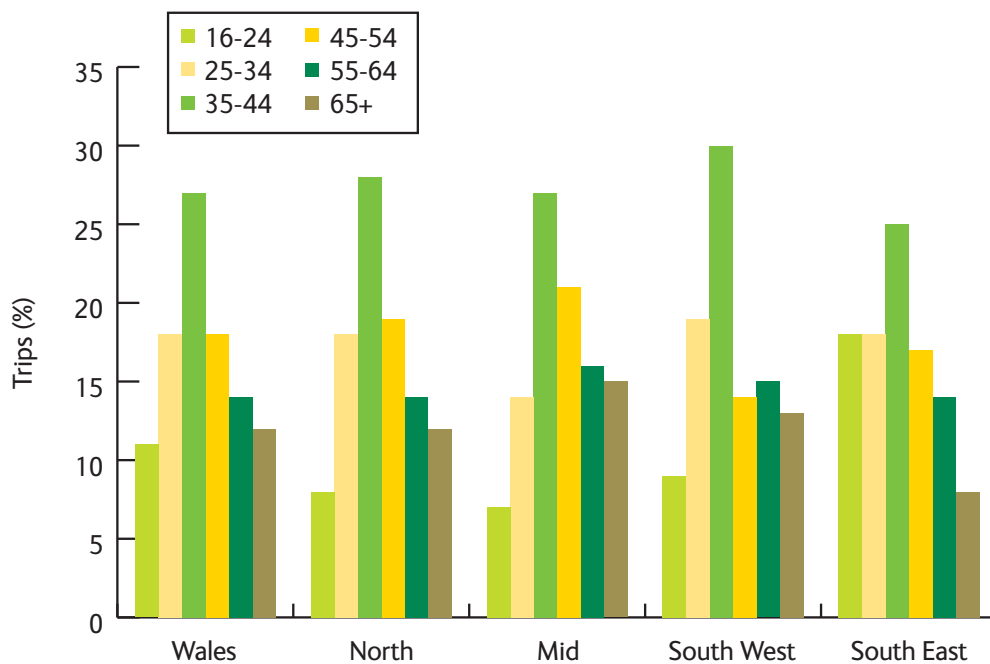


Proximity and ease of access to the destination is a significant factor when considering the region of residence of visitors. Visitors from the North West of England and the West Midlands account for around 56% of trips to North Wales, whilst the highest proportion of visitor to South West Wales and the South East originate from within Wales itself.

UK domestic tourism – Socio economic profile (trip % share)

	Wales	North	Mid	South West	South East
AB	35	36	32	36	35
C1	30	32	31	23	33
C2	18	16	19	20	17
DE	18	16	18	21	14

UK domestic tourism – Age profile (trip % share)



UK domestic tourism – Trip seasonality

	Wales	North	Mid	South West	South East
Jan-March (m)	1.56	0.41	0.20	0.28	0.67
April-June (m)	2.34	0.89	0.39	0.47	0.59
July-Sept (m)	3.13	1.36	0.61	0.66	0.50
Oct-Dec (m)	1.45	0.52	0.23	0.24	0.47
Jan-March (% share)	18	13	14	17	30
April-June (% share)	28	28	27	28	26
July-Sept (% share)	37	43	43	40	23
Oct-Dec (% share)	17	16	16	15	21

Reflecting the significance of the holiday market to the North, Mid and South West, over 40 % of all trips occur within the third quarter – the traditional holiday period.

The South East however displays a more evenly spread pattern of visits throughout the year which can be attributed to the greater variation in the main purpose of visits than the other regions.



ABC1s account for the majority of tourism trips to Wales, a pattern which is similar across the regions.



The 35-44 age bracket shows the highest tendency to visit Wales. However the South East has a younger profile of visitors and Mid Wales has a slightly older visitor profile in comparison with the Wales average.

Volume and value of international tourism to the Welsh regions 2008

	Wales	North	Mid	South West	South East
Trips (000s)	1,071	342	85	194	516
Nights (m)	7,931	1,808	627	1,731	3,744
Spend (£m)	312	84	17	56	154
Trips (% share)	100	32	8	18	48
Nights (% share)	100	23	8	22	47
Spend (% share)	100	27	5	18	49

Purpose of visit of international visitors and % share of trips

	Wales	North	Mid	South West	South East
Holidays (000s)	425	184	48	93	155
VFR* (000s)	388	105	27	73	193
Business/work (000s)	159	25	4	17	113
Other (000s)	87	23	5	9	49
All (000s)	1,071	342	85	194	516
Holidays (% share)	40	54	57	48	30
VFR* (% share)	36	31	32	38	38
Business/work (% share)	15	7	5	9	22
Other (% share)	8	7	6	5	10

*VFR – Visiting friends and relatives non-holidays

Holidays and visits to friends and relatives (VFR) together make up over three quarters of overseas visits to Wales. Business accounts for over one in five overseas trips to South East Wales.

Average expenditure and length of stay of international visitors

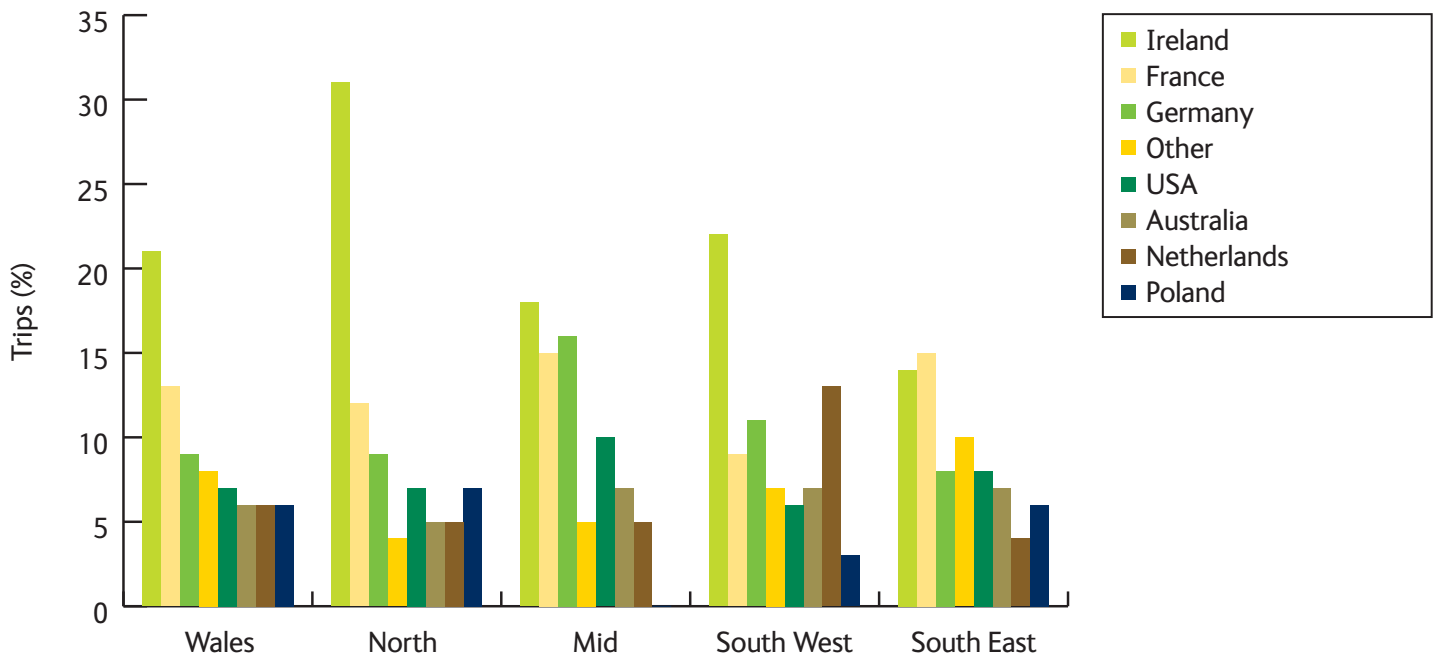
	Wales	North	Mid	South West	South East
Average length of stay (nights)	7.4	5.3	7.3	8.9	7.3
Average expenditure per trip (£)	291	246	197	287	299
Average expenditure per night (£)	39	46	27	32	41



South East Wales (48%) had by far the largest share of overseas visitors of all the regions. This is in part due to Cardiff's role as capital and also air and rail links to the region.

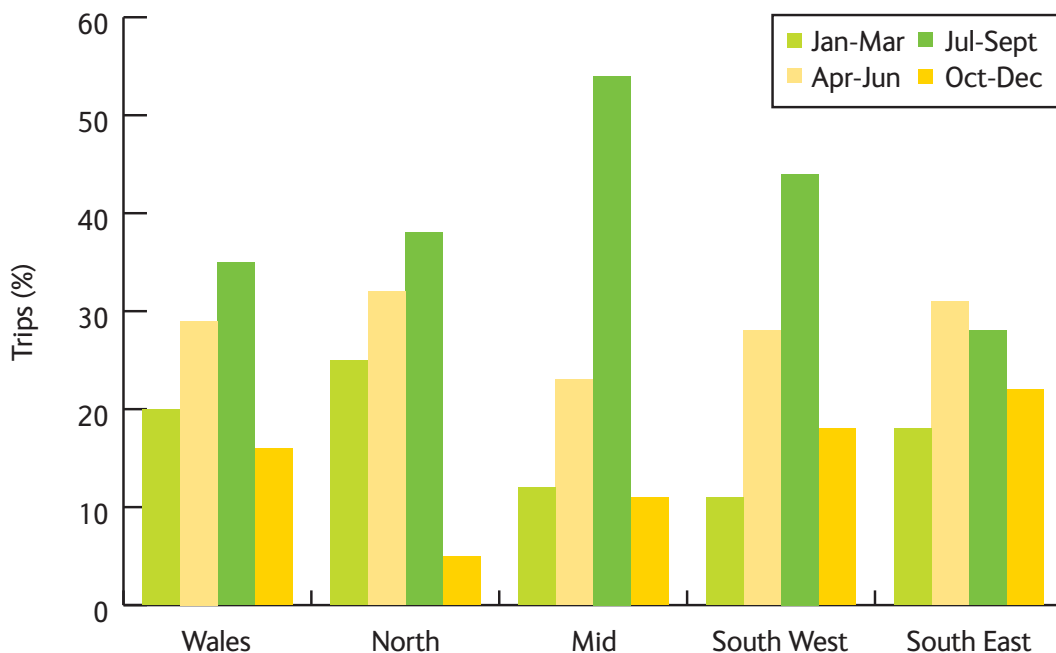


Region of origin of international visitors (% share of trips)



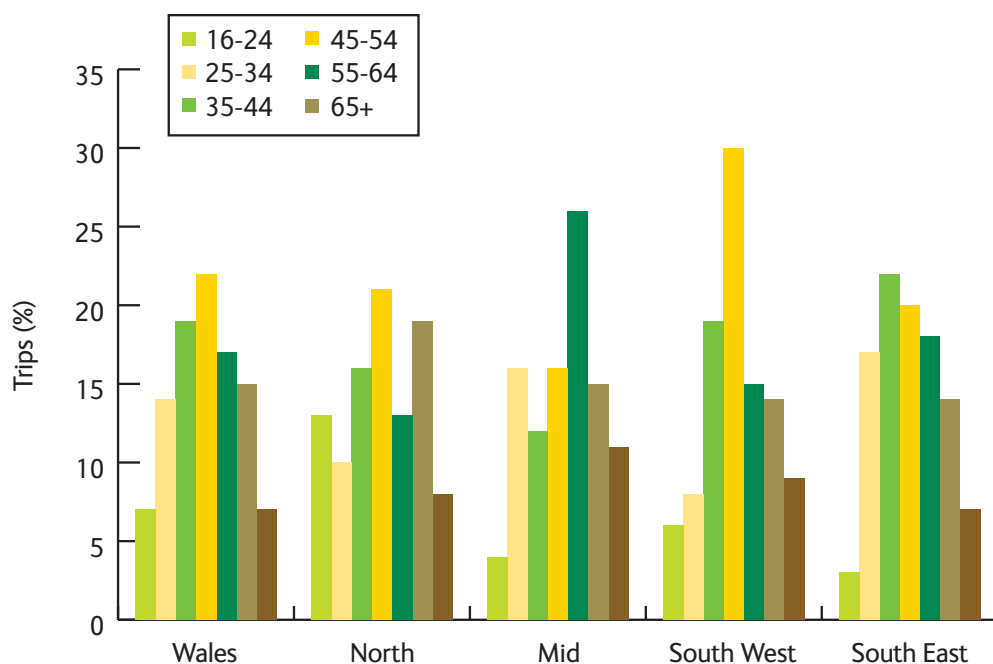
In 2008, visitors from Ireland made up the largest proportion of visitors to all regions except South East Wales, where the French were the most numerous.

Trip seasonality of international visitors (% share of trips)



Mid Wales shows the biggest summer peak of visitors while South East Wales has the most even seasonal pattern of visits.

Age profile of international visitors (% share of trips)



Of all the age groups, the 35-44 age bracket was the most numerous in respect of overseas visits to Wales in 2008. Mid Wales showed a generally slightly older overseas visitor profile.

Further information

Sources used in this publication:

United Kingdom Tourism Survey 2008 (pg 2-5)

International Passenger Survey 2008 (pg 6-8)

Note: Because of rounding, in all tables, individual percentages may not total 100% when added. Similarly, the sum of individual elements in a table may not equate to the total given.

Further information is available on the Visit Wales website at:

wales.gov.uk/topics/tourism/research/

or by contacting the Visit Wales Research Team:

Tel: **029 2047 5358/5288**

e-mail: tourismresearch@wales.gsi.gov.uk

Definitions:

'A tourist trip' is defined as a stay of one or more nights away from home for holidays, visits to friends or relatives, business/conference trips or any other purposes except such activities as boarding education or semi-permanent employment.

'Tourist nights' are those spent away from home using any type of accommodation, or in transit, on a trip.

'Tourist expenditure' is spending incurred while away from home on a tourist trip and on advance payments for such items as fares and accommodation.

