



This update summarises tourism performance by drawing upon Visit Wales' own research and information from other relevant sources. It is based upon information available April 2010.

### STAYING VISITORS FROM THE UK

**Table 1. UK overnight domestic tourism to Wales: January - December**

	<i>million</i>								
	Trips			Nights			Spend (£)		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Wales	8.49	8.95	5.42	31.90	32.88	3.07	1,411	1,413	0.14
England	95.53	102.95	7.76	295.38	312.91	5.94	16,433	17,281	5.16
UK	117.72	126.01	7.04	378.39	398.75	-0.59	21,107	21,881	0.04
Wales share of UK total	7.2%	7.1%		8.4%	8.2%		6.7%	6.5%	

Source: UKTS 2008, 2009 January – December, provisional figures

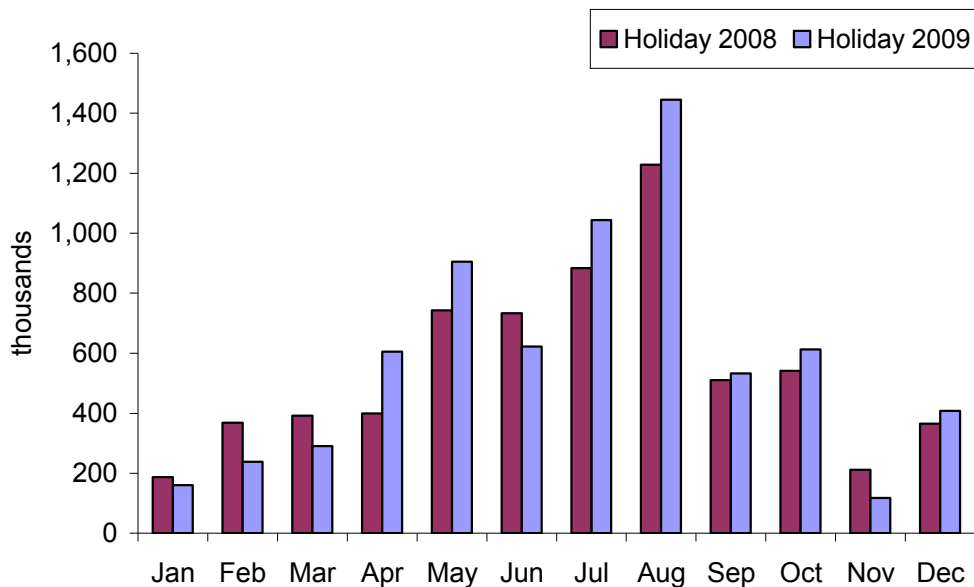
**Table 2. Monthly 2009 data compared to 2008**

		%								
		Month			2009 to date			Rolling 12 month		
		Trips	Nights	Spend	Trips	Nights	Spend	Trips	Nights	Spend
Wales	Jan	-16.2	-32.8	-57.6	-16.2	-32.8	-57.6	-0.4	-0.6	-0.7
	Feb	-32.8	-35.5	-26.3	-26.5	-34.5	-40.0	-1.2	-1.1	-0.5
	Mar	-30.7	-16.2	-36.3	-28.3	-26.4	-38.6	-1.2	-1.6	-1.5
	Apr	38.3	68.5	25.0	-10.7	1.2	-20.2	2.6	2.5	1.4
	May	9.2	-3.6	-7.3	-4.6	-0.6	-16.1	0.7	0.1	0.2
	June	-4.3	2.5	2.2	-4.5	0.1	-12.2	0.0	-0.9	0.3
	July	12.5	12.3	16	-0.8	2.5	-5.5	2.1	2.2	1.5
	Aug	18.6	6.5	24.2	3.5	3.7	1.2	1.7	2.3	1.8
	Sept	17.3	6.5	31.1	4.7	6.2	3.5	0.8	0.7	0.1
	Oct	10.3	6.2	-9.8	5.2	6.2	2.3	0.6	0.6	0.6
	Nov	-27.3	-52.6	-36.8	3.9	4.2	0.5	-1.0	-1.5	-1.5
	Dec	33.1	-14.3	-9.0	5.4	3.1	0.1	1.8	-0.8	-0.4

Source: UKTS 2008, 2009 January – December, provisional figures

- Performance in the first half of 2009 was not as good as in 2008 but the peak third quarter months of July, August and September all showed healthy increases over 2008.
- The net effect is that over the 12 months the totals trips were over 5% up in terms of trips, over 3% up in terms of nights and minimal increase in expenditure.
- Looking at year on year data since 2006, June and November show a declining trend for trips.

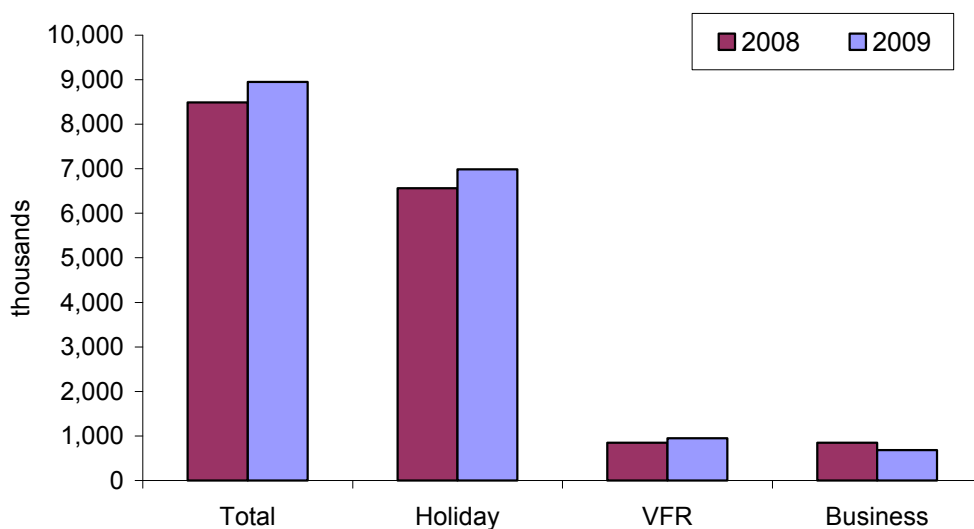
**Chart 1. Number of domestic overnight holiday trips by month**



Source: UKTS 2008, 2009 January – October, provisional figures

- Holiday Tourism trips, the mainstay of tourism in Wales, showed increases in the peak months of July, August and September, while April (due to Easter) and May were also well up.
- June has declined year on year since 2006

**Chart 2. Total number of trips by purpose for the 12 months**



Source: UKTS 2008, 2009 provisional figures

- During 2009, Holiday trips and Visits to Friends and Relatives increased in comparison with 2008.
- Overnight Business tourism fell, no doubt affected by the general economic climate.

## INTERNATIONAL VISITORS

**Table 3. Volume and Value of Overseas visitors to Wales**

	2005	2006	2007	2008	2009P
Trips (000)	964	1,106	973	1,054	934
Nights (000)	7,403	8,967	6,360	7,886	6,140
Spend (£m)	311	361	339	314	321
P=provisional	Source: Office for National Statistics, International Passenger Survey				

**Table 4. Overseas Visitors to Wales, 2005-2009P**

	Visits (000)				
	2005	2006	2007	2008	2009P
Total	964	1,106	973	1,054	934
Holiday	333	369	323	425	374
VFR	336	415	362	384	321
Business	181	226	194	158	163
Study	10	31	14	12	22
Other	114	96	94	87	76
P=provisional	Source: Office for National Statistics, International Passenger Survey				

- The number of overseas residents visiting Wales during 2009 is down in all purposes except business and study compared with 2008.

**Table 5. Origin of International visitors to the UK**

	November		Year to date		12 months to Nov	
	Visits (000)	% change 09/08	Visits (000)	% change 09/08	Visits (000)	% change 09/08
North America	220	14	3,320	-9	3,500	-10
EU15	1,380	3	16,180	-5	17,550	-5
A12	180	-15	2,420	-23	2,570	-25
Rest of Europe	130	-32	1,590	-17	1,720	-17
Rest of World	250	3	3,910	-6	4,170	-7
<b>Total Visits</b>	2,160	-1	27,420	-8	29,510	-9
	Spend (£m)	% change 09/08	Spend (£m)	% change 09/08	Spend (£m)	% change 09/08
<b>Total Spend</b>	1,155	-2	15,200	0	16,330	-2

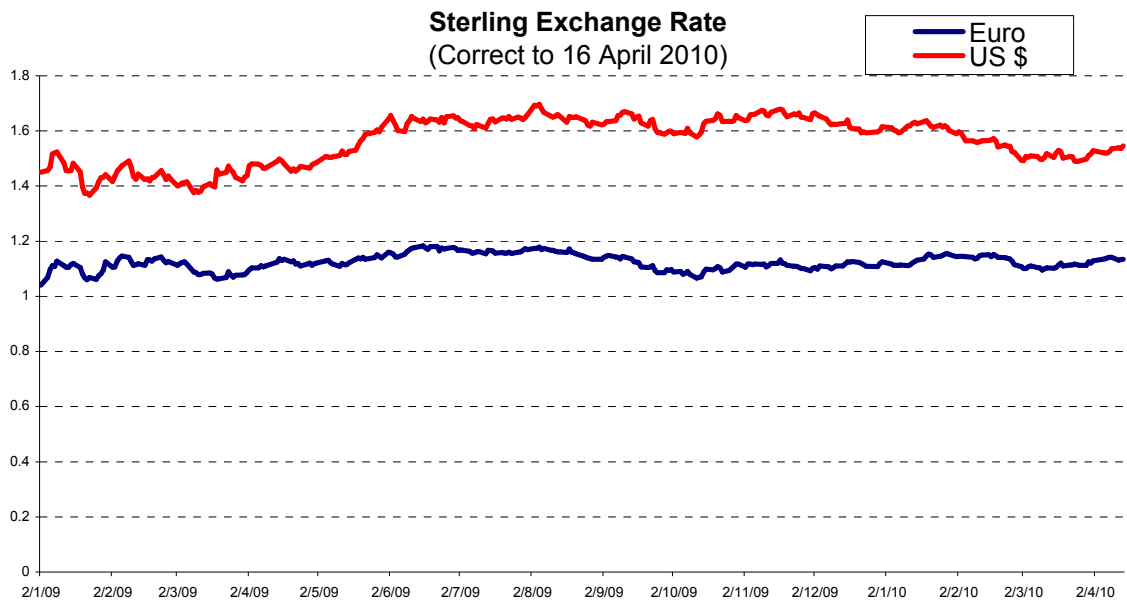
- The number of overseas residents visiting the UK in November 2009 was down 1% compared with 2008. Spending in November 2009 was 2% lower than the same month last year in nominal terms.

- The year-to-date picture is that 8% fewer overseas visitors came to the UK in 2009 compared to the same period of 2008. Total spending from January to November 2009 was the same as the equivalent 2008 period in nominal terms.

### Economic Context

- The Bank rate has remained unchanged at 0.5% since early March 2009.

**Table 7. Sterling Exchange Rate**



Source: Bank of England Daily Spot Rates

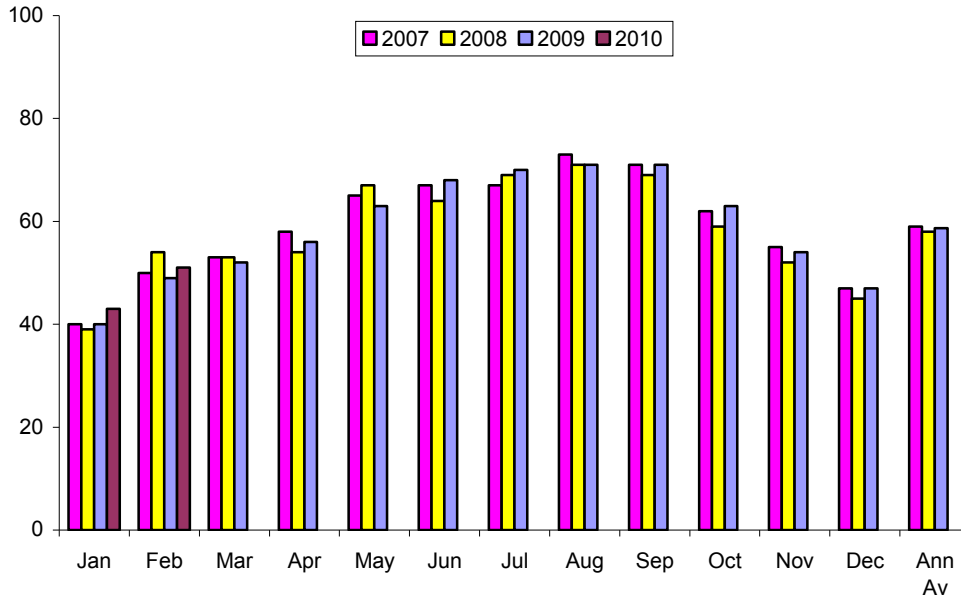
- Despite a slight rally over the summer months the pound has fallen against both the euro and the dollar over recent weeks.

## OCCUPANCY

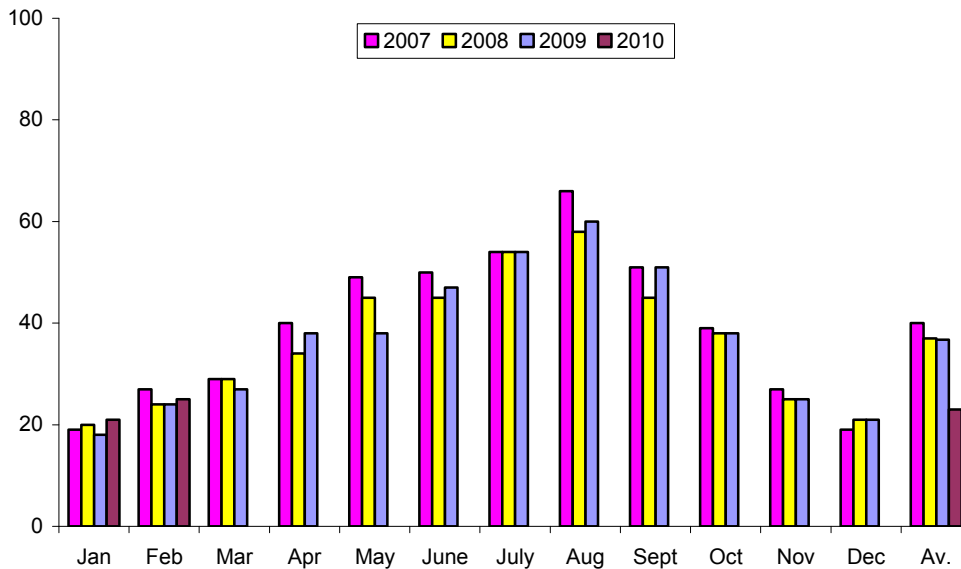
(Source: Visit Wales Occupancy Survey)

The Visit Wales Occupancy Survey is a monthly survey of a panel of establishments located throughout Wales. The provisional 2009 and 2010 occupancy figures are shown in figures in the following graphs:-

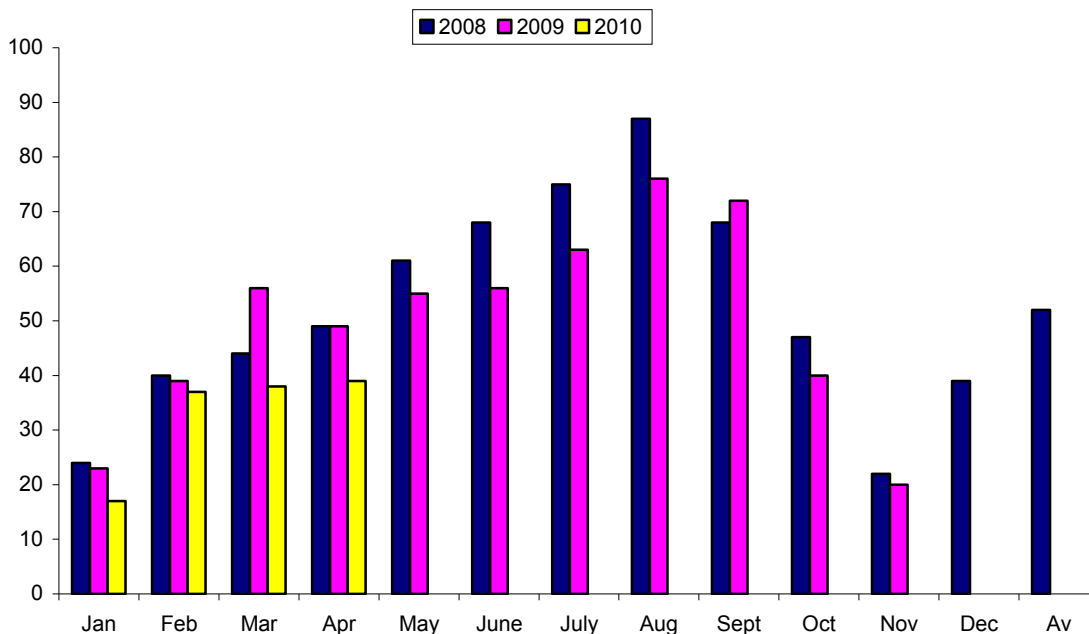
### Hotel Room Occupancy (%)



### Guesthouse/B&B Room Occupancy (%)

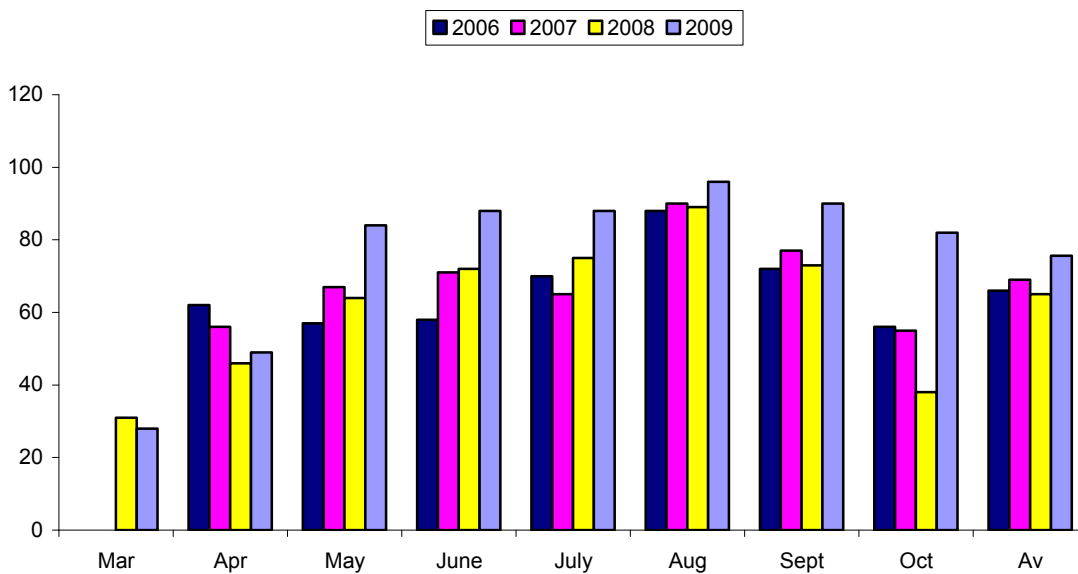


### Self Catering Occupancy (%)



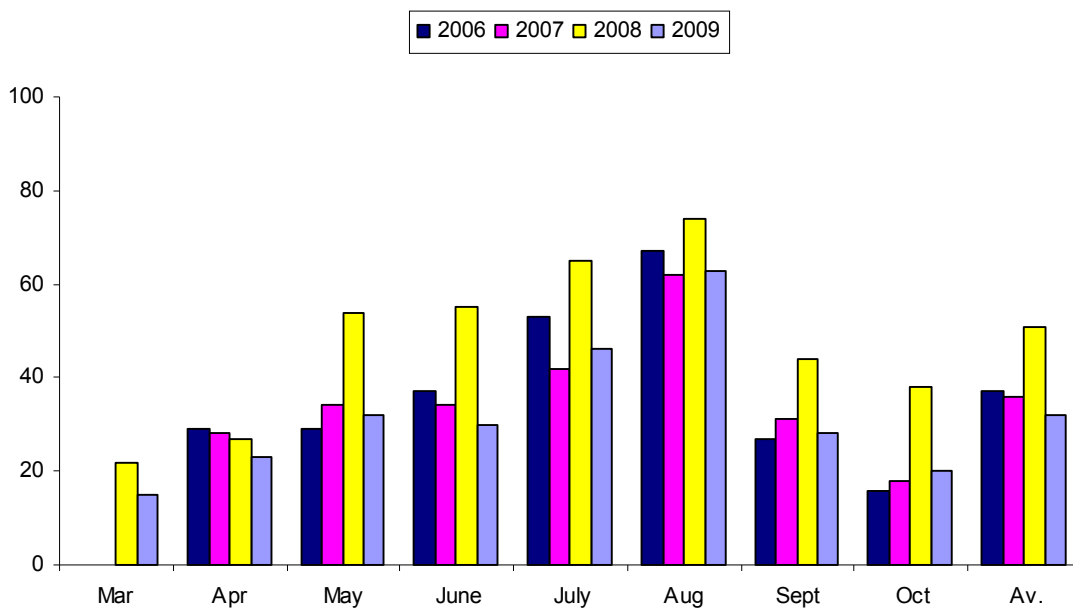
Note: Self catering occupancy is measured at the individual property level by expressing the number of weeks let each month as a proportion of the weeks and units available for rent.

### Caravan/Chalet/Holiday Home Occupancy

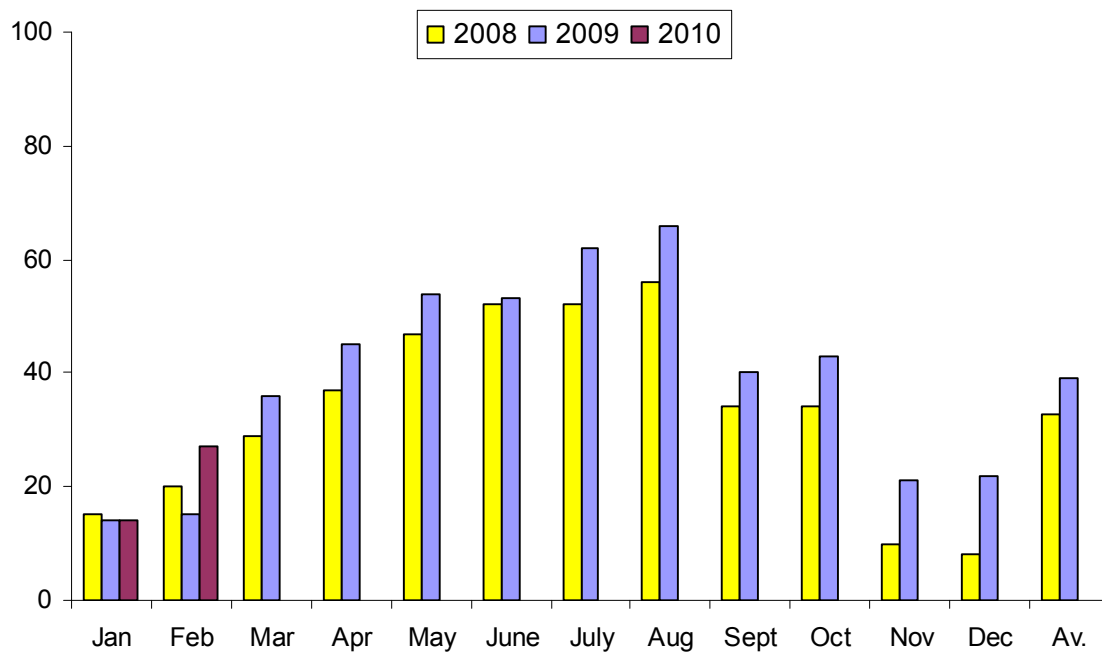


Note: Caravan/Chalet Holiday Home occupancy is measured as the percentage of available caravans and/or chalets occupied.

### Touring Park Occupancy



### Hostels



All 2009 monthly summaries reports on each sector are available at:  
<http://new.wales.gov.uk/topics/tourism/research/occupancy/monthlysummaries/?lang=en>

## **SURVEY OF TOURISM BUSINESSES**

(Source: Visit Wales Tourism Business Survey)

Visit Wales commissions a survey of a cross-section of 400 business 5 times a year, following Bank Holidays and other holiday periods. Below are some findings from the Easter 2010 report.

### **Visitor Numbers**

The Welsh tourism industry has not had a great Easter as the rain came at the wrong time. In the accommodation sectors fewer than one in six (16%) businesses have had more guests than last Easter, whereas about two in five (41%) have had fewer.

However the news is not all disappointing as more than one in three (35%) attractions have managed to increase their visitors numbers for Easter, compared to about one in four (27%) which have had a decrease.

### **Advance Bookings for 2010**

As things currently stand, the summer is looking good for the caravan & camping sector but ominous for serviced and self catering. Overall one in four (24%) accommodation businesses have more bookings than normal for the summer, but over two in five (42%) have fewer.

### **Visitor trends**

Repeat visitors are bringing stability to the industry. Nearly one in four (23%) operators have more advance bookings from repeat visitors than normal and well over half (57%) have the same level. However bookings levels for new, overseas and business visitors are all down on balance for this time of year.

### **Ryder Cup**

One in ten (10%) operators believe the Ryder Cup will have a positive impact on their business. These are mostly (73%) located in the south east.

Within south east Wales, about two in five (38%) operators believe the Ryder Cup will have a positive impact on their business and over half (57%) believe it will have no impact. The remainder (5%) don't know. No-one has said it will have a negative impact.

### **Confidence for the summer**

In spite of a disappointing Easter and low booking levels, confidence is high for the summer. One in three (33%) operators are very confident and half (51%) are fairly confident.

**If you would like further information on the above or would like to participate in any of our surveys/research, please contact us using the details shown below:**

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Tel: 029 2047 5358 / 029 2047 5288

<http://new.wales.gov.uk/topics/tourism/research/?lang=en>