



This update summarises tourism performance by drawing upon Visit Wales' own research and information from other relevant sources. It is based upon information available at 19th January 2010.

STAYING VISITORS FROM THE UK

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

	<i>million</i>								
	Trips			Nights			Spend (£)		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Wales	7.71	8.11	5.18	28.99	30.79	6.17	1,288	1,317	2.25
England	81.81	87.66	7.14	258.83	273.00	5.48	14,431	15,088	4.55
UK	101.35	108.04	6.59	332.55	350.87	5.51	18,571	19,246	3.63
Wales share of UK total	7.61%	7.51%		8.72%	8.76%		6.94%	6.84%	

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

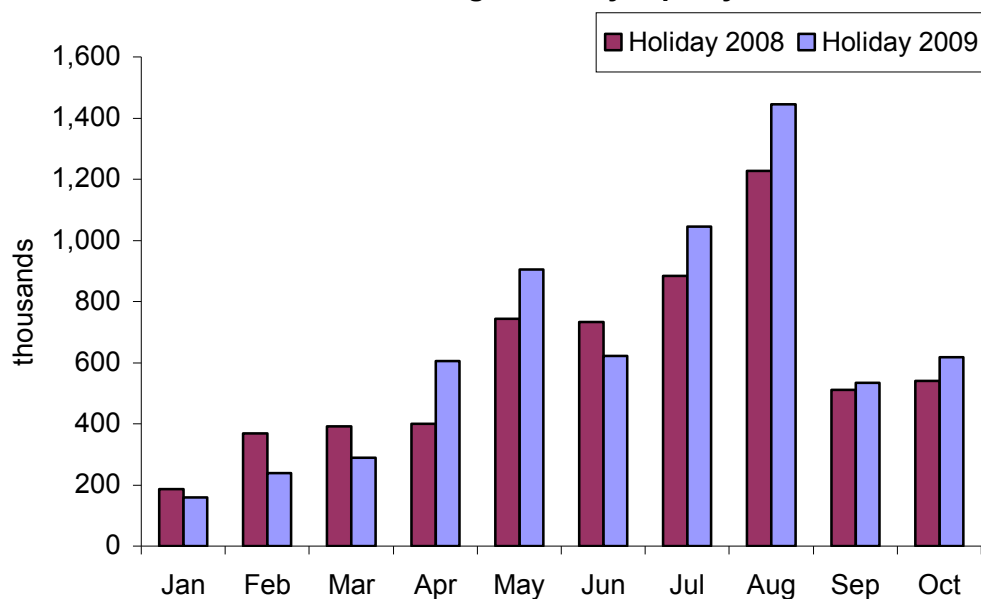
Table 2. Monthly 2009 data compared to 2008

		<i>%</i>								
		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

Source: UKTS 2008, 2009 January – October, 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 January-October period as a whole, the totals were over 5% up in terms of trips, over 6% up in terms of nights and 2.3% up on expenditure.
- Figures for the fourth quarter will of course have some impact but on the basis of the first three quarters' results, year-end 2009 totals will exceed those of 2008.

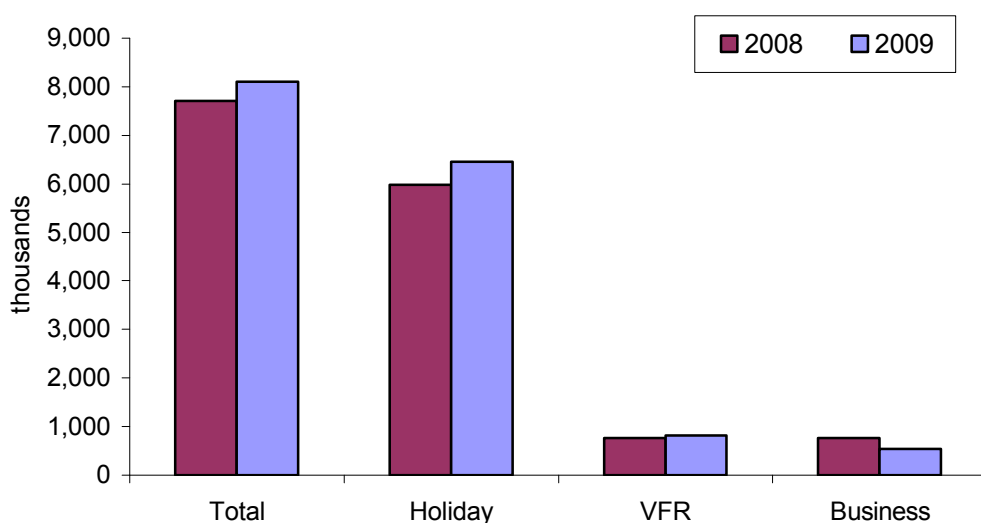
Chart 1. Number of domestic overnight holiday trips by month



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.

Chart 2. Total number of trips from January to October by purpose



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

- During the January-October period in 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. Number of overnight visits to Wales

	2008				2009P			
	Q1	Q2	Q3	Total	Q1	Q2	Q3	Total
Visits ^(a)	206	311	379	896	162	228	379	769
Nights ^(a)	1,285	1,766	3,380	6431	1,117	1,540	2,487	5144
Spend (£m)	48	89	119	256	79	70	124	273

P = provisional

Source: IPS 2009, January – August, provisional figures

(a) thousands

Table 4. Number of overnight visits to Wales by purpose (000)

	2008				2009P			
	Q 1	Q 2	Q 3	Total	Q 1	Q 2	Q 3	Total
Holiday	32	152	198	382	38	100	200	338
VFR	115	82	113	310	56	79	110	245
Business	44	48	32	124	44	30	36	110
Other	15	22	30	67	16	14	27	57
Study	-	6	5	11	7	5	6	19
Total	206	311	379	896	162	228	379	769

P = provisional

Source: IPS 2009, January – August, provisional figures

- The number of overseas residents visiting Wales during the 9 months of 2009 is down in all purposes compared with 2008. Spend however shows an increase.

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
Total Visits	2,160	-1	27,420	-8	29,510	-9
	Spend (£m)	% change 09/08	Spend (£m)	% change 09/08	Spend (£m)	% change 09/08
Total Spend	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.

Table 6. Visitor figures to the National Museums of Wales

	2008	2009	% change
Cardiff	314,802	348,315	+11
St Fagan's	592,894	606,243	+2
Roman	61,211	61,631	+1
Wool	23,345	25,869	+11
Slate	120,115	132,933	+11
Big Pit	160,533	160,564	+0
Waterfront	197,108	239,167	+21
TOTAL	1,470,008	1,574,722	+7

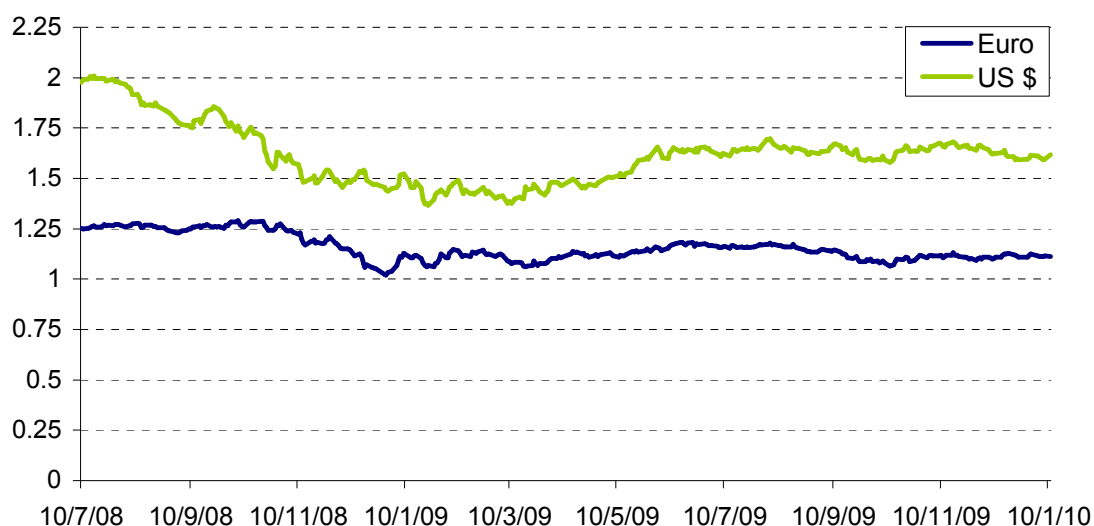
Source: <http://www.museumwales.ac.uk>

- During January to September 2009 the National Museums received 1,574,722 visitors, up 7% on the equivalent period in 2008.
- The National Waterfront Museum year to date visitor figure is 21% up on 2008.

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

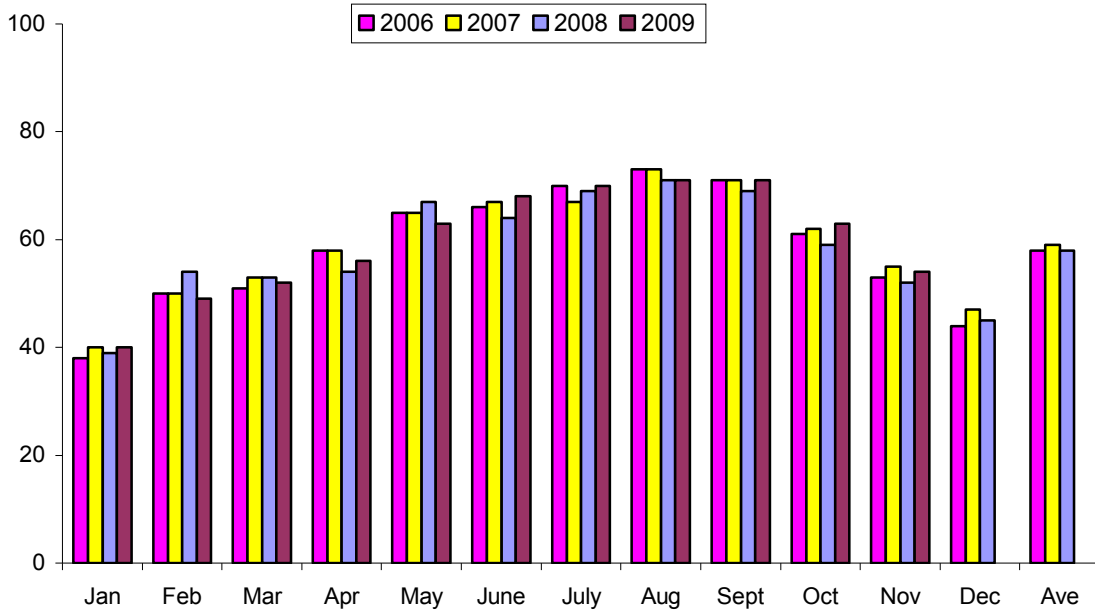
- Despite a slight rally over the summer months the pound has fallen against both the euro and the dollar over recent weeks.

OCCUPANCY

(Source: Visit Wales Occupancy Survey)

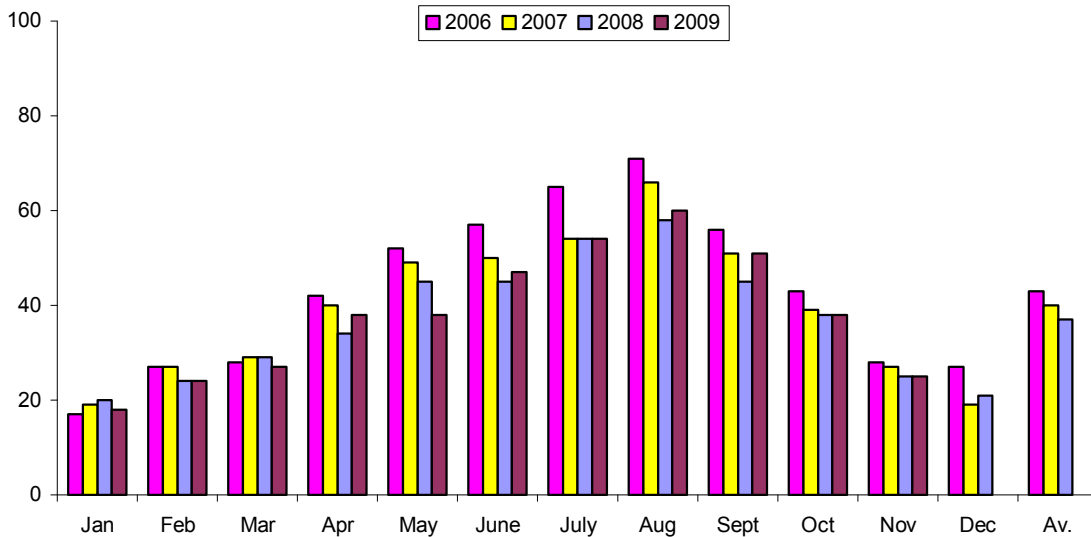
The Visit Wales Occupancy Survey is a monthly survey of a panel of establishments located throughout Wales. The provisional 2008 occupancy figures are shown in figures in the following graphs:-

Hotel Room Occupancy (%)



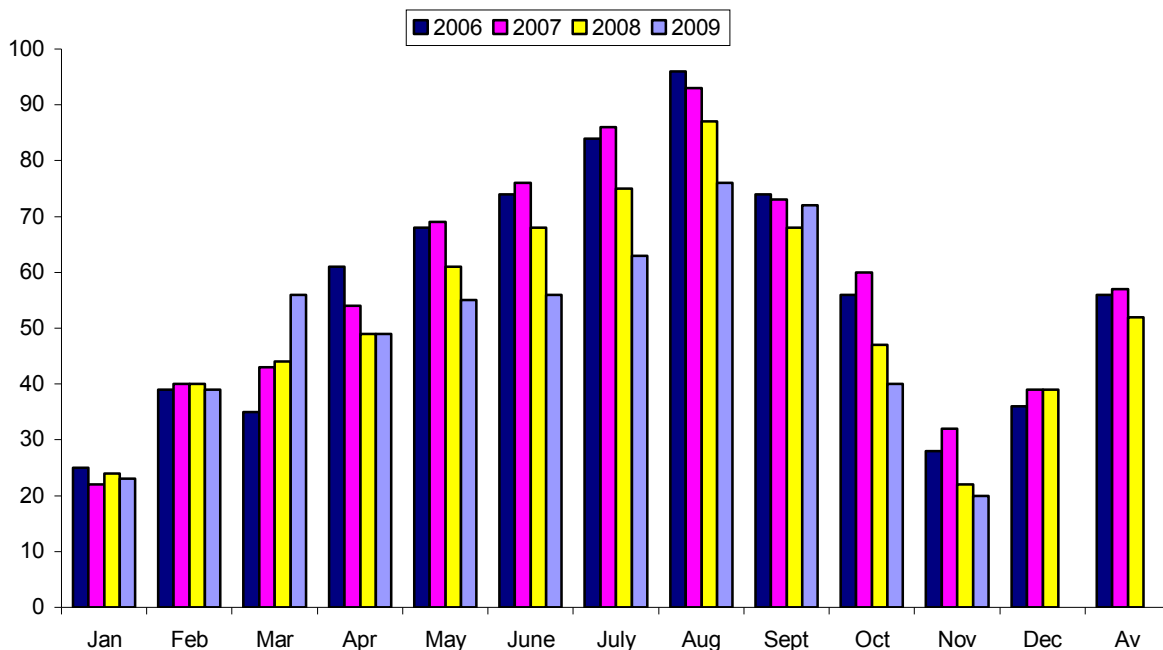
Monthly Room occupancy rates have been an average of 2% better in the June-October period in 2009 compared with 2008.

Guesthouse/B&B Room Occupancy (%)



GH & BB monthly room occupancy rates were slightly down in the January-May period, though April was up because of Easter. However, in the June to October period in 2009, the occupancy rates have been a few percent up overall, with similar rates to 2008 recorded in August, October and November.

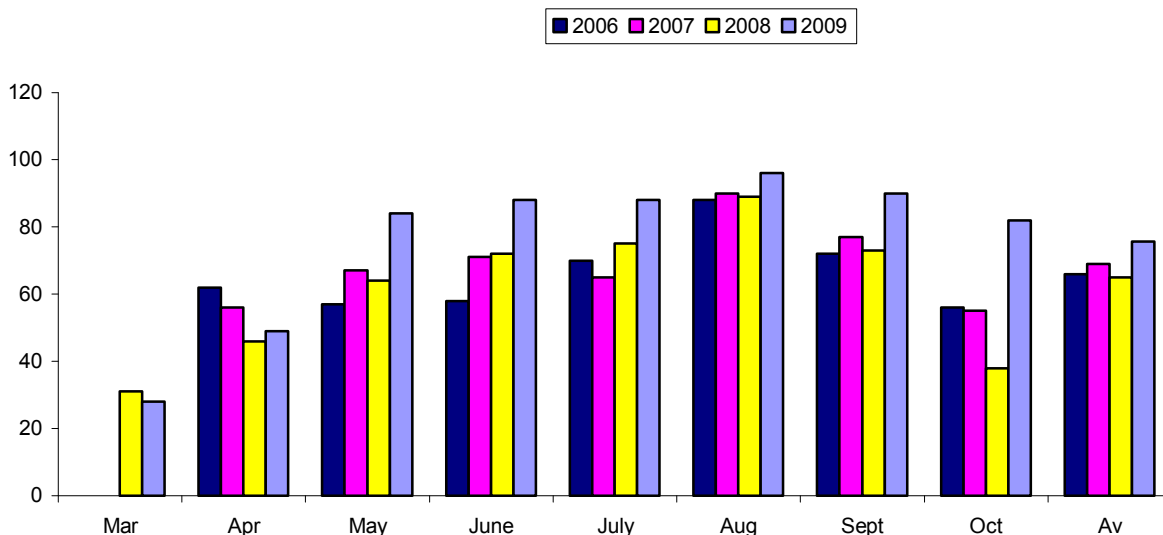
Self Catering Occupancy (%)



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.

Self-catering occupancy results have been mixed in 2009. Increases were recorded in March and September but the other months - including July and August - have shown reductions in occupancy rates. The year-end figure is therefore likely to be down. While changes in sample composition may have played a part, the results from this sector have been less positive.

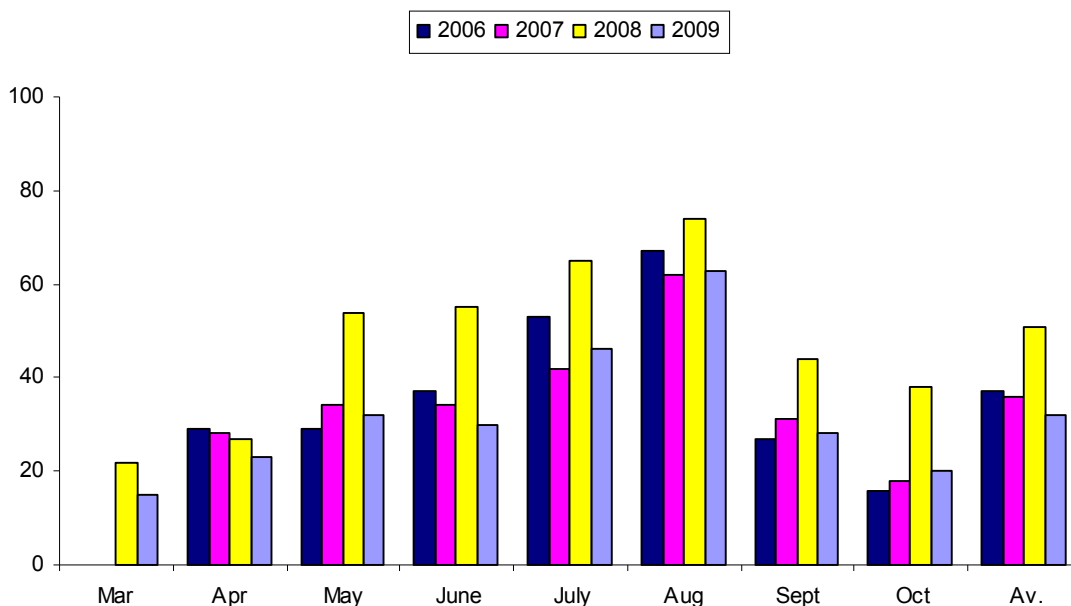
Caravan/Chalet/Holiday Home Occupancy



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

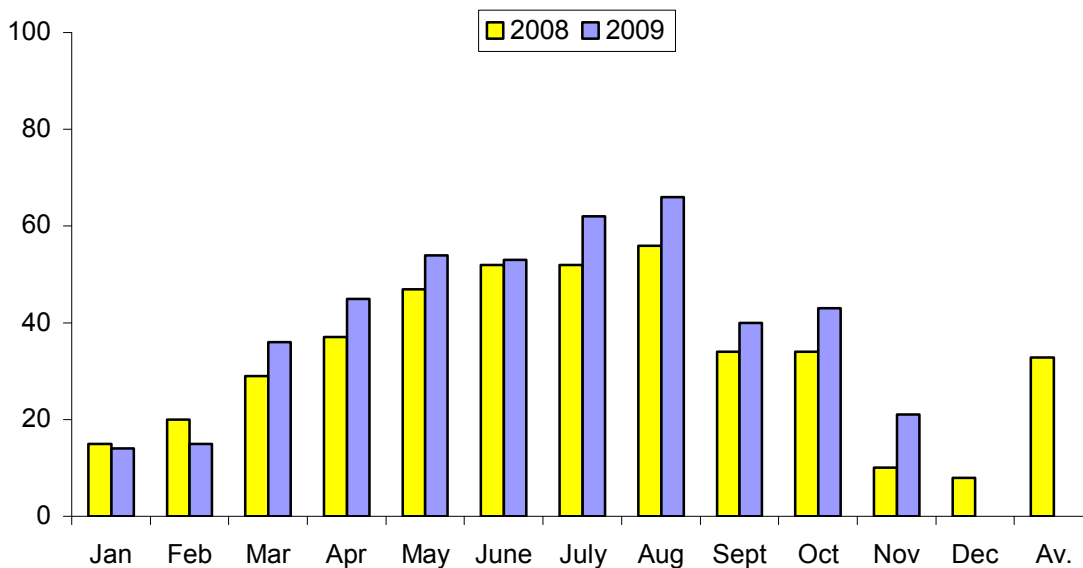
Performance in this sector has been positive in 2009 with increases over 2008 in each month other than March.

Touring Park Occupancy



Touring Park is measured as the pitch occupancy. The increased occupancy rates reported in 2008 are largely attributable to changes in sample in this part of the survey. The 2009 figures do however show evidence of a small decrease in occupancy rates in comparison with 2007. Nevertheless, the peak third quarter months taken together showed similar occupancy levels to 2007.

Hostels



Apart from the off-peak months of January and February, each month has shown an increase in occupancy rates in 2009 compared with 2008, with substantial increases (10%) in both July August and November.

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 January 2010 report.

Visitor Numbers

The Welsh tourism industry has experienced a steady start to the year, with one in five (20%) accommodation operators increasing their guest numbers for the period and just over two in five (44%) achieving the same level.

Of those experiencing a decrease in visitor numbers, 45% give the economic climate as a key reason, and more than 36% state weather issues.

Advance Bookings for 2010

Advance bookings are down for 2010. A minority (13%) of accommodation operators say their advance bookings are looking 'better than normal' for this time of year, compared to one in three (34%) who say that bookings are 'not as good as normal'. Half (50%) say that bookings are the same as normal. Many operators have commented that advance bookings are down because of the continuing trend to book last minute.

Investment

More than half (55%) of businesses are investing in their business by maintaining rooms or facilities to their existing standard. A further one in five (19%) are upgrading rooms or facilities to a higher standard.

The economic climate has not made many operators wary of investing. About one in three (29%) say they are 'confident' about investing and two in five (41%) say their confidence in investing is 'no different to any other time'.

Challenges facing businesses

There are various challenges facing businesses in 2010, the main one being the weather. After three wet summers in a row, operators don't want to contemplate surviving another one.

Last year the industry was helped through the recession by British people not going abroad. This year there is a degree of reliance on the domestic market to hold up the industry again.

Confidence for Spring/Easter

Just over one in five (22%) operators are 'very confident' for the spring/Easter season and more than half (56%) 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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<http://new.wales.gov.uk/topics/tourism/research/?lang=en>