



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 14 October 2009.

## STAYING VISITORS FROM THE UK (Source: UKTS 2008, 2009 January – June, provisional figures)

### UK overnight domestic tourism to Wales: January - June

	<i>millions</i>								
	Trips			Nights			Spend (£)		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Wales	3.90	3.72	-4.52	12.52	12.54	0.13%	£634	£557	-12.15%
England	45.50	46.16	1.43	135.81	133.54	-1.67%	£7,828	£7,741	-1.11%
UK	55.59	56.05	0.82	169.75	166.38	-1.98%	£9,907	£9,731	-1.78%
Wales share of UK total	7.01%	6.64%		7.37%	7.53%		6.40%	5.72%	

### Monthly 2009 data compared to 2008

	Month	<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
UK	Jan	-7.4	-8.0	-15.0	-7.4	-8.0	-15.0	-0.7	-0.9	-2.7
	Feb	-17.1	-15.0	-7.7	-12.9	-12.0	-10.9	-2.3	-1.6	-1.5
	Mar	-14.6	-19.0	-19.6	-13.6	-15.3	-14.5	-2.4	-1.0	-2.4
	Apr	34.6	39.3	17.8	-1.1	-1.4	-5.0	2.7	3.8	1.8
	May	7.1	6.0	1.9	1.1	1.0	-3.1	1.1	-0.4	-0.9
	June	0.2	-4.2	3.3	0.8	-2.0	-1.8	-0.4	-0.4	0.2

While the above tables paint a slightly negative picture of performance in the first six months 2009, the rolling 12 month figures for Wales at end June 2009 were level in terms of trips and 0.3% up in terms of expenditure, compared with the 12 month period ending in June 2008. Also, because the peak third quarter of the year is so significant in overall volume terms for tourism in Wales, it would be wrong to draw conclusions on likely performance for the year based on figures for the first six months.

**INTERNATIONAL VISITORS**  
(Source: IPS 2009, January – August, provisional figures)

**Wales**

- The number of overseas residents visiting Wales during the first half of 2009 is down 24% compared with 2008. The significance of the European markets (including Ireland) can clearly be seen.

Number of overnight visits to Wales by area of residence

	(000)								
	2006	2007	2008	2008				2009	
				q1	q2	q3	q4	q1	q2
North America	168	134	106	14	41	36	15	11	31
Europe	823	689	808	174	217	289	127	129	160
Other Countries	145	164	151	18	52	54	27	22	37
<b>Total</b>	<b>1,136</b>	<b>987</b>	<b>1,065</b>	<b>206</b>	<b>310</b>	<b>379</b>	<b>169</b>	<b>162</b>	<b>228</b>

**UK**

- The number of overseas residents visiting the UK in August 2009 was down 8% compared with August 2008.
- Spending in August this year was 8% higher than the same month last year in nominal terms.

The year-to-date picture is that 9% fewer overseas visitors came to the UK in the first eight months of 2009 compared to the same period of 2008. Total spending over this period is 1% lower than last year in nominal terms.

	<b>August</b>		<b>Year to date</b>		<b>12 months to August</b>	
	Visits (000)	% change 09/08	Visits (000)	% change 09/08	Visits (000)	% change 09/08
North America	460	22	2,490	-13	3,450	-18
EU15	1,730	-9	12,040	-5	17,700	-6
A12	240	-36	1,770	-25	2,710	-22
Rest of Europe	160	-30	1,150	-18	1,790	-16
Rest of World	570	7	2,890	-7	4,200	-9
<b>Total Visits</b>	<b>3,160</b>	<b>-8</b>	<b>20,380</b>	<b>-9</b>	<b>29,890</b>	<b>-10</b>
	Spend (£m)	% change 09/08	Spend (£m)	% change 09/08	Spend (£m)	% change 09/08
<b>Total Spend</b>	<b>2,050</b>	<b>8</b>	<b>10,930</b>	<b>-1</b>	<b>16,205</b>	<b>-2</b>

## 2009 Visitor figures to National Museums

During January to August 2009 the National Museums received 1,222,777 visitors, up 7% on the equivalent period in 2008.

The National Waterfront Museum year to date visitor figures are 25% up on 2008.

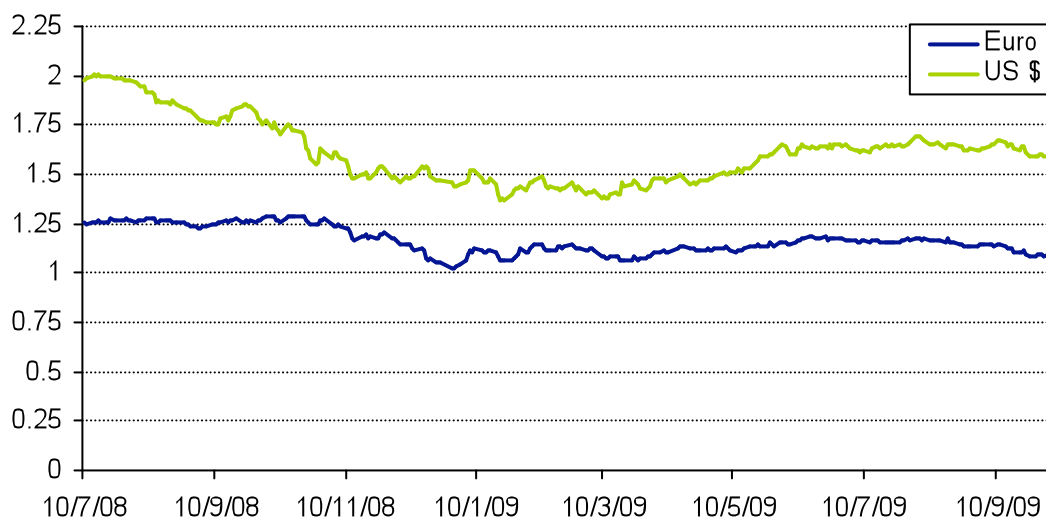
	2009	2008	% change
Cardiff	259,059	243,007	+7
St Fagan's	483,171	470,049	+3
Roman	47,608	47,598	0
Wool	18,846	17,105	+10
Slate	103,639	94,935	+9
Big Pit	125,446	124,468	+1
Waterfront	185,008	147,665	+25
<b>TOTAL</b>	<b>1,222,777</b>	<b>1,144,827</b>	<b>+7</b>

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

## Economic Context

- The Bank rate has remained unchanged at 0.5% since early March 2009.
- Despite a slight rally over the summer months the pound has fallen against both the euro and the dollar over recent weeks.

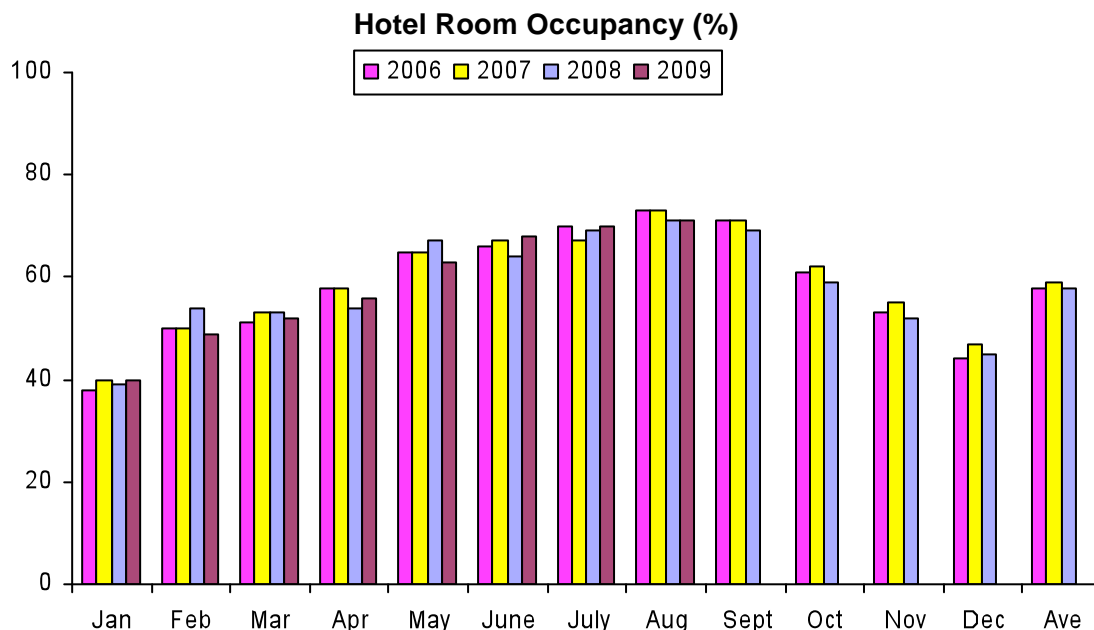
Sterling Exchange Rate: July 08 - October 09  
(Correct at 9 Oct 2009)



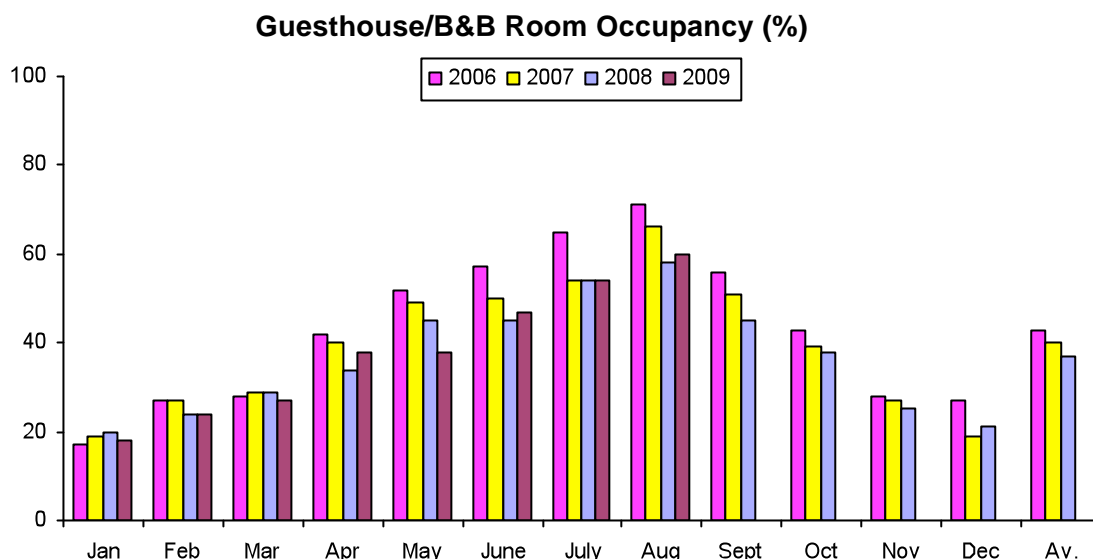
## OCCUPANCY

(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:-

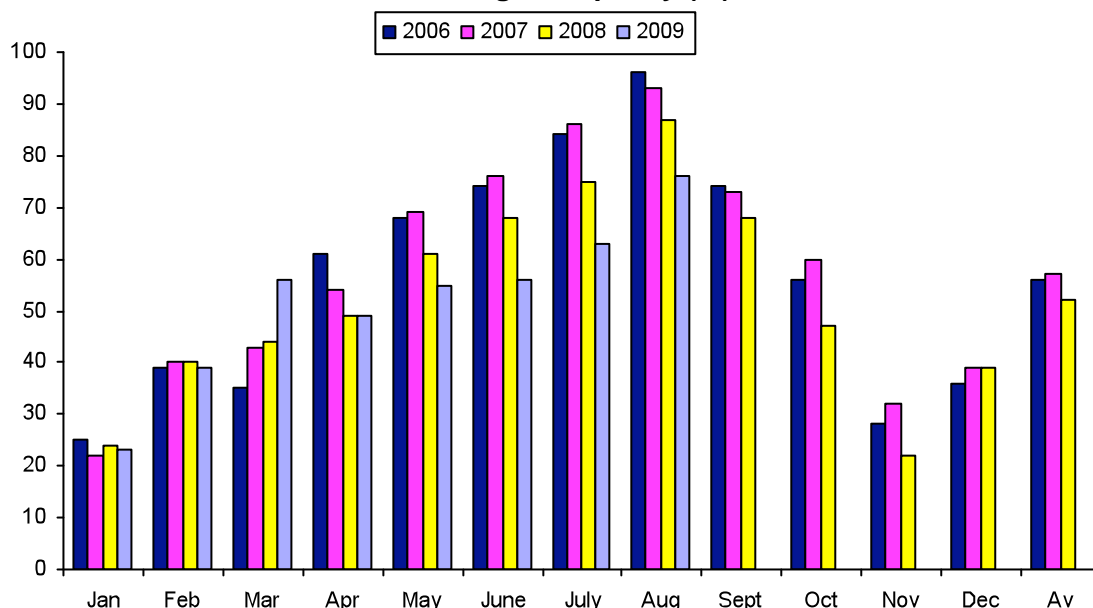


A promising start for hotels with a rise in occupancy during January (+2% and +4% for room and bed occupancy). However, a more challenging February & March with an overall Q1 occupancy level down -3% for room occupancy and -5% for bed occupancy. Easter falling in April accounted for that monthly increase. There was a modest upturn in room occupancy in both June and July.



GH & BB recorded a fall in room occupancy for the first three months of 2009. The occurrence of Easter in April is likely to account for the increase observed in that month. As in the Hotel sector, a slight rise in room occupancy in the guesthouse/B7B sector was also observed in June and August, and similar volumes to 2008 during July.

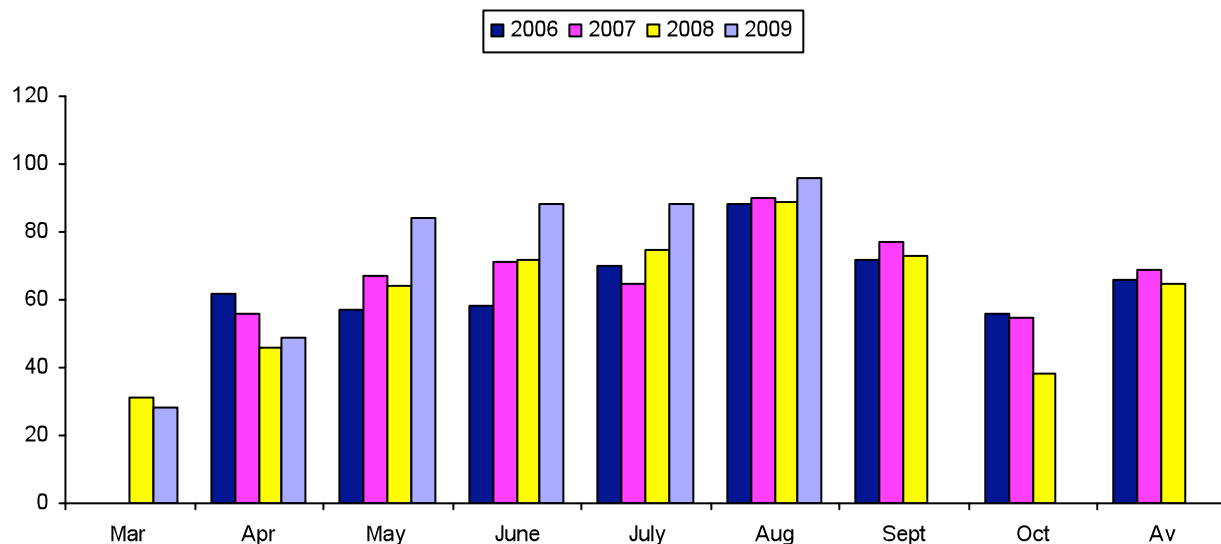
### Self Catering Occupancy (%)



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.

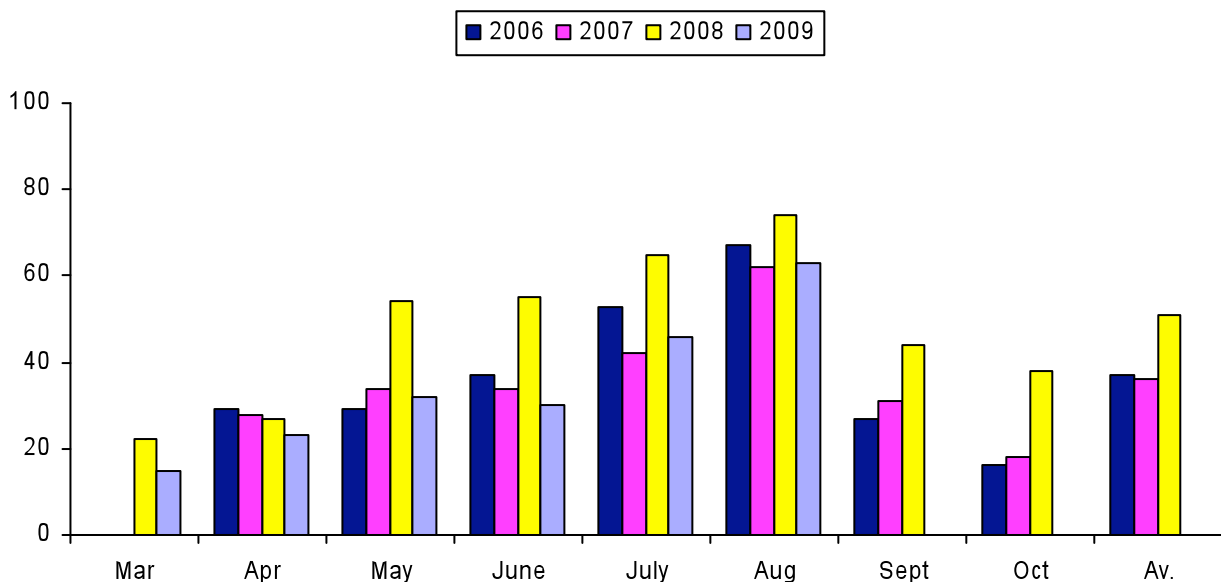
Self-catering establishments started Q1 with variations of between -3% and +3% in January and February occupancy levels. March recorded the greatest change with occupancy rates +44% up on the equivalent time period in 2008. During the second quarter occupancy levels has decrease in comparison to previous years. The presence of Easter in April did not result in the expected upturn as observed in other sectors. Figures for June, July and August 2009 are down in comparison to 2008.

### Caravan/Chalet/Holiday Home Occupancy



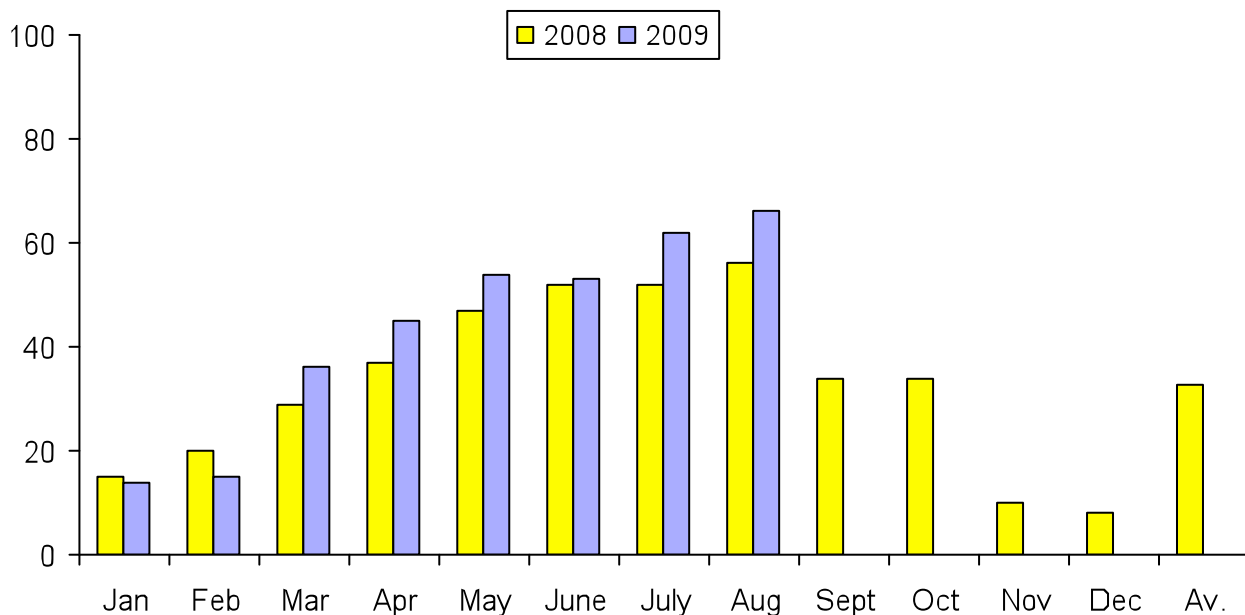
Note: Caravan/Chalet Holiday Home occupancy is measured as the percentage of available caravans and/or chalets occupied.

### Touring Park Occupancy



Touring Park is measured as the pitch occupancy. The increased occupancy rates reported in 2008 are largely attributable to improvements in sample in this part of the survey.

### Hostels



Although January and February were marginally down, from March 2009, there have been increases in the occupancy rates in comparison with the corresponding months in 2008.

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 200 business 5 times a year, following Bank Holidays and other holiday periods. Below are some findings from the September 2009 report that covers the summer period.

### **Guest/Visitor Numbers**

The Welsh tourism industry has enjoyed a successful summer period. About two in five (39%) businesses have increased their guest/visitor numbers for the period and a further two in five (42%) have achieved the same level. Only one in five (19%) report a decrease.

### **Visitor Spending**

Some (42%) operators have noticed no change in visitor spending. However about a third (36%) say that visitors are spending slightly less. The general consensus is that people are cutting their spending on food and drink. In some cases this isn't necessarily affecting tourism businesses, but operators have commented on how restaurants are struggling.

### **Last Minute Bookings**

The trend to book at the last minute has continued this summer. One in three businesses (34%) had more last minute bookings, compared to a minority (15%) who have had fewer.

### **Origin of Visitors**

The increase in visitor numbers this summer has mostly come from UK visitors outside of Wales. About three in ten (29%) businesses have had more of this visitor type, compared to a minority (14%) who have had fewer.

### **Confidence for the Autumn**

About two in three (68%) businesses are confident for the autumn season. This is quite low for this time of year because advance bookings are down.

**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:**

[tourismresearch@wales.gsi.gov.uk](mailto:tourismresearch@wales.gsi.gov.uk)

Tel: 029 2047 5358 / 029 2047 5288

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