



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 3 September 2009.

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

UK overnight domestic tourism to Wales January - May

	Trips			Nights			Spend (£)		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
England	36.7	37.2	1.4	105.7	106.1	0.4	6,143	5,972	-2.8
Wales	3.1	2.9	-4.6	9.6	9.5	-0.6	497	417	-16.1
UK	44.8	45.3	1.1	130.8	132.1	1.0	7,751	7,512	-3.08
Wales share of UK total	6.8%	6.4%		7.3%	7.2%		6.4%	5.6%	

Monthly 2009 data compared to 2008

	Month	% Change								
		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
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

While the above tables paint a slightly negative picture of performance in the first five months 2009, the rolling 12 month figures for Wales at end May 2009 were 0.7% up in terms of trips and 0.2% up in terms of expenditure, compared with the 12 month period ending in May 2008.

Also, the first five months of the year in general accounts for only roughly a third of the total volume for the year in Wales and so it would be wrong to draw conclusions on likely performance for the year based on these figures alone. Performance in the peak third quarter is likely to be the most decisive factor in this respect.

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

Wales

- The number of overseas residents visiting Wales during the first quarter of 2009 is down 21% 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

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

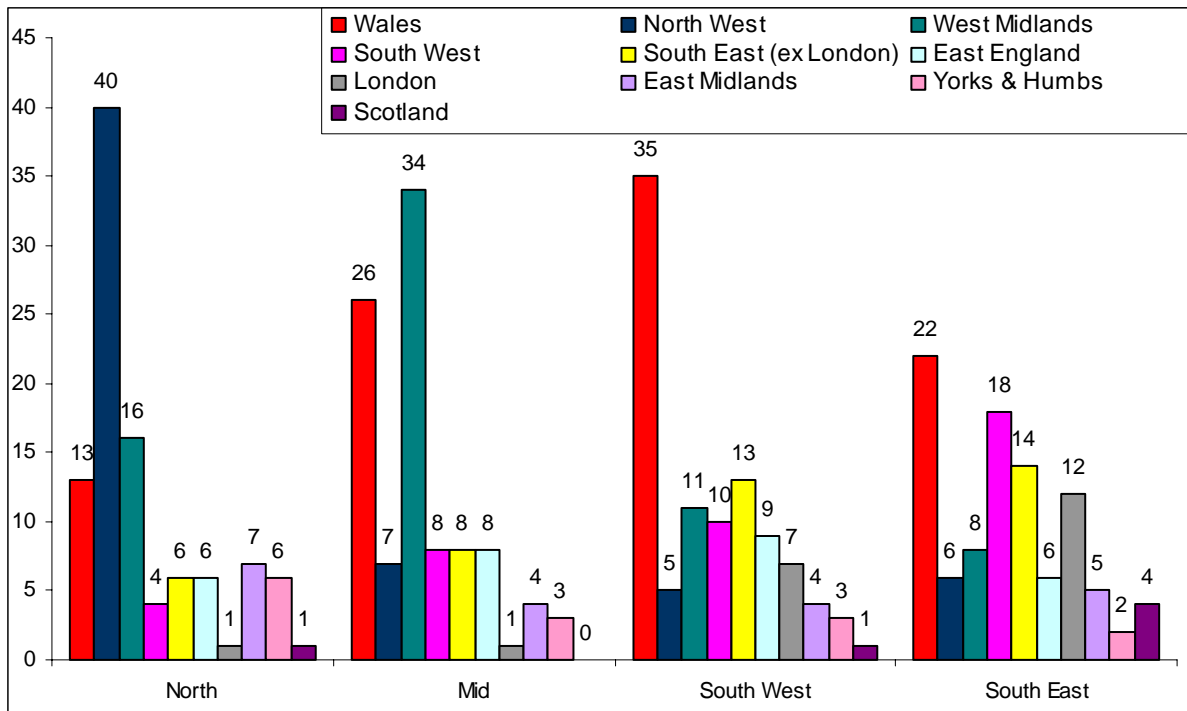
UK

- The number of overseas residents visiting the UK in May 2009 was down 14% compared with May 2008.
- Spending in May this year was 11% lower than the same month last year.
- The year-to-date picture is that 12% fewer overseas visitors came to the UK in the first five months of 2009 compared to the same period of 2008. Total spending over this period is 3% lower than last year in nominal terms.

	May		Year to date		12 months to May	
	Visits (000)	% change 09/08	Visits (000)	% change 09/08	Visits (000)	% change 09/08
North America	320	-20	1,230	-19	3,520	-20
EU15	1,620	-9	7,140	-5	17,920	-4
A12	190	-42	1,020	-31	2,860	-14
Rest of Europe	150	-18	707	-16	1,910	-7
Rest of World	330	-5	1,340	-15	4,180	-10
Total Visits	2,610	-14	11,440	-12	30,390	-8
	Spend (£m)	% change 09/08	Spend (£m)	% change 09/08	Spend (£m)	% change 09/08
Total Spend	1,290	-11	5,720	-3	16,135	-1

Spotlight on the origin of Visitors to Wales in 2008

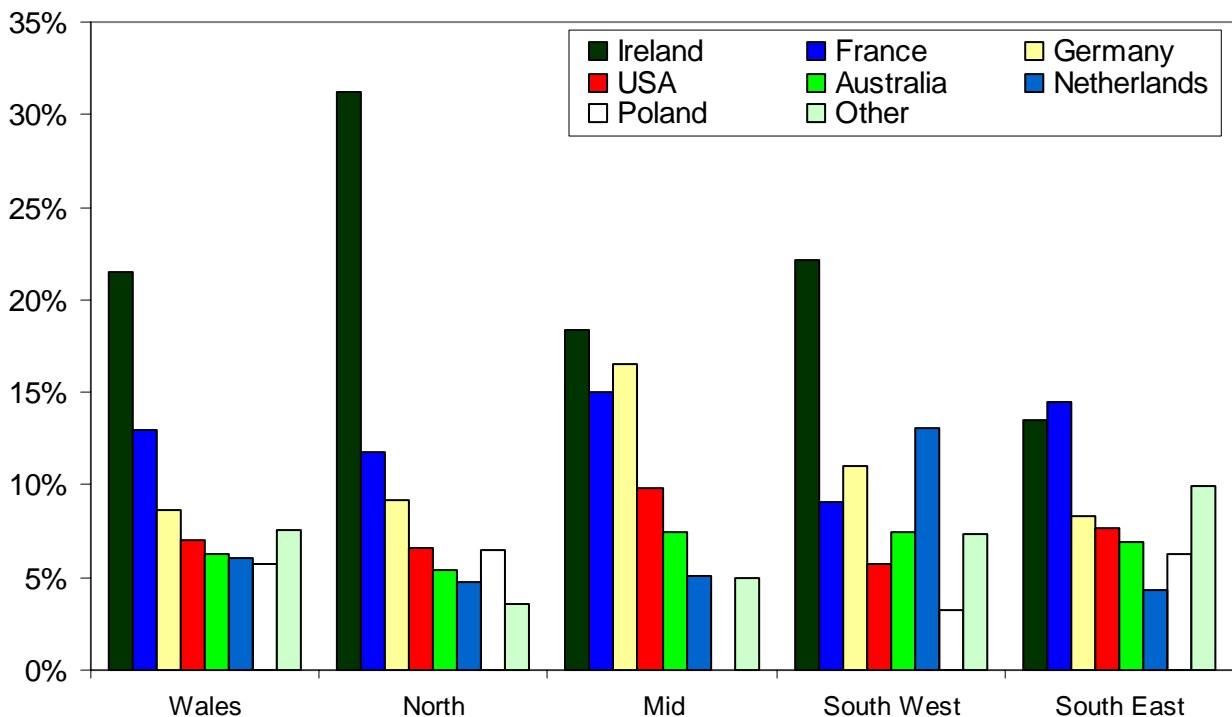
Origin of overnight UK domestic visitors to the Welsh regions (% share of trips)



Proximity and ease of access to the destination is a significant factor when considering the region of residence of UK 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.

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.

Origin of International visitors to the Welsh regions (% share of trips)



2009 Visitor figures to National Museums

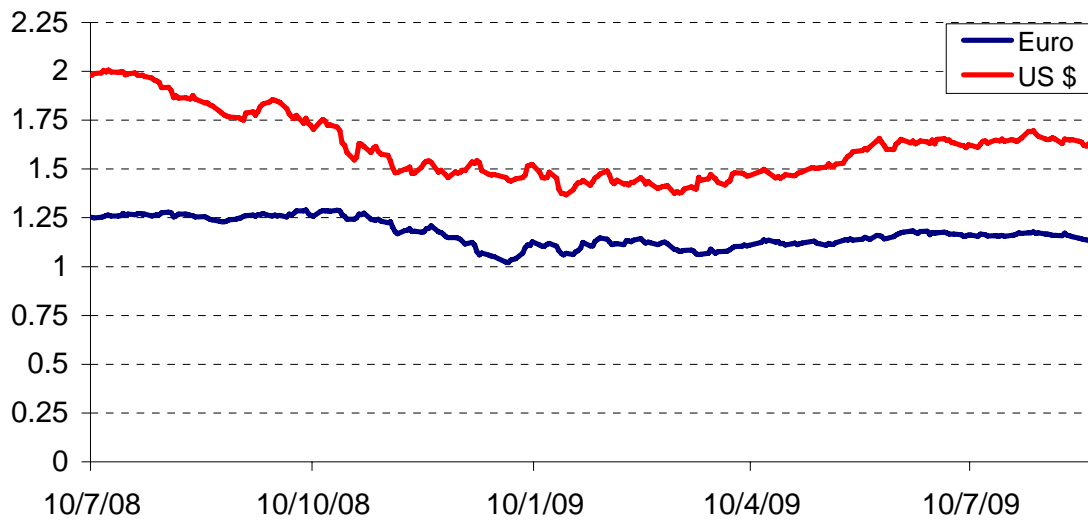
During January to May 2009 the National Museums received 646,153 visitors, up 6% on the equivalent period in 2008.

However both Big Pit and the National Slate Museum experienced a fall in their year to date visitor numbers (down -1% and -5% respectively).

Economic Context

- The Bank rate has remained unchanged at 0.5% since early March 2009.
- The Pound has recovered slightly against both the Dollar and the Euro over the past few months.

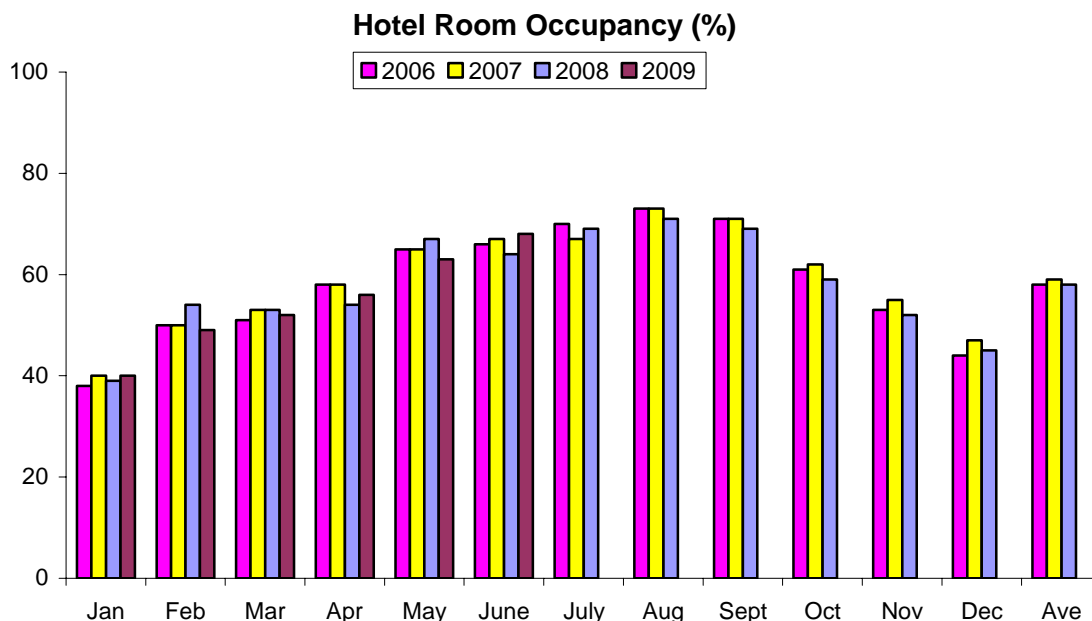
Sterling Exchange Rate: July 08 - August 09
(Correct at 1 Sept 2009)



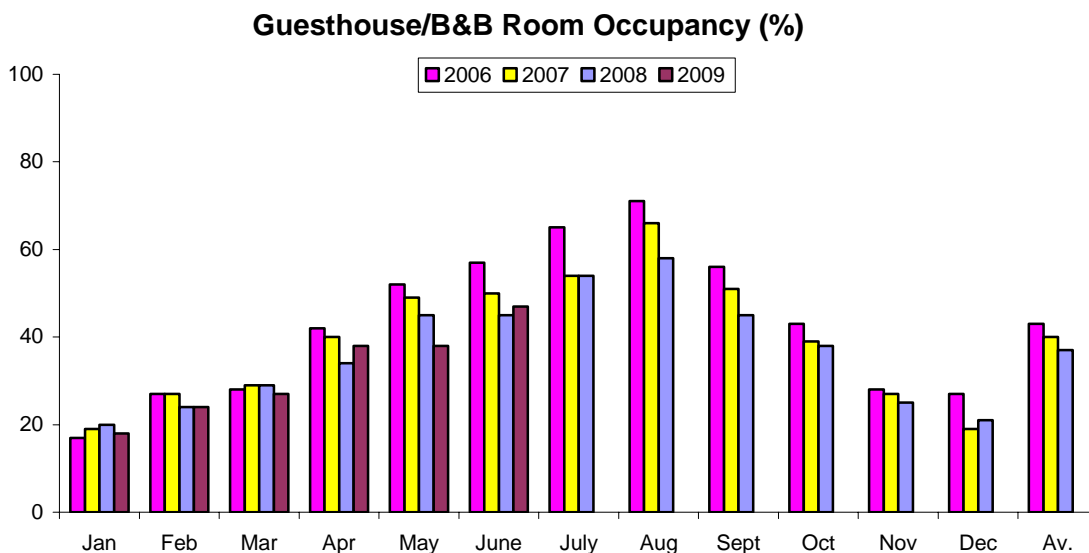
OCCUPANCY

(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:-

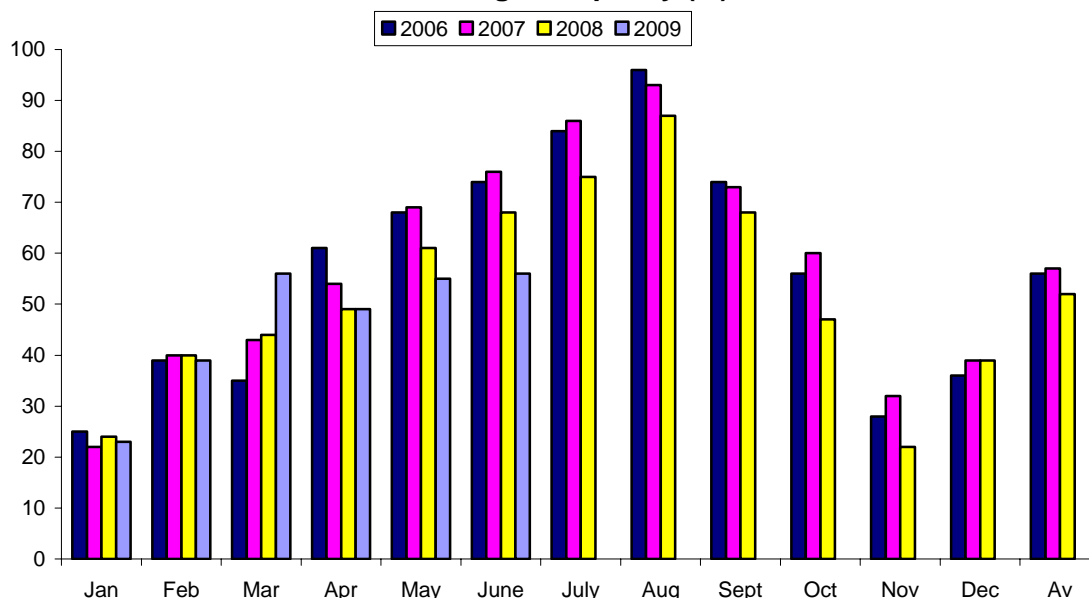


A promising start for hotels with a rise in occupancy during January (+2% and +4% for room and bed occupancy). However, a more challenging February & March with an overall Q1 occupancy level down -3% for room occupancy and -5% for bed occupancy. Easter falling in April accounted for that monthly increase.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



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.

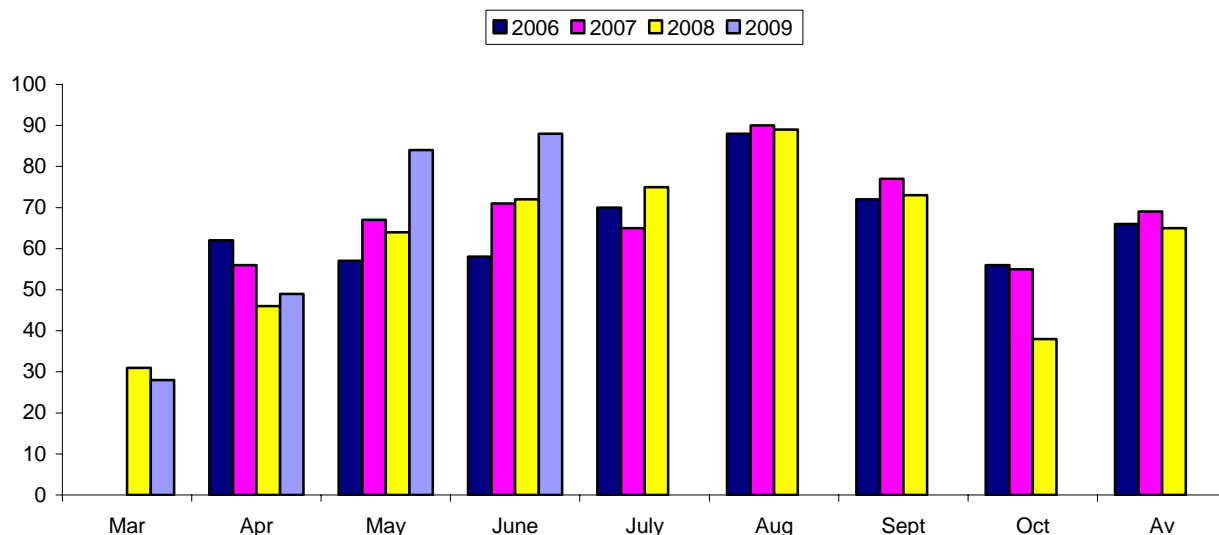
Self Catering Occupancy (%)



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.

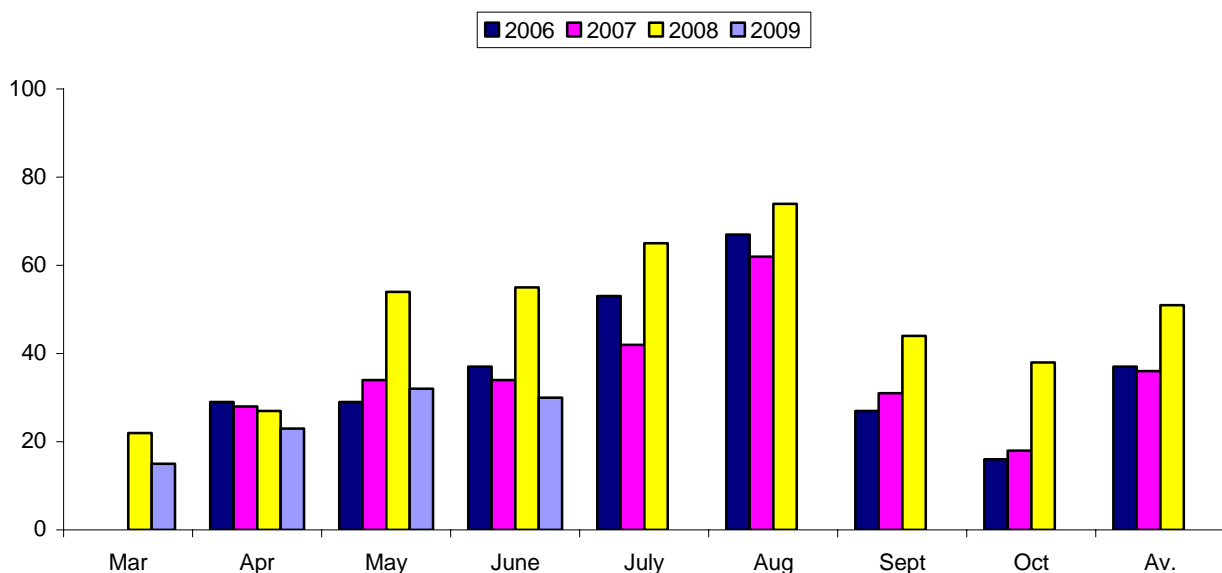
Self-catering establishments started Q1 with variations of between -3% and +3% in January and February occupancy levels. March recorded the greatest change with occupancy rates +44% up on the equivalent time period in 2008. During the second quarter occupancy levels has decrease in comparison to previous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

Caravan/Chalet/Holiday Home Occupancy



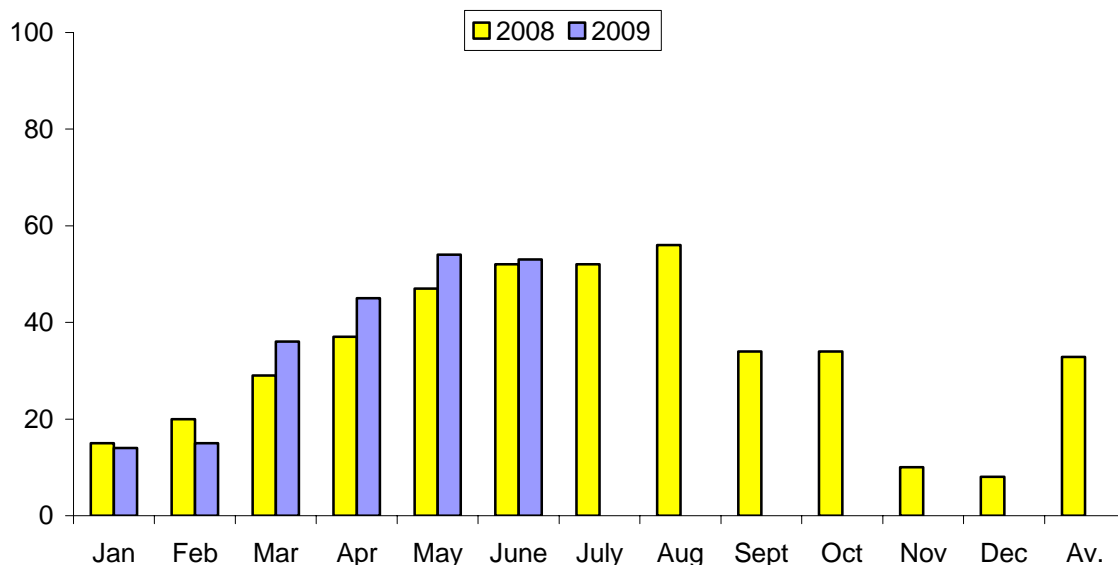
Note: Caravan/Chalet Holiday Home occupancy is measured as the percentage of available caravans and/or chalets occupied.

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



Hostels observed a decrease during the first two months of the year. There was however a good recovery during March to June.

All 2009 monthly summaries reports on each sector are available at:

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

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>