



This research update aims to provide an early picture of tourism performance by drawing upon Visit Wales' own research and information from other relevant sources. It is based upon information available at 31 October 2008.

STAYING VISITORS FROM THE UK (Source: UKTS)

All figures in this section refer to the first seven months of 2008 (January-July)

Trips (millions)

		Change from same period in 2007
Wales	5.00	+ 4.41%
UK	67.63	+ 0.68%

Wales' 'market share' of all staying trips in UK by UK residents: 7.39% (7.03% in corresponding period in 2007)

Expenditure (£millions)

		Change from same period in 2007
Wales	830	+ 8.64%
UK	12328	+4.97%

Wales' 'market share' of all expenditure on staying trips in UK by UK residents: 6.73% (6.51% in corresponding period in 2007)

INTERNATIONAL VISITORS (Source: IPS)

All figures in this section refer to the first six months of 2008 (January-June)

Trips (millions)

		Change from same period in 2007
Wales	0.522	+40.70%
UK	15.617	+2.42%

Wales' 'market share' of all trips to UK by international visitors: 3.34% (2.43% in corresponding period in 2007)

Expenditure (£millions)

		Change from same period in 2007
Wales	£ 137	+0.74 %
UK	£7332	+7.78 %

Wales' 'market share' of all expenditure in UK by international visitors: 1.87% (2.00% in corresponding period in 2007).

OCCUPANCY

(Source: Visit Wales Occupancy Survey)

All figures refer to the first eight months of 2008 (January-August) except where stated.

- Serviced Accommodation

Hotel Room Occupancy:

Average Monthly rate 59% (59% in corresponding period in 2007)

Hotel Bedspace Occupancy:

Average Monthly rate 43% (45% in corresponding period in 2007)

Guest House/B&B Room Occupancy:

Average Monthly rate 39% (42% in corresponding period in 2007)

Guest House/B&B Bedspace Occupancy:

Average Monthly rate 31% (34% in corresponding period in 2007)

- Self-Catering Accommodation

Cottages, Houses, Flats, (Includes Agencies and Independents)

Average Monthly rate: 56% (60% in corresponding period in 2007)

Hostels

Average Monthly rate:39% (2008 is first year of inclusion in survey)

Touring Parks (Apr-Aug)

Average Monthly rate:55% (40% in corresponding period in 2007)

Note: The improved rate is probably attributable to the improvements in the sample.

Caravan Holiday Parks (Apr-Aug)

Average Monthly rate:69% (70% in corresponding period in 2007)

All 2008 monthly summaries reports in each sector are available at:

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

TOURIST INFORMATION CENTRES - Wales Network

All figures in this section refer to the first six months of 2008 (January-June)

		Change from same period in 2007
All Visits	1,162, 473	- 6.9%
Overseas Visits	156,235	-10.7%

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. Wave 4 of the survey, which followed the August Bank Holiday in 2008, yielded the following results:

- **Guest/Visitor Numbers**

The tourism industry in Wales has endured a difficult summer period hit by persistent bad weather and, to a lesser extent, the credit crunch. One in four (23%) businesses has managed to increase their guest/visitor numbers for the period and one third (32%) have achieved the same level. However, more than two in five (43%) businesses have had a decrease. Many indoor attractions have benefited from people seeking things to do indoors in the bad weather.

- **Turnover**

One in five (20%) businesses have increased their turnover for the period and three in ten (29%) have achieved the same level. More than two in five (43%) have had a decrease.

- **Impact of Credit Crunch**

Opinion is divided on the impact of the credit crunch. One in five (20%) businesses believe it has had a significant impact on their business this year and a further one fifth (20%) say it has had a partial impact. However half (50%) believe it has had little or no impact on them and one in ten (10%) don't know.

- **Confidence for the Autumn Season**

Confidence is low for this time of year. Only half (52%) are confident about the autumn season. This compares to 78% this time last year.

A copy of the 'Tourism Business Survey - Wave 4 August 2008' report is available at: <http://new.wales.gov.uk/topics/tourism/research/tourisminwales/businesssurvey/2643043/?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>