Latest Visit Wales Research

Visit Wales fortnightly Tourism Consumer Tracker

Visit Wales are working with VisitBritain and VisitScotland to extend the current BVA BDRC survey to focus on demand for holidays in the short-medium term.

Reports are published fortnightly on the VisitBritain website. Wales-focused reports are published every 4 waves on the Welsh Government website, and include data on Wales residents and UK residents intending to visit Wales.

UK Fortnightly Findings (Wave 17: 12 – 16 October):

- The average mood of U.K. residents has fallen marginally since Wave 16, from 6.6 to 6.5 driven by a slight fall in those rating their mood as 9-10 out of 10, the lowest average seen so far and level with Wave 15.
- 15% of U.K. adults claim to have been on a U.K. overnight trip since September; three times as high as the proportion that took an overseas trip in this period. With 2 weeks of October still left, it's likely that actual trip activity will closely align with the 20% intent (asked during August).
- The South West of England is attracting the highest proportion of autumn trip-takers at 17%, although this is down on the 22% share it received among trip intenders when they were asked in August.
- Scotland, Wales and Yorkshire are also currently set to receive fewer trips than intent suggested.

Wales Monthly Analysis (Waves 9-13: 31 August – 2 October):

- 20% of the U.K. population (10.8 million adults) and 15% of Welsh residents anticipate taking a domestic short break or holiday by the end of the year (with 2 trips planned on average). Intention to take a trip has dropped significantly amongst Wales residents, 26% planned on taking a trip in early September, but this fell to 15% as of early October.
- 27% of U.K. adults plan on taking an overnight trip between October and March, of whom 8% plan on visiting Wales. Notably, the proportion that plan to visit Wales has dropped since early September, along with other areas with increased restrictions such as the North East England.
- As of early October, 30% of U.K. adults (c.16.2 million) had taken an overnight short break or holiday in the U.K since restrictions were lifted in early July, compared to 24% of Wales adults. Both significantly higher than intended trips before restrictions were lifted.
- 14% of U.K. residents and 12% of Wales residents anticipate taking a day-trip in the October half-term, rising to 22% amongst Wales-based families, and dropping to 6% for Wales-based older independents and 4% for Wales-based retirees.
- 12% of U.K. adults in employment intend to take an overnight business trip by March 2021, compared to 7% of working adults living in Wales. Meetings of 1 to 5 people are the main reason for U.K. residents taking a business trip, larger meetings the next most prevalent reason.

Visit Wales Tourism Business Barometer Wave 5 Report (16-29 September 2020)

- Most (87%) businesses are now open again.
- 29% of open businesses have had more customers since reopening than they would normally have during that period, and 31% have had fewer.
- The self-catering, caravan & camping sectors have performed well and activity providers remain the hardest hit (75% having had fewer customers than normal).
- About two in five (39%) of those open are operating at full capacity. Business performance correlates strongly with open capacity.
- There are regional differences with south east Wales businesses faring the worst.
- One in six (17%) businesses had more bookings than normal for October/November, 40% had the same level, but 43% had fewer. Bookings for businesses interviewed after local lockdowns reduced whether they were in a lockdown area or not.
- 4% of businesses have made redundancies. Among the sample of 801 businesses, 44 FT staff have been made redundant to date, and 21 PT staff.
- The median loss per business from the crisis lies towards the top end of £10,000 to £25,000, 41-50% of normal revenue for the whole year.
- Most (73%) businesses expect to survive longer than the next six months. 5% of operators say they don't expect to survive the next six months, and the remaining 22% answered 'it depends' or 'don't know'.

**This summary document was last updated on 28.10.2020*

Cymru Wales

Latest Consumer Research

Welsh Government Survey of public views on the coronavirus 9 October 2020

- Perceptions of the threats posed by coronavirus have been relatively stable for some time. It continues to be seen to pose a greater threat to the country than to individuals.
- The proportion of people only leaving home for essential journeys has increased recently and a large majority in Wales continue to try to keep two metres away from others when out.
- The Welsh public continue to think the coronavirus pandemic will have a personal financial impact on them. Around a quarter are concerned they will not be able to pay their bills one month from now.

Experimental statistics relating to passenger arrivals to the UK since the COVID-19 outbreak, 27 August 2020

- Experimental statistics on passenger arrivals throughout 2020 show July air passenger arrivals around one tenth last year's level.

Office for National Statistics Diary of a nation: Life in Lockdown 23 September 2020

- Summarizing qualitative findings from public surveys on opinions and behaviours during the first 6 months of lockdown.

Daily Visitors to DCMS Sponsored Museums and Galleries 23 October 2020

- Experimental statistics showing the number of daily visits to DCMS sponsored museums and galleries based on nine DCMS-sponsored museums and galleries which were open or partially open to visitors and able to supply data.
- 5-11 October 2020, visits were at 17.1% of the daily average in October over the three previous years. For the period 12-19 October 2020, this was 17.4%.

Department for Transport National Travel Attitudes Study: Wave 4 (provisional) 8 October 2020

- The coronavirus (COVID-19) pandemic had a substantial and potentially sustainable impact on active travel. When interviewed between May and July 2020, 39% reported to walk more and 38% reported to cycle more than before the outbreak of the coronavirus.
- In Wave 4, 86% expressed concerns for their health when thinking about using public modes of transport

HMRC coronavirus (COVID-19) statistics 22 October 2020

- HMRC data covering the Coronavirus Job Retention Scheme, the Self-Employment Income Support Scheme, the Eat Out to Help Out scheme, and the VAT payments deferral scheme.

Taking Part Web Panel Data: Engagement during the COVID-19 pandemic 16 September 2020

- Estimates of cultural, digital and sporting engagement – both online and offline - during the COVID-19 pandemic using English panel data (NB not fully representative sample) fieldwork took place May – July.

DCMS announces new pilots for return of spectators to elite sport 26 August 2020

- Events will support ambition to allow fans to return to live sport from 1 October with social distancing.

**This summary document was last updated on 28.10.2020*

Cymru Wales

Latest Consumer Research continued

VisitBritain revised forecasts for volume and value of inbound and domestic tourism to the UK in light of the impact of COVID-19 – updated 12 October 2020

- Revised forecasts based on 'central scenario' which assumes that a vaccine will not be widely available in 2020, that the UK will not go into a full lockdown, but that there may be local lockdowns.

Domestic GB forecast 2020:
£46.8bn in spending (down 49% on 2019)

- £12.6bn in overnight tourism (down from £24.7bn in 2019)
- £34.2bn in day trips (down from £67.0bn in 2019)

Some categories of day trip recovered earlier, others are still limited and continue to be so.

- This estimates a loss of £44.9bn (£12.1bn in lost overnight spending and £32.8bn in lost day trip spending)
- The loss in spending from the domestic visitor economy is almost twice the loss from inbound visitors in absolute terms.

Inbound GB forecast 2020:

- £6.1bn in spending (down 79% on 2019)
- 10.6 million visits (down 74% on 2019)
- This estimates a loss compared with pre-COVID

VisitBritain's original forecast for 2020, released in December 2019, was for inbound visits to the UK to grow by 2.9% and for spending by inbound visitors to grow by 6.6%, setting new records in each case.
Revised forecasts represent a loss vs the pre-COVID forecast of 31.1 million visits and £23.8 billion spending.

UK Sport: Returning to UK sporting events during COVID-19: Analysis of spectator experiences at pilot events

1821 spectators surveyed at basketball, cricket, football, horseracing, rugby and snooker events (26 July – 3 October 2020)

- Overall, the respondents had high trust in the event organisers to maintain their safety, and reported positive experiences of the events
- A recurring theme is that the events were important for mental health and mitigating the negative consequences of social isolation

Recovery and forward trends

STR Tourism Consumer Insights Tourism After Lockdown: Taking the Pulse of Travel – September Traveller panel 12 October 2020

UN World Tourism Organisation:

- Comprehensive tourism recovery tracker 24 September 2020
- Secretary General's policy brief Tourism and COVID-19 – Unprecedented Economic Impacts

Other markets

VisitScotland Feedback from Events supply chain consultation 10 July 2020 – **key findings**

- 315 businesses working closely with the events sector completed an online survey (from 16-22 June).
- **43% say they can continue to trade for 1-6 months, 25% are unsure, 4% have ceased trading**
- 21% have been unable / ineligible to access funding
- **9% have made / anticipate making redundancies (this includes businesses who employ 0 staff)**

Scottish Tourism Alliance responds to research 3 September 2020
Around half of Scotland's hospitality businesses and 90,000 jobs could be at risk if the country entered a second lockdown with one in four businesses likely to fold.

Scottish Tourism Recovery Taskforce published recommendations for sector support through recovery.

Cumbria Tourism business tracker 21 October 2020 shows almost a third of businesses are planning redundancies and Almost half (46%) of tourism businesses are not confident about surviving the next six months.

**This summary document was last updated on 28.10.2020*

Cymru Wales

Economic information resources

The Office for National Statistics (ONS) updates various data resources regularly:

Daily Coronavirus (COVID-19) roundup

- A summary of coronavirus data and analysis produced by the ONS, updated daily, and containing links to each publication or data source

Coronavirus and the economic impacts on the UK

- Based on a new voluntary fortnightly survey, looking at the impact of COVID-19 on businesses

Gross Domestic Product (GDP) Estimates for the UK:

- Monthly estimate for August
- Quarterly estimate for April to June

Coronavirus and the latest indicators for the UK economy and society

- Experimental data using a variety of data sources to produce fast indicators

Coronavirus and the social impacts on Great Britain

- Using the Opinions and Lifestyle Survey to analyse COVID-19 impacts on people, households and communities.

Retail sales

- Retail sales estimates, with quantities bought and the amount spent on various categories and for retail and online.

Consumer price inflation, UK

- Price indices for the different measures of consumer price inflation.
- Impact of Eat Out to Help Out on Consumer Prices: August 2020
- Re-weighted consumer prices basket – adjusting for consumption changes during lockdown: July 2020

Labour market overview

- Estimates of employment, unemployment and economic inactivity

Other resources:

National Institute of Economic and Social Research:

- The Lockdown Weighted inflation CPILW for September 2020 26 October 2020

Resolution Foundation regularly publish reports looking at the impact of coronavirus on the UK economy:

- Job Support Scheme moves jobs cliff edge to January and sets up difficult conversations between firms and workers 24 September 2020
- An Intergenerational audit for the UK 7 October 2020

Princes Trust report Pandemic highlights "aspiration gap" as young people lose hope 29 September 2020

**This summary document was last updated on 28.10.2020*

Cymru Wales