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Tourist Attractions: Current Trends

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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1. Summary of Key Findings

- The number of visits to Welsh and UK attractions grew significantly between 2008 and 2011.

- 2012 saw the first fall in visitor numbers in Wales and UK since 2008 years, in part to extremely poor weather during the summer of 2012.

- The volume and value of visits to Wales during the 2013 main season was well up on 2012 with business confidence high.

- Since 2009, Free to Enter attractions have seen bigger increases than in the paid attractions.

- Changes in visitor volumes at attractions differ across the regions: South West has seen some decline, while the South East's free attractions performed well.

- On average, the Attractions sector has reported more increases in business than the Accommodation sectors over the past 3 years.

- Average admission revenues increased 13.5% in notional terms since 2009.

- Paid attractions have seen increases in secondary revenue streams such as retail, food and car parking.

- The number of unpaid volunteers as a proportion of the attractions workforce, peaked in 2010 at 45%, with the last two years showing some decline.

- Visiting attractions is the top or second highest rated reason to visit Wales, particularly for day visitors and overseas visitors.

- Castles and historic sites are the most common reason for visiting Wales with GB and overseas visitors.

- The 'Staycation' trend has supported the attraction sector.

- Future growth in overseas holidays and wetter summers may challenge attractions, particularly outdoor attractions.

2. Introduction

2.1 The purpose of this report is to provide an overview of trends in the Attraction sector within Wales over recent years. The research draws upon various official and other data sources. These include the Wales Attractions Survey, Great Britain Tourist Survey (GBTS), Great Britain Day Visitor Survey (GBDVS), the Wales Visitor Survey, the Survey of Tourism Businesses as well as Visit Britain and Mintel reports.

2.2 The report has been complied for use by the Attractions sector as well for local and national government to support future planning and operational strategies in the industry.

2.3 The UK visitor attractions market has continued to thrive as a result of a combination of strong domestic tourism and overseas visitor numbers. However, some sectors of the market – particularly those targeting the hard-pressed family sector – have come under pressure in the past 18 months due to the continued squeeze on household incomes with declining real wages.

2.4 Volume and importance of Attractions in Wales

Each year there are around 11 million visits to attractions in Wales

The approximate split between the visitor types is:

GB Overnight staying visitors	44%
GB Day visitors	46%
Overseas Visitors	10%

2.5 The 2001 definition of a tourist attraction agreed by the four National Tourist organisations is included the report of Visits to Tourist Attractions in Wales 2012 :

"An attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education, rather than being primarily a retail outlet or a venue for sporting, theatrical or film performances. It must be open to the public without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc. and must be receiving revenue directly from the visitors."

3. Background

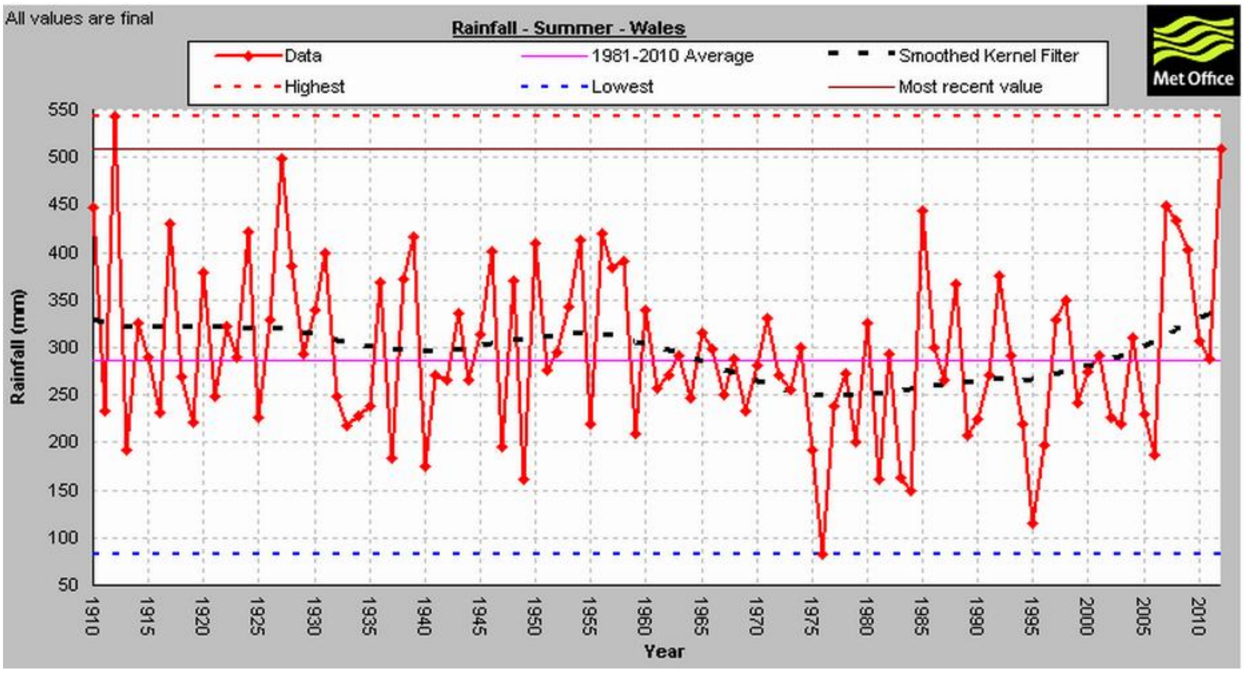
3.1 The UK economy and climate are both key factors that have a major impact on Welsh domestic tourism, including the Attractions sector.

Climatic Background

3.2 According to the Met Office, Figure 1 shows that 2012 was the second wettest year on record with flooding in many parts of the country. In the media the key tourist months were known as the "lost summer" due to low temperatures and high rainfall.

3.3 Looking longer term, evidence suggests the UK may be getting wetter. Four of the wettest years since 1910 in the UK have occurred since 2000, the latest being 2012.

Figure 1 - Annual average Rainfall levels for Wales



Source - Met Office

Economic Background

3.4 The UK economy continued to feel the effects of the financial crises and global economic downturn. Economic output and real wages in the UK are still below their pre-recession peaks.

3.5 Issues that were relevant to 2011 (high fuel prices, increased cost of living in general) remained relevant.

3.6 As in 2011 and 2012, the rise of the Staycation contributed positively to visitor numbers to Welsh and UK-based visitor attractions. However, this positive effect could be tempered with a squeeze in household disposable income.

The UK Context

3.7 The Mintel report on Domestic Tourism – UK, September 2013 sets out the UK tourism market conditions.

3.8 In 2011, the UK had formally come out of recession although there was rising unemployment and increasing oil prices. As in 2010, the media continued to report on the rise of the staycation.

3.9 In 2012, the number of domestic holidays taken fell by 1.2%, hampered by the second wettest year on record in the UK.

3.10 Domestic growth has been uneven: short breaks have done better than longer UK holidays; city tourism has increased, whereas the coast and countryside have seen only slight growth.

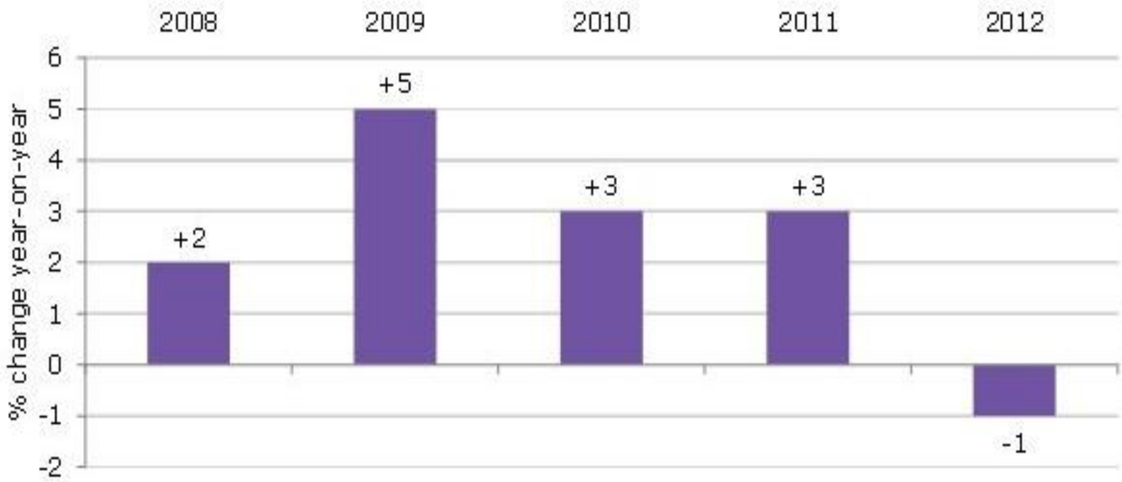
3.11 Sterling remains over 20% lower in value against the euro than before the onset of the financial crisis and global economic downturn in 2007/08, making holidays abroad more expensive for UK residents and holidays in the UK less expensive for overseas visitors, which supports the 'Staycation'.

3.12 The weather's unpredictability through the seasons and a revival of UK economic growth, a stronger Pound may see vacations abroad become more appealing in the future.

The UK Attractions Sector

3.13 Looking more closely at the attractions sector across the UK, Figure 2 below from the Mintel Domestic Tourism Report, Sept. 2013, shows that visitor attractions saw a slight fall in 2012, the first fall in the number of visits recorded since 2005.

Figure 2 - Year-on-year percentage increase in visits to attractions in England, 2008-12



Source - VisitEngland/Mintel Visitor Attractions, UK Oct 2012

3.14 The report highlights that in 2012, free-to-enter sites saw 3% growth in the number of visits, outperforming paid-for attractions which saw a 2% contraction. The report also comments on the staycation trend being of great benefit to the UK visitor attractions industry in the past three or four years. The number of domestic holidays has increased by 12% from 2007-2012, whereas overseas holidays for GB residents fell by 19%.

3.15 The high levels of rainfall in 2012 contributed to a decline in the number of visits in sectors with high numbers of outdoor attractions (e.g. wildlife attractions/zoos and castles) suffered the biggest declines. Only the Museums & Galleries and Workplaces sectors reported slight growth in the number of visits.

3.16 It is also possible that the London Olympics in 2012 affected the market, with many attractions reporting a decrease in footfall during the summer months.

3.17 Adult entry charges to paid attractions increased by 4% in 2012, with child charges increasing by 3%, helping to offset volume declines.

3.18 Seven of the top ten free attractions in the UK reported growth in 2012, whereas only one attraction in the top ten paid-for sites recorded visitor growth. In the longer term, all of the top ten attractions in the UK have experienced growth since 2009, however growth for paid attractions has been more sporadic and modest than for free attractions.

4. Wales Attractions Visitor Volume and Value trends

4.1 Performance figures for Welsh Attractions have been compiled from the Wales Attractions Survey and the Survey of Tourism Businesses, Commissioned by Welsh Government.

Visits

4.2 Table 1 shows that total visits to tourist attractions between 2011 and 2012 decreased by 5.3% (comparing matched samples, 2011-2012) with visits totalling nearly 11.5 million in 2012.

4.3 Looking back to 2006, Table 1 and Figure 3 below show there has been a general upward trend in visitor numbers with year on year increases between 2006-11. Despite the first dip in visitor numbers in 2012, there has been a cumulative increase in visitor numbers of 10.1% since 2006.

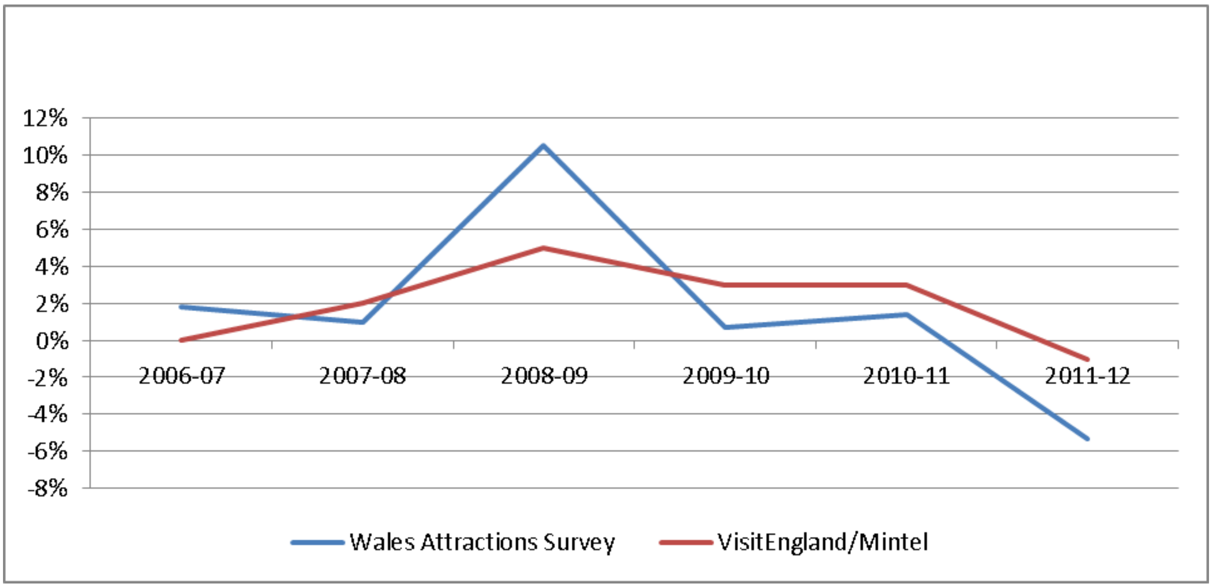
Table 1 - Year on Year change in Welsh attraction visitor numbers 2009-12

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Visitor numbers millions	10.6	10.7	12.7	11.3	11.8	11.5
% change (annual)	1.8%	1.0%	10.5%	0.7%	1.4%	-5.3%
Cumulative change since 2006	1.8%	2.8%	13.3%	14.0%	15.4%	10.1%

Source - Wales Attraction Survey

4.4 Figure 3 shows in 2012, the decline in visitor numbers to attractions in Wales reflected the trend shown at attractions across the UK. Again this can be attributed to the poor weather in 2012 and well as the Olympics.

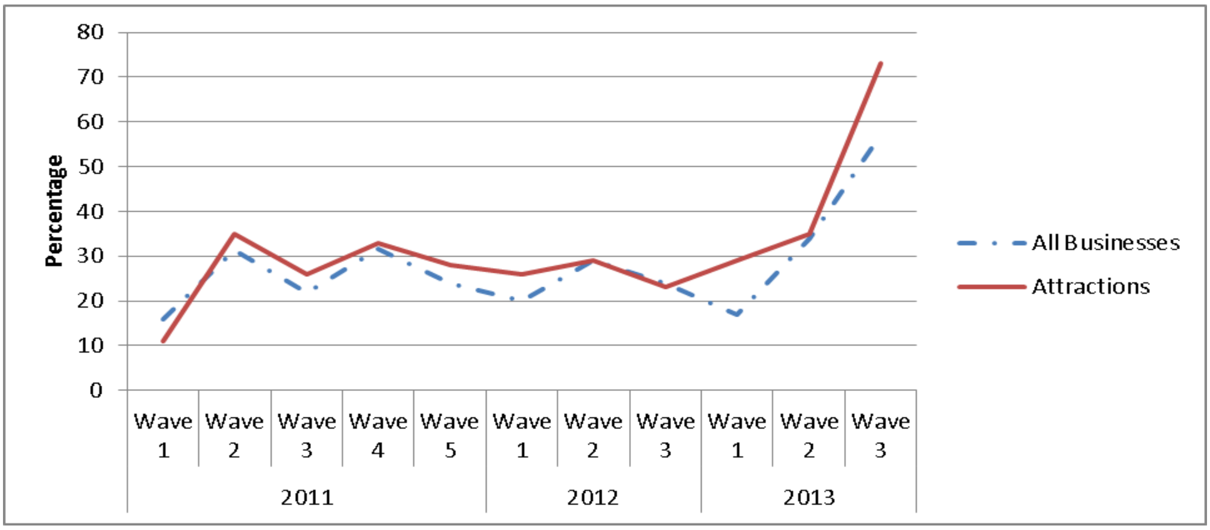
Figure 3 - Welsh Tourist Attraction visitor number 2006-2012



Source - Wales Attractions Survey

4.5 On asking attraction businesses whether they have seen more or less visitors than last year, the Survey of Tourism Businesses reflects the results of the Wales Attractions Survey. Figure 4 and Appendix 1 shows that 2012 was a more difficult year than 2011 for reasons identified in Section 2 of this report. However there are early indicators that, following good summer weather in 2013, visitor numbers have improved, most notably from Wave 3 covering the peak summer months.

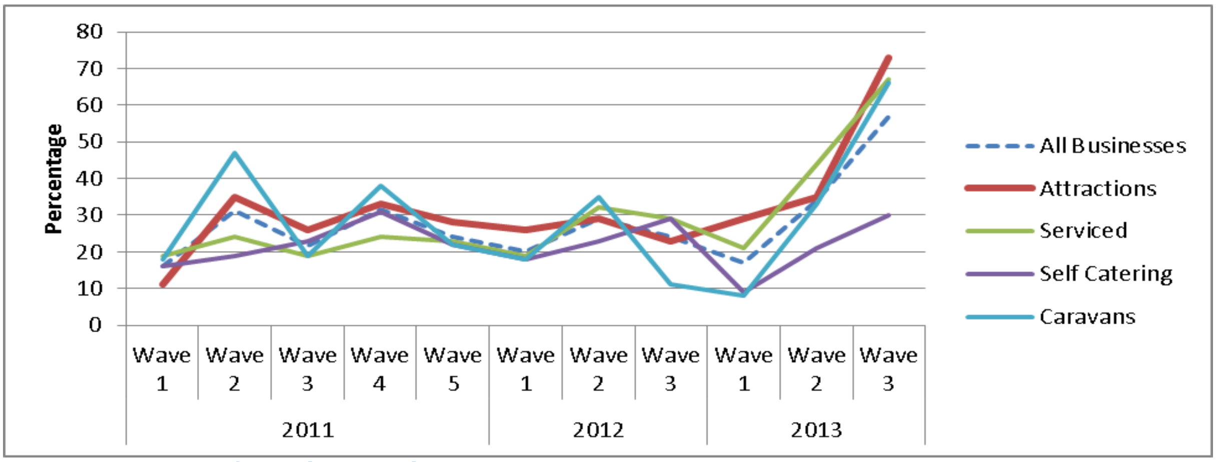
Figure 4 - Have you had more or less visitors compared to this time last year (%)



Source - Survey of Tourism Businesses

4.6 When looking at attractions compared to the overall tourism business sector, Figure 5 shows that the attractions sector has performed favourably in comparison with other tourism sectors over the past 3 years. The Survey of Tourism Businesses suggests that, based on the percentage of respondents reporting higher figures in 2011, 2012 and 2013, more attractions have reported increases in visitor numbers than in other sectors.

Figure 5 - Have you had more or less visitors than this time last year? %



Source - Survey of Tourism Businesses

4.7 Looking in more detail at visitor numbers to attractions, The Wales Attractions Survey shows that there is a marked difference in the performance between free and paid attractions over the past two years. Also there is a difference in performance across the four regions in Wales as well as by ownership.

4.8 Table 2 shows in 2012, visits to free attractions remained steady with an increase of just of 0.5%. Since 2009, the cumulative visits to free admission attractions increased by 3.6%.

4.9 In 2012, the number of visits to paid attractions decreased on average by 10.2%. Since 2009, the cumulative number of visits to paid attractions decreased by 9.9%.

Table 2 - Visits to Attractions 2009-12, Year on year change (%)

	2009	2010	2011	2012	Trend Line
Free	0.0%	-2.0%	5.1%	0.5%	
Paid	0.0%	2.6%	-2.3%	-10.2%	

Source - Wales Attractions Survey 2012

4.9 In 2012, Table 3 shows the decline in visitor numbers to paid attractions is most evident in those under LA ownership. Overall visits to attractions managed by private owners and trusts have remained fairly constant with a rise of 0.2%. All other categories have experienced declines in their visitor numbers: most notably those under the ownership of Local Authorities (with a decline of 15.5%).

4.10 There are also regional differences in visitor volumes to attractions in Wales with a decline most evident in South West Wales.

Table 3 - Comparison of yearly visits 2012/2011 by ownership

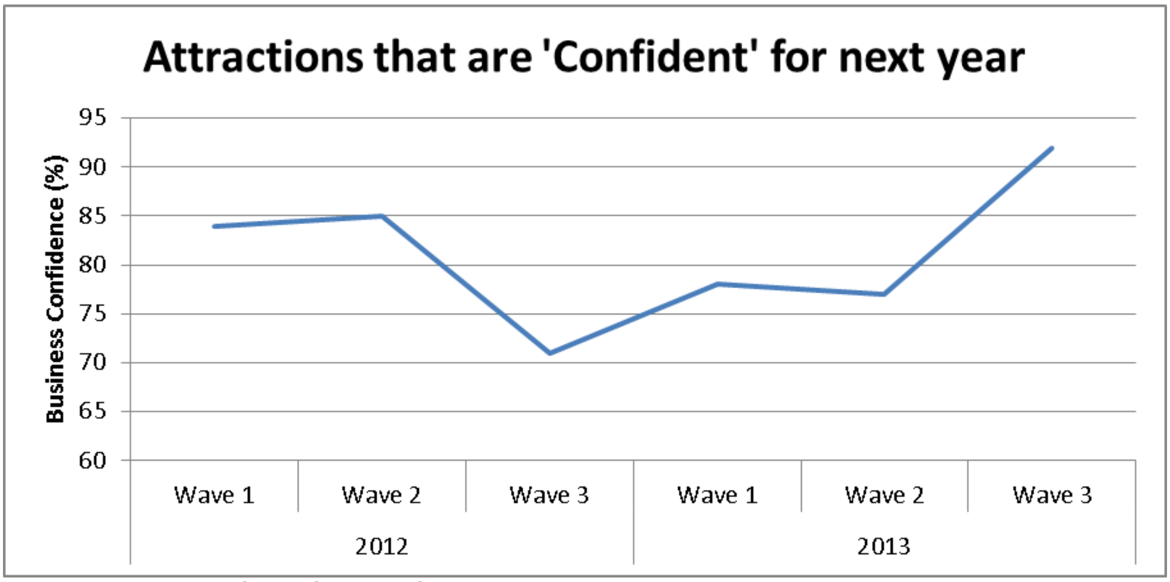
	Sample	Visits 2012	Visits 2011	Increase/ decrease
Cadw	26	1,053,907	1,1,1,047	-6.8%
National Museum Wales	7	1,739,855	1,677,275	+3.7%
Local Authority	45	2,959,963	3,501,979	-15.5%
The National Trust	17	1,042,790	1,140,540	-8.6%
Private Owner/ Trust	62	4,639,614	4,629,760	+0.2%
Total	**157**	**11,436,129**	**12,080,601**	**-5.3%**

Source - Wales Attractions Survey 2012

Business Confidence

The Survey of Tourism Businesses, Figure 6, shows that after a fall in business confidence at the end of the 2012 season, confidence in the attractions sector has risen to a peak at the end of 2013. This rise in confidence follows the rise in attractions reporting increases in visitor numbers as shown in Figure 4.

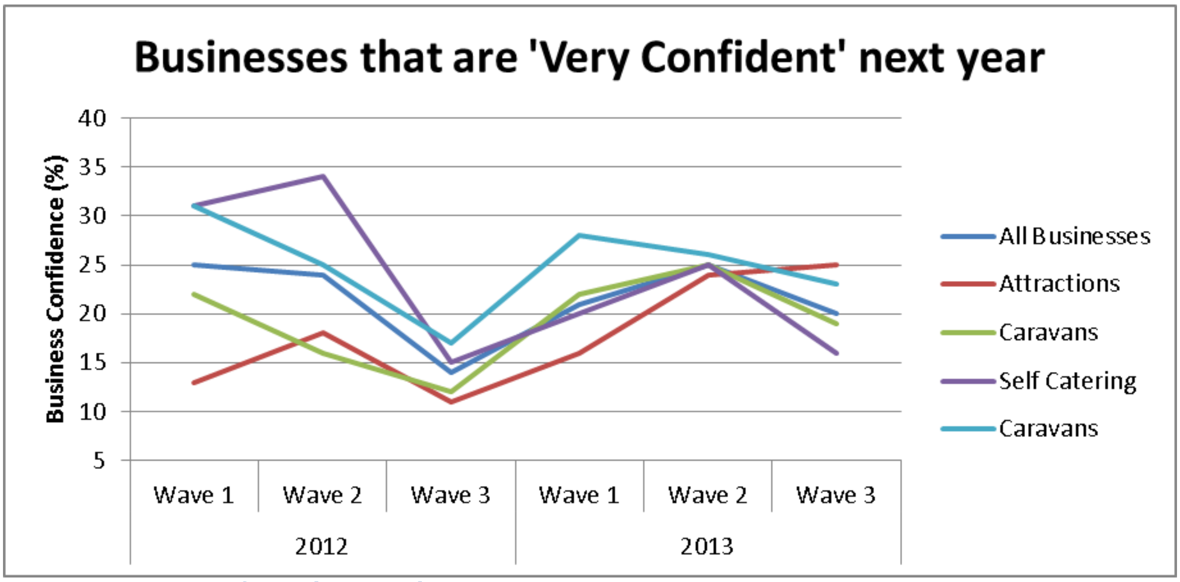
Figure 6 - Confidence levels for Attraction businesses (%)



Source - Survey of Tourism Businesses

4.11 Looking specifically at those sectors that are 'Very Confident' next year, Figure 7 shows the attractions sector reporting less 'Very Confident' businesses in 2012 and early 2013 than the other sectors. The middle and end of 2013 saw an increase in percentage of attractions business saying that they were 'Very Confident'.

Figure 7 - Businesses that are 'Very Confident' for next year



Source - Survey of Tourism Businesses

Admissions

4.12 The Wales Attractions Survey 2012, shows the average adult admission charge in 2012 was £6.92 (up 4.6% on 2011, Table 4) while the average child admission charge was £4.07 (up 3.6% on 2011).

4.13 Table 4 also shows that 2010 had the greatest increase in admission charges over the past 3 years at 5.2% while 2011 and 2012 showed lower average increases of 4.2% and 4.1% respectively.

Table 4 - Admissions Revenue Paid to Attractions – Annual change (%)

	2010	2011	2012	Trend Line
Adult %	4.8	3.5	4.6	
Child %	5.6	4.8	3.6	
Average	5.2	4.2	4.1	

Source - Wales Attractions Survey 2012

4.14 Table 5 shows that cumulatively, between 2009 and 2012, there has been an increase in Adult admission prices by 12.9% and Child admission prices by 14%.

Table 5 - Cumulative Year on Year increase in Admissions Charges (%)

	2009-10	2010-11	2011-12	Trend Line
Adult %	4.8	8.3	12.9	
Child %	5.6	10.4	14	

Source - Wales Attractions Survey 2012

Revenue

4.15 In 2012, Table 6 shows that, as expected, the average total revenue per visitor to paid attractions is significantly higher than that of visitors to free attractions. The average revenue for all attractions stands at £6.51 (up from £6.27 in 2011). This is made up from an average of £2.93

amongst free attractions in 2012, and £9.26 amongst paid admission attractions.

4.16 Looking back over the last 3 years, Table 6 also shows that average revenues per person have decreased for free attractions by approximately 20% from 2010 to 2012. Conversely, paid attractions have seen an increase of average revenues by approximately 39% over the period 2010-2012.

Table 6 - Average Revenue per Person including admission fees (£)

	2009	2010	2011	2012	Trend Line
Free		£3.67	£2.47	£2.93	
Paid		£6.68	£8.66	£9.26	
Average	£5.95	£5.95	£6.27	£6.51	

Source - Wales Attractions Survey 2012

4.17 When looking at how free and paid attractions perform when excluding the admissions fees, Table 7 shows that spend per visitor for free attractions has decreased over the past three years, whereas the spend per visitor for paid attractions has steadily increased.

4.18 This indicates that paid attractions are not only increasing admission fees to maintain revenue, but they have worked broadly across all revenue streams to increase visitor expenditure.

Table 7 - Revenue to All Attractions - excluding admission fees

	2010	2011	2012	Trend Line
Free	**£3.67**	**£2.33**	**£2.93**	
Paid	**£2.87**	**£4.13**	**£4.25**	

Source - Wales Attractions Survey 2012

4.19 As with to visitor volumes, the total revenue varies considerably by region as well as by types of attraction. Average revenue was lower in South East Wales (where there are a high proportion of free-entry attractions).

4.20 The Wales Attractions Survey 2012 showed that, as expected average admission prices also varied considerably between types of attractions. For example, paid museums / galleries charged an average admission fee of £2.44, but railway and tram attractions charge four times this amount (£9.77).

4.21 The 2011 Wales Attractions Survey showed the highest revenue recorded for paid industrial and craft attractions (an average of £14.09 per visitor) compared to free admission country parks, gardens and other natural attractions, with an average revenue per visitor of £2.40.

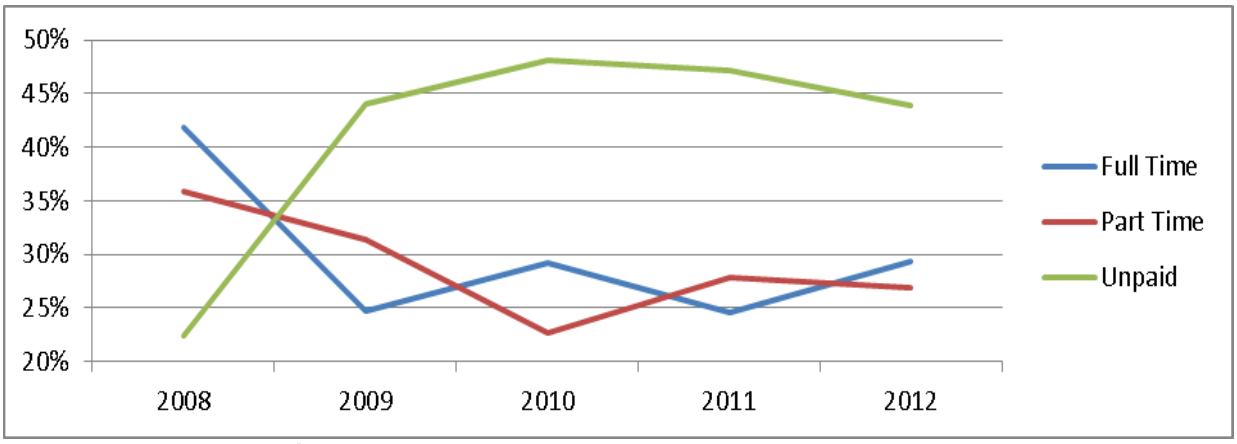
Employment

4.22 Figure 8 shows that in 2012, unpaid volunteers accounted for nearly 44% of the workforce at attractions with Full-time permanent staff accounting for 29%.

4.23 In 2012, the number of unpaid volunteers increased by 22% on 2008, with full-time and part-time employees having decreased by 13% and 9% respectively.

4.24 This shows a significant shift in employment contracts in the Attractions sector since 2008, with the majority of employment now being volunteers. However since 2010 there is evidence of a an increase in paid employment (full + part-time) and accompanying reduction in volunteers.

Figure 8 - Total employment by employment contract



Source - Wales Attractions Survey 2012

5. Visitor Information

Overnight Staying Visitors in Wales

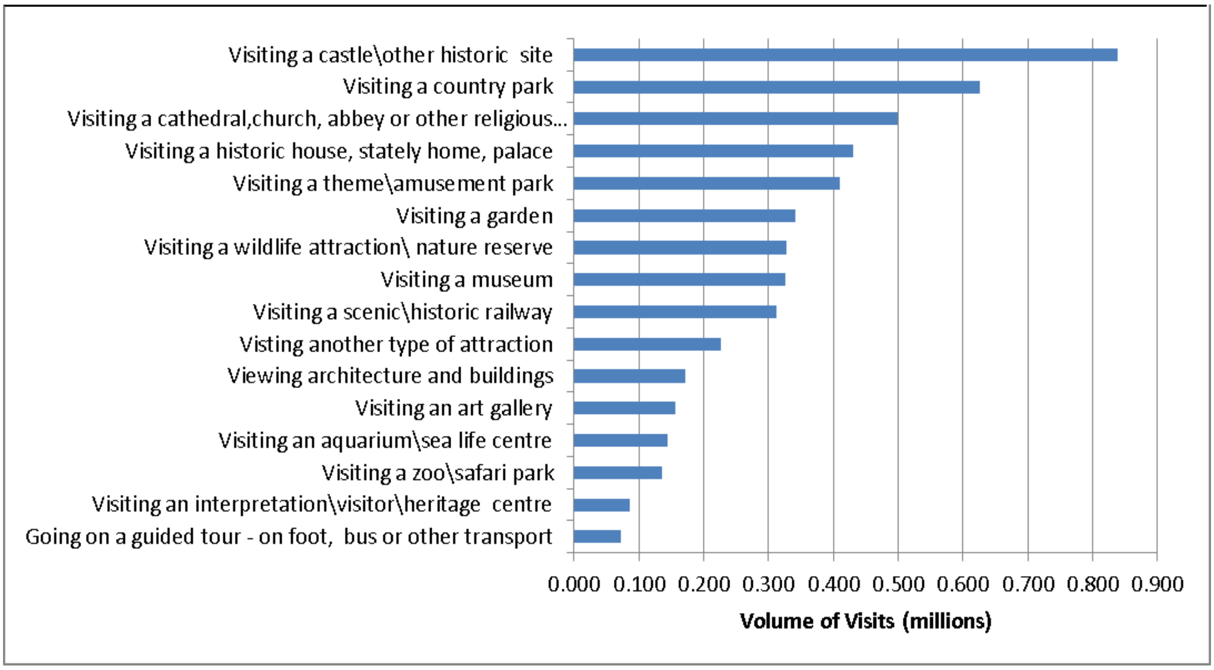
5.1 The Great Britain Tourism Survey (GBTS) is a national consumer survey and the source of official statistics, measuring the volume and value of overnight trips taken by Great Britain residents.

5.2 In 2012, domestic overnight staying visitors in Wales made up around 8% of the GB domestic overnight staying visitor volume (9.6 million trips to Wales out of 126 million overnight staying trips in GB).

5.3 In 2012, overnight staying visitors made 4.9 million trips to attractions in Wales up from 4.8 million in 2011. This equates to around 44% of all visits to attractions in Wales.

5.4 Looking more closely at the types of attractions visited in Wales Figure 9 shows that Visiting castles and other historic sites are top of the list of things to do followed by Visiting a country park and then by Visiting a cathedral, church, abbey or other religious building.

Figure 9 - Volume of Visits to Attractions by Visitors to Wales

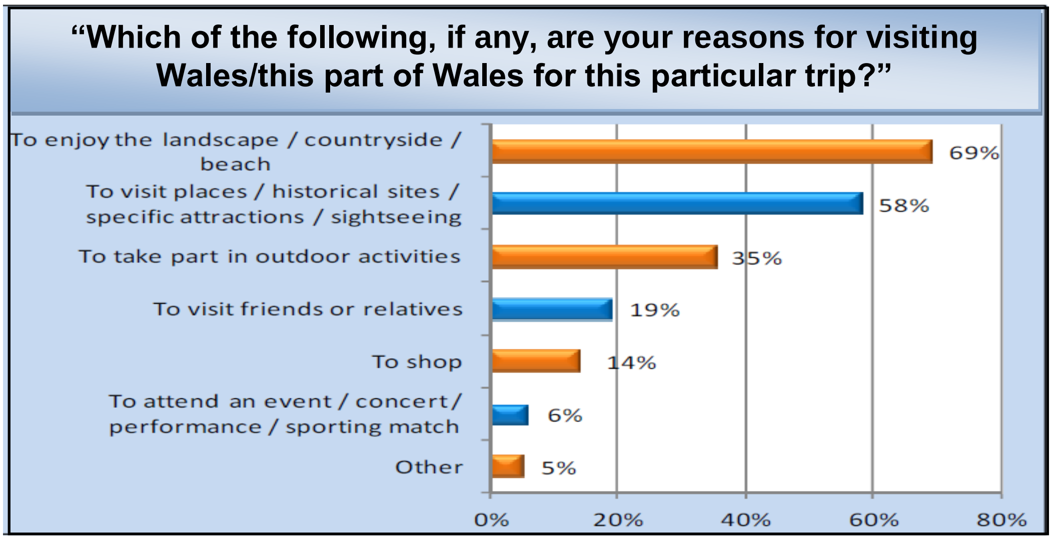


Source - GBTS 2012

N.B. Visitors can go to more than one type of attraction

5.5 The Wales Visitor Survey 2013 (GB Staying Visitors) shows that visiting attractions was the second highest rated reason to visit Wales. Figure 10 shows that in 2013, 58% of staying visitors to Wales did so for the reason to 'Visit places/historical sites/specific attractions/sightseeing', which increased by 20% from 38% in 2011.

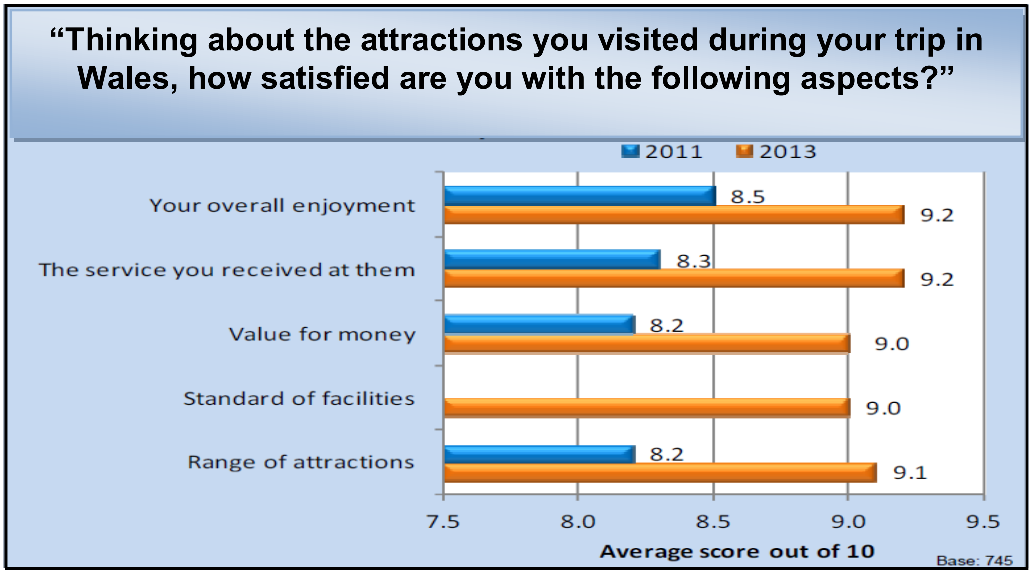
Figure 10 - Motivation to Visit Wales - GB Staying Visitors



Source - Wales Visitor Survey 2013

5.6 Figure 11 shows that staying visitors to attractions in Wales in 2013 enjoyed themselves greatly. Using a scale of 1-10, average enjoyment scored 9.2, well up from 8.5 in 2011.

Figure 11 - Rating of Welsh Attractions - GB Staying Visitors



Source - Wales Visitor Survey 2013

5.7 The Wales Visitor Survey 2013 also highlighted regional differences in the main motivation to visit Wales, particularly between the South East region and the rest of Wales. In the South East, 37% say the main reason to visit is ‘visiting places/historical sites etc.’ compared to 17% elsewhere.

Day Visitors to Wales

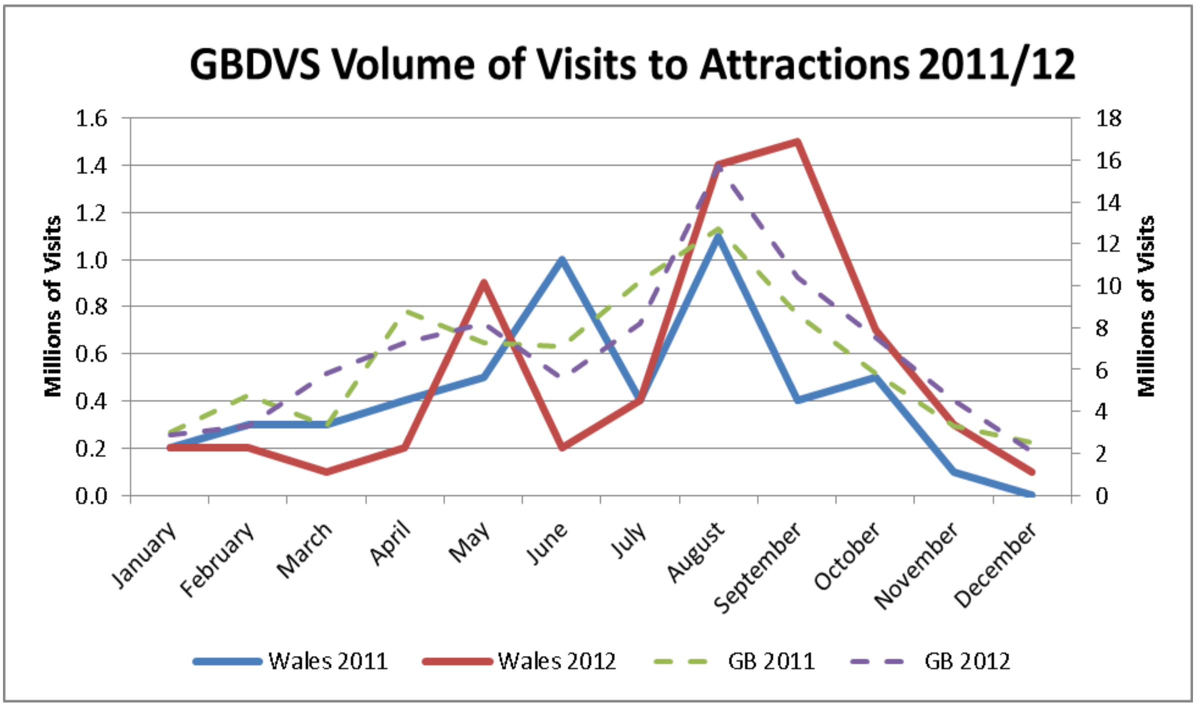
5.8 The Great Britain Day Visit Survey (GBDVS) is the official survey that measures participation in Tourism Day Visits taken to destinations in Britain by the residents of England, Scotland and Wales. GBDVS has been reporting since 2011. For robustness of data the 2011/2012 averages are used in this report.

5.9 Based on an average of 2011 and 2012 results, there were 5.2 million day visits to Welsh visitor Attractions annually. This accounts around 44% of all visits to attractions in Wales and just over 6% of the 79.5 million visits to attractions in GB by day visitors, (Appendix 2).

5.10 Comparing GBDVS monthly data for 2011 and 2012 in Wales and GB (Appendix 3), both show two distinct peak periods of Easter and then Summer. Figure 12 shows that Wales peaks slightly later than GB and for shorter but more intense periods.

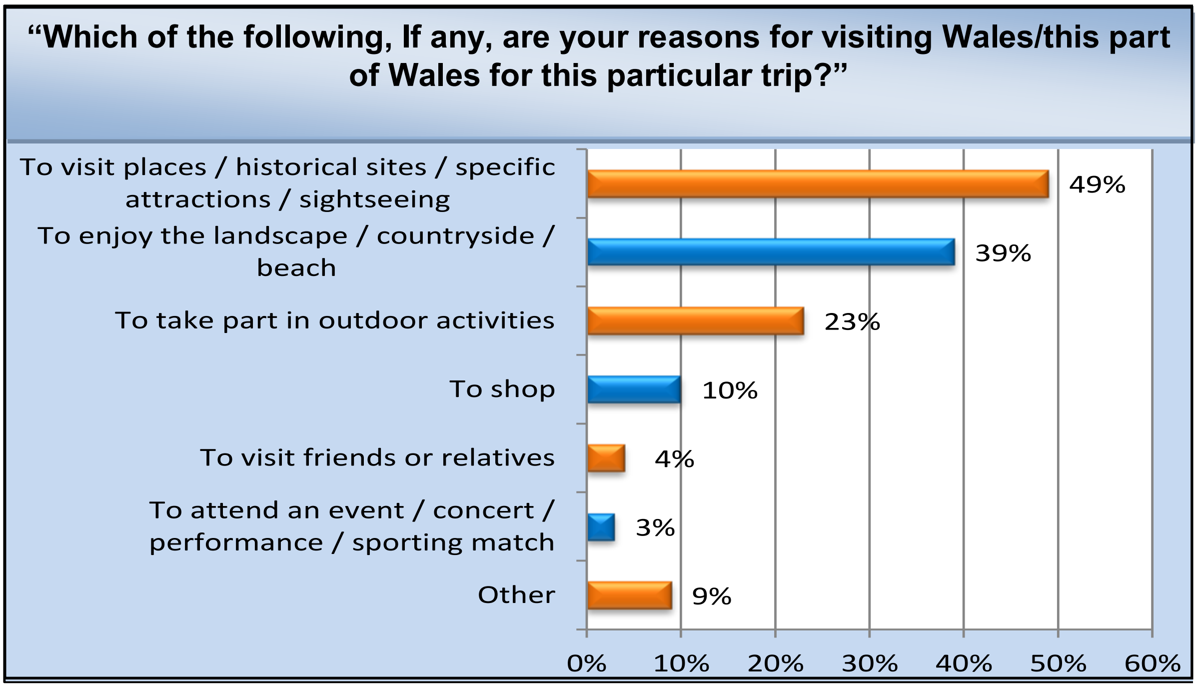
5.11 From the Wales Visitor Survey 2013 for Day Visitors, Figure 13 shows that the top reason to visit Wales on a day trip was ‘Visiting an attraction, historical site, specific attractions, sightseeing’ (49%). This was followed by ‘Enjoying the landscape, countryside and beach’ and in third place ‘To take part in outdoor activities’.

Figure 12 - GB Comparison of GBDVS Visits to Attractions 2011-2012



Source - GBDVS, GBTS

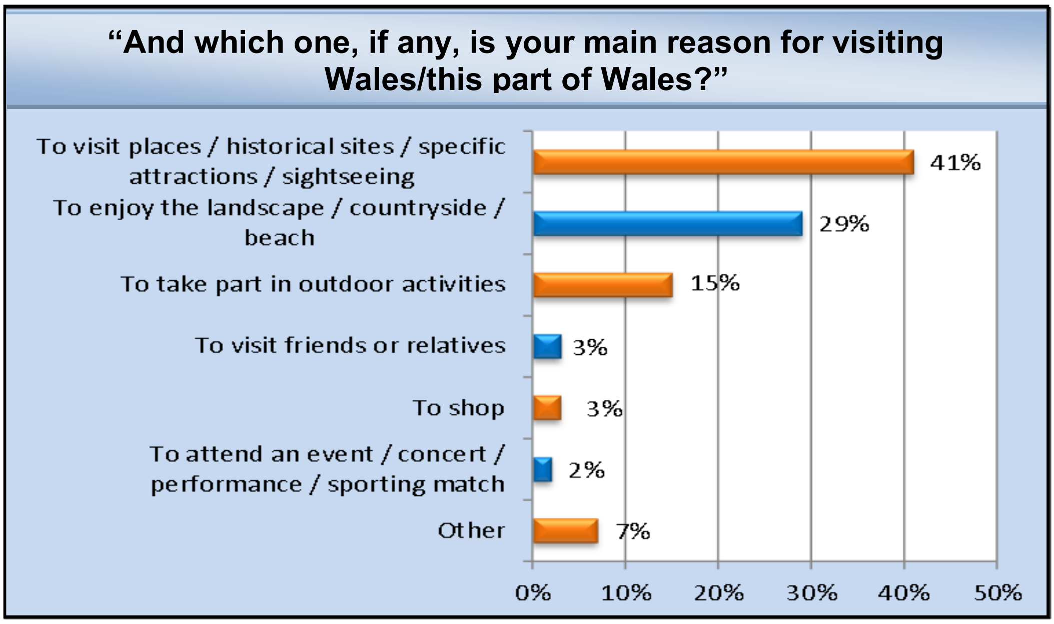
Figure 13 - Overview of Motivation – Day visitors



Source - Wales Visitor Survey 2013

5.12 Figure 14 shows that 'Visiting historical sites/specific attractions/sightseeing' is the main reason for taking a day trip to/in Wales at (41%). Visiting attractions is far more pronounced as the main reason to visit for day visitors in comparison with staying visitors with only 23% of staying visitors give this as their main reason to visit. For staying visitors 'To enjoy the landscape/countryside/beach' is much more popular reason to visit Wales at 42%.

Figure 14 - Main reason to Visit Wales – Day Visitors

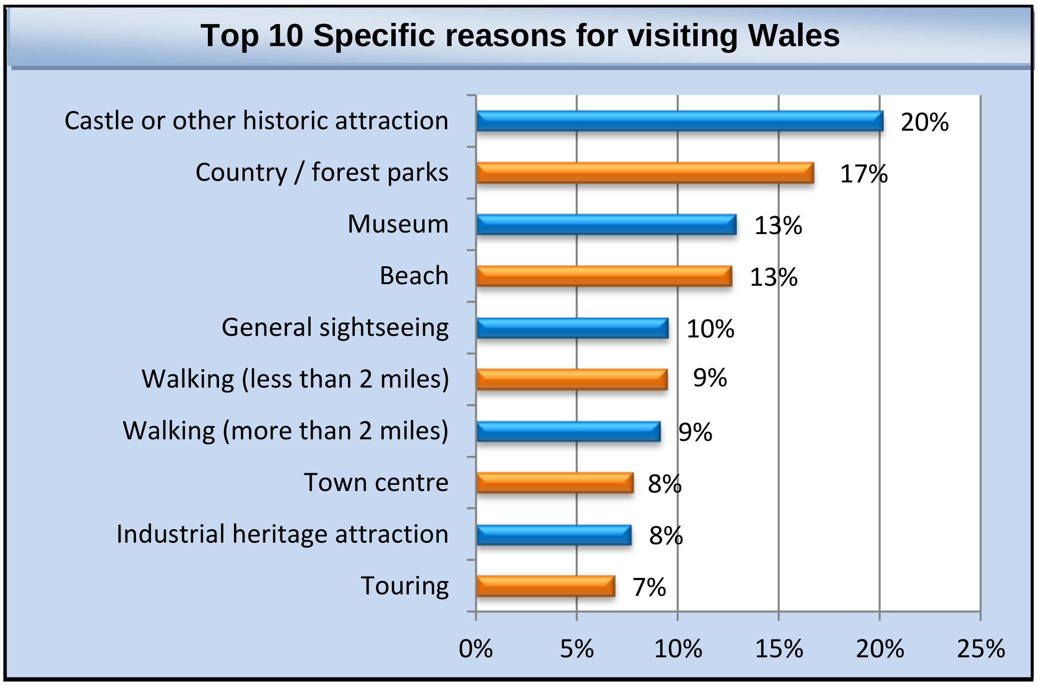


Source - Wales Visitor Survey 2013

5.13 As with staying visitors, there is a regional difference in reasons for visiting. In the South East, 'Visiting places/historical sites etc.' is the most frequent main reason for visiting (44%), ahead of the second placed motivation, 'To enjoy landscape/countryside/beach' (25%).

5.14 Figure 15 shows that visiting a castle or historic attraction is the most frequently mentioned specific reason for visiting Wales, featuring in one in five (20%) day trips. This is closely followed by country / forest parks (17% of day trips).

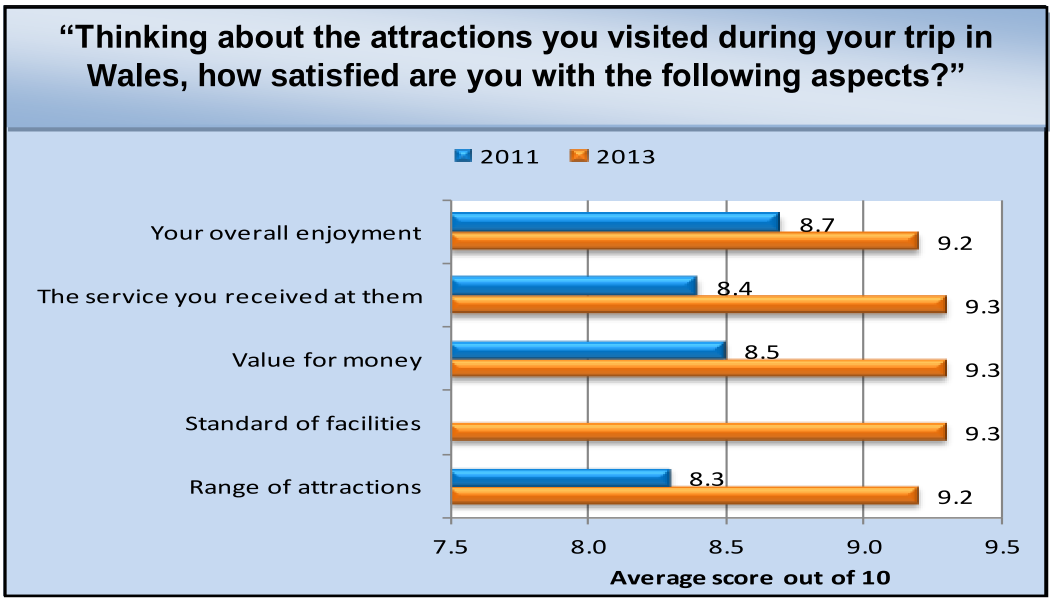
Figure 15 - Specific reasons for visiting - Wales Visitor Survey 2013 – Day Visitors



Source - Wales Visitor Survey 2013

5.15 Figure 16 shows that day visitors to attractions in Wales in 2013 have enjoyed themselves greatly, with the overall average enjoyment score at 9.2 up from 8.7 in 2011. The range of attractions rating has also improved to 9.2 in 2013 from 8.3 in 2011.

Figure 16 - Satisfaction of Attractions rating - Day Visitors



Source - Wales Visitor Survey 2013

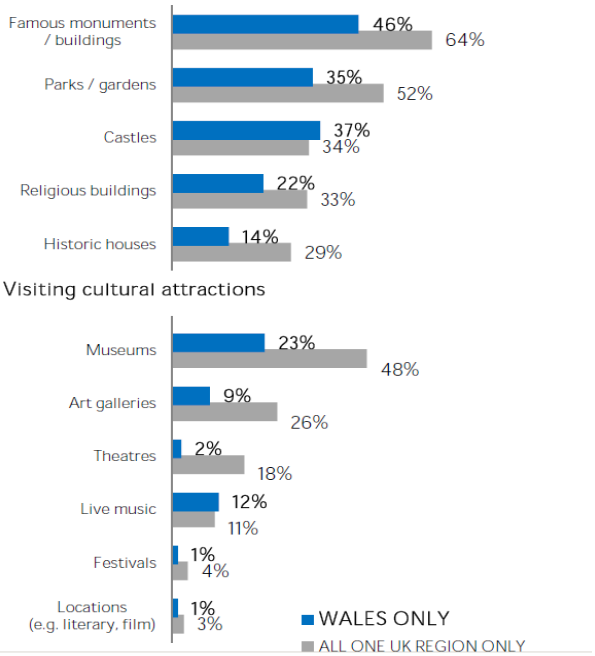
Overseas Visitors

5.16 The International Passenger Survey showed that around 3% of all overseas visitors to the UK stay in Wales (just under 0.9 million in 2012) and they make up around 10% of all visits to attractions in Wales.

5.17 Wales welcomes a relatively high proportion of overseas visitors with children and is especially popular in spring and early summer. In particular Welsh castles are very popular, and are one of the most appealing 'Only in Britain' activities for potential visitors. (Inbound tourism to Britain's nations and regions, September 2013, Visit Britain). South East Wales, primarily Cardiff, welcomes the highest proportion of overseas visits to Wales.

5.18 Figure 17 shows that overseas visitors to Wales are somewhat less likely to visit heritage related attractions than overseas visitors to Britain as a whole. Still, over two in five holiday visits to Wales included seeing a famous building or monument, over a third went to a park or garden, 22% to a religious building and 14% to a historic house and 37% of holiday visits included at least one Welsh castle.

Figure 17 - Propensity for holidays to involve visiting heritage and cultural attractions

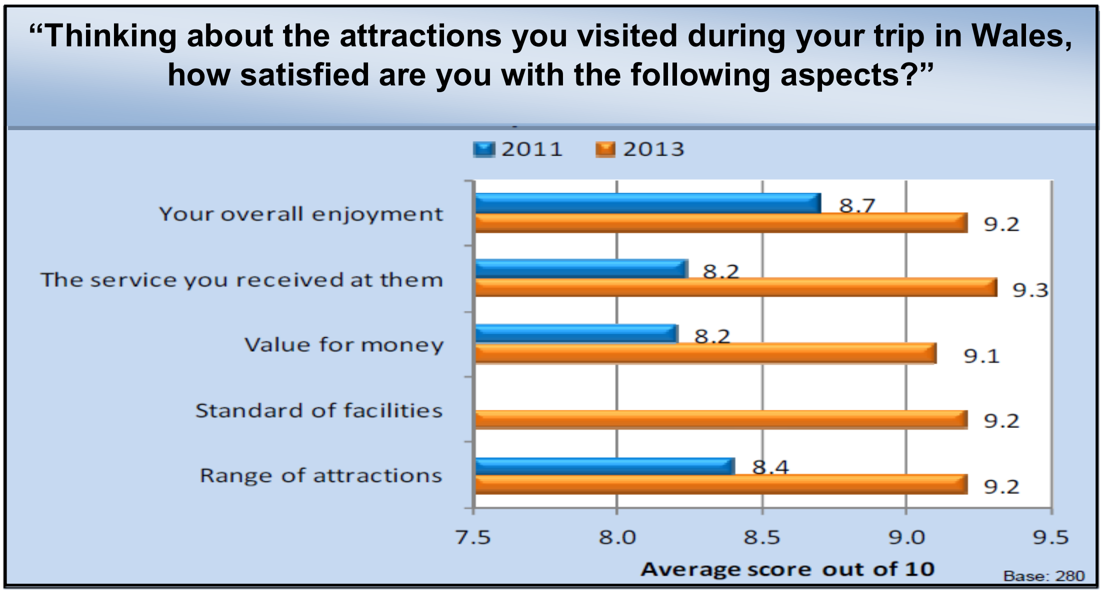


Source - (Inbound tourism to Britain's nations and regions, Sept 2013, Visit Britain)

5.19 In 2010, VisitBritain asked people in 20 countries around the world what the top three activities they would most like to do on a British holiday are. 34% responded to ‘Go on a tour of the castles of Wales’. Further analysis showed that women were even more likely than men to want to tour Welsh castles (38% women compared to 31% of men).

5.20 Figure 18, based on the Wales Visitor Survey 2013, shows that in 2013, overseas visitors highly rated the attractions offered in Wales at 9.2, up 0.5 points from 8.7 in 2011. All aspects of service, value and standard are well rated and greatly improved from 2011.

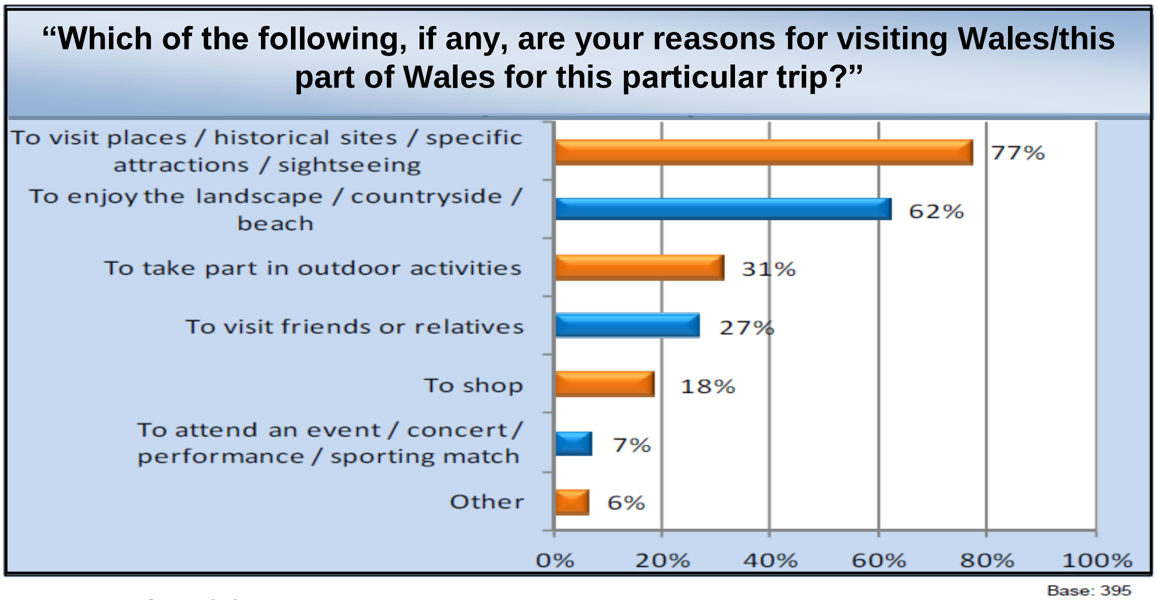
Figure 18 - Attractions Ratings – Overseas Visitors



Source - Wales Visitor Survey 2013

5.21 Figure 19 from The Wales Visitor Survey 2013 shows that the motivation ‘To visit places/historical sites/ specific attractions/ sightseeing’ was the top reason to visit. This has risen significantly from 65% of trips in 2011 to 77% in 2013.

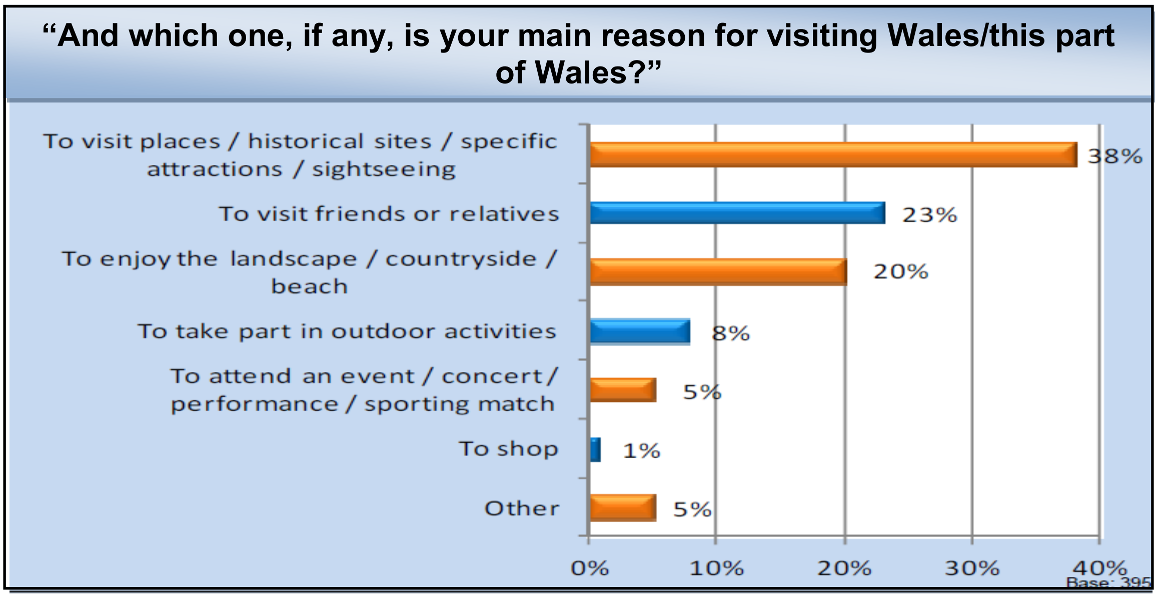
Figure 19 - Overview of Motivation - Wales Visitor Survey 2013



Source - Wales Visitor Survey 2013

5.22 Similarly, Figure 20 shows that 'To visit places/historical sites/ specific attractions/ sightseeing' is also the main reason for visiting at 38%. Visiting attractions is the greatest motivation for overseas visitors which is nearly as influential as the combined 2nd and 3rd ranked motives 'To visit friends or relatives' and 'To enjoy the landscape/ countryside/ beach'.

Figure 20 - Main Reason for Visiting - Overseas Visitors

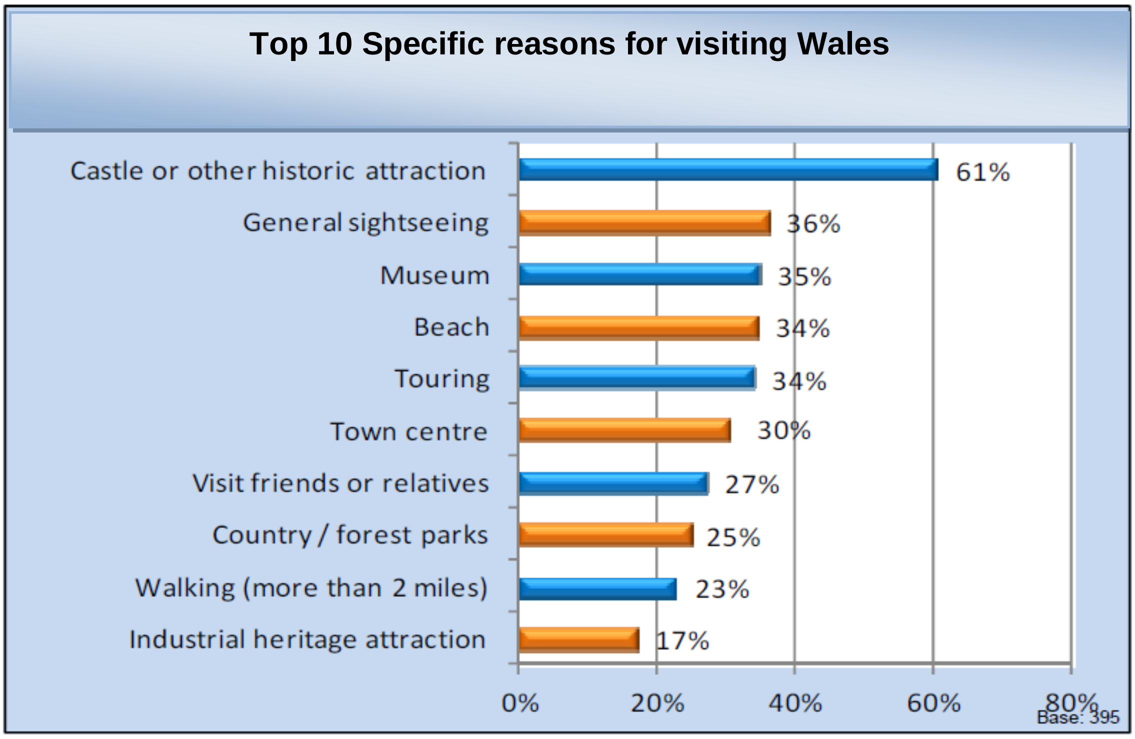


Source - Wales Visitor Survey 2013

5.23 The motivation to visit by overseas visitors differs geographically. 85% of overseas visitors go to South East Wales 'To visit places/ historical sites/ specific attractions/ sightseeing' which is far higher than the rest of Wales at 68%. (Wales Visitor Survey 2013)

5.24 Wales offers a wealth of castles and historical attractions that are very attractive to the overseas market. Figure 21 shows that three in five (61%) overseas visitors have been to a castle or historic attraction in 2013 – much higher than the second most common activity (general sightseeing – 36%).

Figure 21 - Specific reasons for Visiting Wales - Overseas Visitors



Source - Wales Visitor Survey 2013

5.25 Propensity to visit Welsh castles and historic attractions appears to be higher among nationalities which are not used to seeing such sites in their own country. About two in three (68%) American visitors have visited a castle or historic attraction, as have 65% of Canadians and 64% of Australians. This compares to 58% of Europeans.

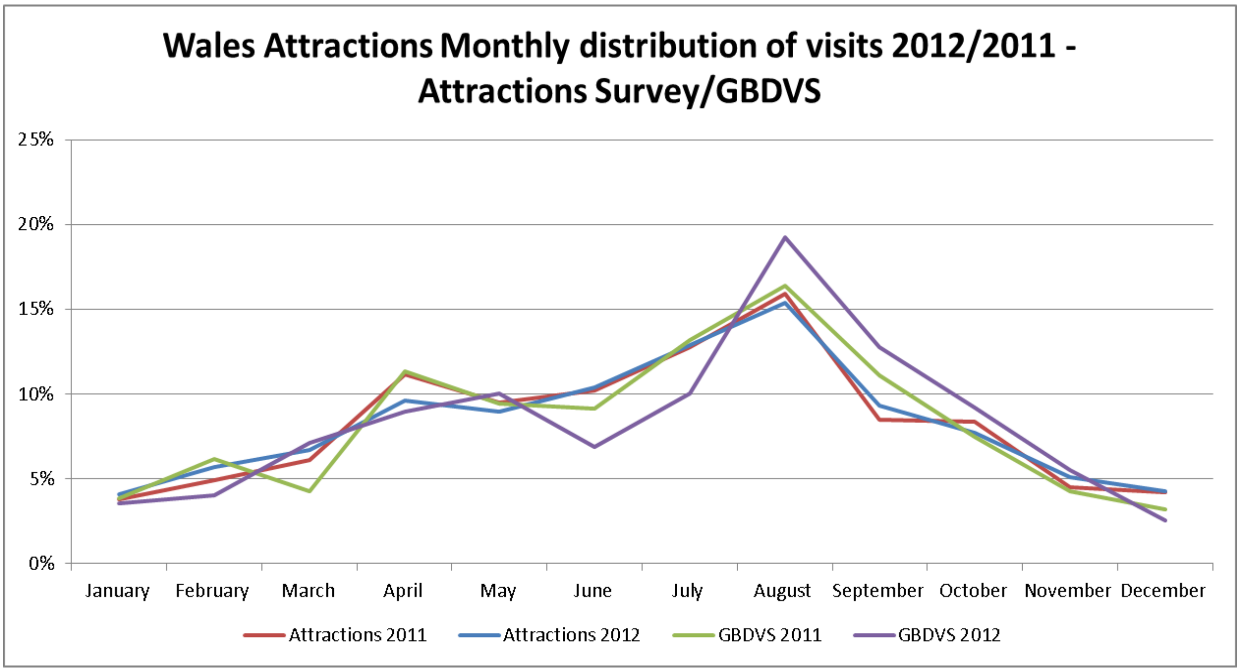
6. Appendix

1. Have you had more or less visitors than this time last year? (%)

	2011					2012			2013		
	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
All Businesses	16	31	22	32	24	20	29	24	17	34	57
Attractions	11	35	26	33	28	26	29	23	29	35	73
Serviced	19	24	19	24	23	19	32	29	21	44	67
Self Catering	16	19	23	31	22	18	23	29	9	21	30
Caravans	18	47	19	38	22	18	35	11	8	33	66

Source - Wales Tourism Business Survey

2. Comparing results of monthly GBDVS data with regards to the Wales Visitor Attractions report for the years 2011 and 2012, we can see there is a very good match of the two sets of data.



Source – Wales Attractions Survey / GBDVS

3. Volume of visits to attractions – GB Day Visitors

(millions)	Wales 2011	Wales 2012	GB 2011	GB 2012
January	0.2	0.2	3	2.9
February	0.3	0.2	4.8	3.3
March	0.3	0.1	3.3	5.8
April	0.4	0.2	8.8	7.3
May	0.5	0.9	7.3	8.2
June	1.0	0.2	7.1	5.6
July	0.4	0.4	10.2	8.2
August	1.1	1.4	12.7	15.7
September	0.4	1.5	8.6	10.4
October	0.5	0.7	5.8	7.5
November	0.1	0.3	3.3	4.5
December	-	0.1	2.5	2.1
Total	**5.2**	**6.3**	**77.4**	**81.5**
	Average	**5.8**	**Average**	**79.5**

Source - GBDVS