

Summary of Wales Bedstock Data : Situation as at March 2013

Information on Accommodation Bedstock in Wales is not only a Eurostat requirement but is also required for the practical purpose of gaining an accurate picture of the composition of one of the most significant parts of the Tourism industry in Wales. This information is important for planning and investment purposes and also as input into various calculations of tourism flows, especially at local level. It can also be useful in terms of planning for major events, e.g. gauging accommodation stock within a given radius of a potential event. In respect of Eurostat, an annual 'snapshot' is provided in November/December, which is merged with similar data from other parts of the UK.

Bedstock Surveys are necessary because there is no other way of keeping an accurate record of total accommodation. One reason for this is that there is currently no Statutory Registration of accommodation in Great Britain as is the case in some European countries (e.g. France, Ireland) especially for the Hotel and serviced accommodation sectors. Another potential data source is information from grading schemes but not all accommodation establishments choose to be graded, so grading information can only provide a partial record of all existing stock. Also, because of the significance of self-catering accommodation (including caravans) in Wales, it is also important to cover these sectors in equal detail.

Accommodation Bedstock surveys have for some years been an area of positive collaboration between the Welsh Government, Local Authorities and Regional Tourism Partnerships. The surveys have been jointly funded and undertaken according to a standard method (using standard questionnaires and definitions), with the results being provided for collation centrally by the Welsh Government.

The accommodation bedstock picture is constantly changing as new establishments open or close, expand or contract, upgrade or diversify. It follows that the records can only provide the best available 'snapshot' of the situation at a given point in time. Generally, records are updated annually by the local authorities, with a full survey undertaken every 3 years. The aggregated, composite total for Wales is based on best available information in November/December each year at the time of transmission to Eurostat. Bedstock records are thus in one sense always 'work in progress' but with each iteration, we are striving for greater accuracy and precision and also closer correlation with other datasets (e.g. grading).

The tables below, relating to Accommodation Establishments and Accommodation Bedspaces, summarise the top line figures based on data gathered by end March 2013. Further analysis and correlation to other datasets is ongoing.

Accommodation Establishments

There are currently 11,868 accommodation properties/establishments in Wales, with 3,205 (27%) in the Serviced sector (Hotels, Guest houses, B&Bs), 7,067 (60%) in Self Catering and 1,322 (11%) in Camping/Caravanning. Additionally, there are 224 Hostels/Bunkhouses and 50 establishments in the Alternative category (including nomadic structures such as tipis, yurts, and Romany caravans).

Accommodation Bedspaces

However, in terms of Bedspaces, the distribution between sectors is quite different, reflecting the dominance of Caravans/Camping in terms of total bedspaces.

There are 79,086 bedspaces in Serviced accommodation out of a Wales total of 559, 691 – some 14% of the total. The average number of bedspaces per Serviced establishment is thus around 25, which reinforces the fact that many of these businesses are very small.

There are 63,061 bedspaces in self catering (cottages, apartments etc), equating to an average of just under 9 bedspaces per establishment. Self-catering represents about 11% of total bedspaces.

Though very difficult to calculate precisely, the figures indicate that there are almost 400,000 bedspaces in Camping/Caravanning, equating to an average of some 302 bedspaces per establishment (or around 75 caravans/units, assuming 4 berths per unit). Obviously, there is great variation between holiday parks/sites, with some accommodating hundreds of caravans and others just a few. Over 70% of Wales' bedspaces are in Camping/Caravanning (touring and static).

Variation between Local Authorities

There is considerable variation between local authorities in terms of the total volume and composition of accommodation stock.

Pembrokeshire has 3,159 accommodation establishments while Gwynedd has 2,722. These two authorities account for almost half the accommodation establishments in Wales as a whole. In both counties, some two-thirds of these establishments are self-catering cottages/apartments.

Four counties have more than 400 serviced accommodation establishments: Gwynedd, Pembrokeshire, Powys and Conwy.

In terms of bedspaces, Gwynedd heads the table with 124,493 bedspaces, with almost 80% of these in Camping/Caravanning. Pembrokeshire has 99,329 bedspaces with some 72% of these in Camping/Caravanning. Conwy has 83,193 bedspaces, over 80% of which are in Camping/Caravanning. These figures reflect the presence of many of the larger holiday parks and camping sites in these counties.

The more urban counties of South East Wales generally have a greater proportion of serviced accommodation in relation to total bedspaces: Cardiff has 10,739 serviced bedspaces, some 76% of all bedspaces in the county and almost 14% of all serviced accommodation bedspaces in Wales as a whole.

While Swansea has 4,605 bedspaces (in 139 establishments), these represent some 15% of total bedspaces in the county as a whole, which includes 21,341 bedspaces in Camping/Caravanning (in 52 establishments), located mostly in Gower.

Conwy, which includes Llandudno, has 11,692 serviced bedspaces, the highest for any authority in Wales, though, due to the existence of many large holiday parks in the county (with 67,123 bedspaces in 139 establishments), the serviced bedspaces represent only 14% of bedspaces in that county.

Further information on Bedstock surveys is available on request.

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Number of Accommodation Establishments by Category

Local Authority	Serviced	Self Catering	Caravan/ camping	Hostel	Alternative	Total
Anglesey	133	177	78	2		390
Blaenau Gwent	9	1	1			11
Bridgend	51	18	9	2	1	81
Caerphilly	30	10	3			43
Cardiff	84	20	1	12		117
Carmarthenshire	155	243	55	10	11	474
Ceredigion	200	372	81	21	13	687
Conwy	409	490	139	22	1	1061
Denbighshire	223	78	77	4		382
Flintshire	43	13	17			73
Gwynedd	400	1940	338	44		2722
Merthyr Tydfil	18	3	1	4		26
Monmouthshire	131	160	34	6	2	333
Neath Port Talbot	30	48	7	6		91
Newport	61	6	4	1		72
Pembrokeshire	453	2419	249	31	7	3159
Powys	446	623	133	48	15	1265
Rhondda	34	8	1	2		45
Swansea	162	356	52	5		575
Torfaen	12	4				16
Vale of Glamorgan	69	46	20	2		137
Wrexham	52	32	22	2		108
Wales	3205	7067	1322	224	50	11868

Number of Accommodation Bedspaces by Category

Local Authority	Serviced	Self Catering	Caravan/camping	Hostel	Alternative	Bedspace Total
Anglesey	2783	3671	22445	106		29005
Blaenau Gwent	230	12	180			422
Bridgend	2055	223	9334	56	4	11672
Caerphilly	838	54	366			1258
Cardiff	10739	717	249	2352		14057
Carmarthenshire	2760	2610	11099	774	352	17595
Ceredigion	2806	4102	23412	2245	205	32770
Conwy	11692	3580	67123	796	2	83193
Denbighshire	4820	1113	17570	130		23633
Flintshire	1712	115	16893			18720
Gwynedd	7961	15546	97275	3711		124493
Merthyr Tydfil	649	48	150	142		989
Monmouthshire	2867	1004	3182	213	21	7287
Neath Port Talbot	1153	357	656	391		2557
Newport	3731	343	964	646		5684
Pembrokeshire	6555	19681	71373	1469	251	99329
Powys	6077	5579	26857	1698	178	40389
Rhondda	933	77	258	759		2027
Swansea	4605	3743	21341	1412		31101
Torfaen	635	32				667
Vale of Glamorgan	2188	393	6335	173		9089
Wrexham	1297	168	2062	227		3754
Wales	79086	63168	399124	17300	1013	559691

Notes on the use of statistical articles

Statistical articles generally relate to one-off analyses for which there are no updates planned, at least in the short-term, and serve to make such analyses available to a wider audience than might otherwise be the case. They are mainly used to publish analyses that are exploratory in some way, for example:

Introducing a new experimental series of data

A partial analysis of an issue which provides a useful starting point for further research but that nevertheless is a useful analysis in its own right; Drawing attention to research undertaken by other organisations, either commissioned by the Welsh Government or otherwise, where it is useful to highlight the conclusions, or to build further upon the research;

An analysis where the results may not be of as high quality as those in our routine statistical releases and bulletins, but where meaningful conclusions can still be drawn from the results.

Where quality is an issue, this may arise in one or more of the following ways:

being unable to accurately specify the timeframe used (as can be the case when using an administrative source);
the quality of the data source or data used; or
other specified reasons.

However, the level of quality will be such that it does not significantly impact upon the conclusions. For example, the exact timeframe may not be central to the conclusions that can be drawn, or it is the order of magnitude of the results, rather than the exact results, that are of interest to the audience.

The analysis presented does not constitute a National Statistic, but may be based on National Statistics outputs and will nevertheless have been subject to careful consideration and detailed checking before publication. An assessment of the strengths and weaknesses in the analysis will be included in the article, for example comparisons with other sources, along with guidance on how the analysis might be used, and a description of the methodology applied.

Articles are subject to the release practices as defined by the release practices protocol, and so, for example, are published on a pre-announced date in the same way as other statistical outputs.