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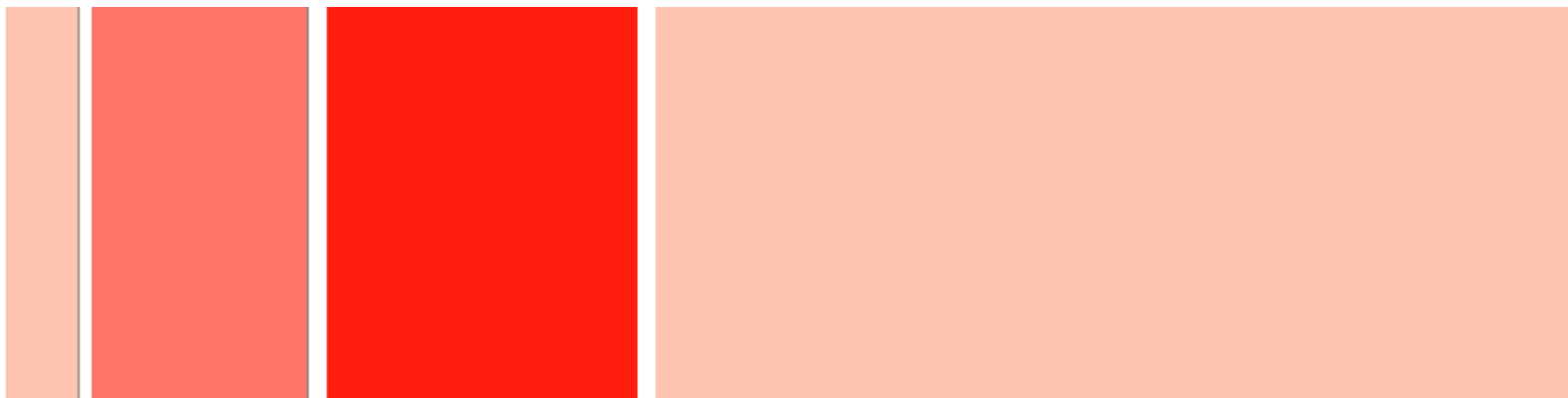
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Tourism Profile – South East Wales

2014 - 2016



Title: Tourism Profile – South East Wales 2014 - 2016

Subtitle: Summary of tourism trends for the South East Wales region 2014 – 2016

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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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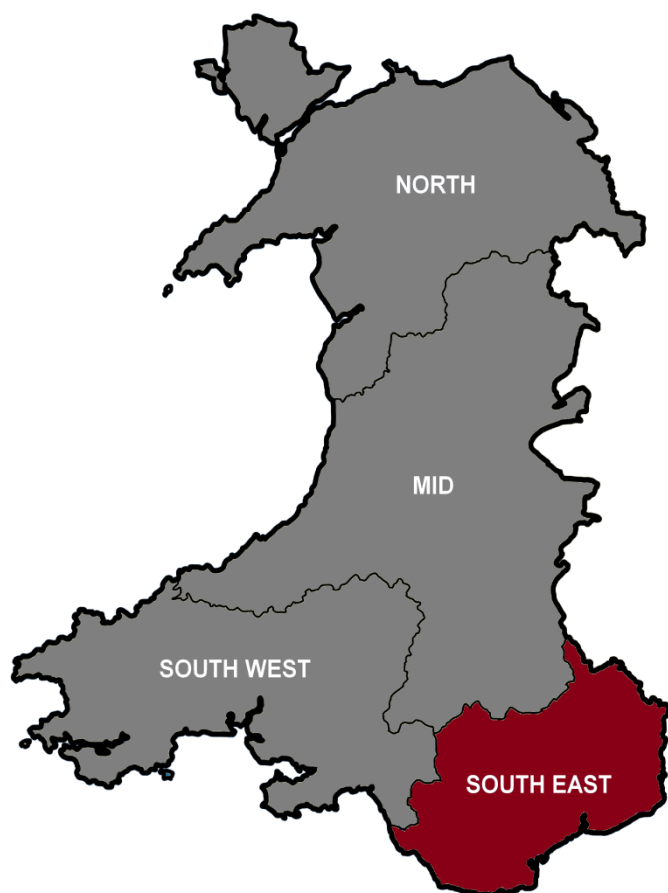
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This report contains tourism-related data for the South East Wales region for the period 2014-2016 providing comparisons with the overall GB level, all-Wales level and the other regions of Wales. Please refer to the other three Wales regional tourism profiles also and the local authority profile for comparative information. Following the advice of the Office for National Statistics, in order to maximise statistical robustness, figures are presented as annual averages over 3 years. 2016 is the most recent year for which we have detailed data at this level of geography and so the profiles contain the most up-to-date information currently available. The profiles contain tables on domestic overnight, international overnight and domestic day visitors to Wales, occupancy rates, bedstock supply information as well as employment statistics covering the tourism sector, one of the Welsh Government's nine priority sectors

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1. Overview and Key Points



In 2014-2016, South East Wales accounted for 25 per cent of overnight domestic GB trips, 50 per cent of international visits and 38 per cent of Tourism Day visits to Wales.

The annual average volume of all tourism visitor trips (overnight domestic GB trips, international visits and Tourism Day visits) to South East Wales between 2013-2015 and 2014-2016 decreased by 3 per cent to 39,968 thousand, while related expenditure increased by 8 per cent to £2,132 million. In comparison, the volume of visitors for all Wales remained unchanged at 0 per cent, while related expenditure increased by 4 per cent to £5,639 million. *Please refer to [Table 1.0](#)*

Although the annual average volume of overnight domestic GB trips to all Wales decreased by 2 per cent between 2013-2015 and 2014-2016 to 9,919 thousand, the volume for South East Wales remained unchanged at 2,471 thousand. Furthermore, related expenditure over the same period for South East Wales increased by 1 per cent to

£421 million, while it remained unchanged for Wales as a whole, at £1,800 million. *Please refer to [Table 1.1](#)*

The annual average volume of international visits to South East Wales between 2013-2015 and 2014-2016 increased by 6 per cent to 497,000 visits. In addition, related expenditure in South East Wales increased by 2 per cent to £178 million. In comparison, the volume of international visits to all Wales increased by 7 per cent to 992,000 during the same period, while related expenditure increased by 8 per cent to £407 million. *Please refer to [Table 1.2](#)*

Between 2013-2015 and 2014-2016, the annual average volume of Tourism Day visits in South East Wales decreased by 3 per cent to 37 million, while related expenditure increased considerably by 11 per cent to £1,533 million. On the other hand, the volume of Tourism Day visits to Wales overall remained unchanged at 97 million, while related expenditure increased by 6 per cent to £3,432 million. *Please refer to [Table 1.3](#)*

Table 1.0 Volume of Expenditure (£ millions) by Three Year Averages for Overnight GB Domestic Trips, International Visits and Tourism Day Visits

Spend (£ millions)			
	2013-2015	2014-2016	% change
GB	107,125	108,118	+1
Wales	5,418	5,639	+4
North Wales	1,611	1,779	+10
Mid Wales	702	663	-6
South East Wales	1,971	2,132	+8
South West Wales	1,163	1,172	+1

Source: Great Britain Tourism Survey, Great Britain Day Visits Survey and the International Passenger Survey

Table 1.1 Volume of Overnight Domestic GB Trips (000s) and Related Expenditure (£ millions) - Three Year Averages

Trips (000s)			
	2013-2015	2014-2016	% change
GB	120,524	119,374	-1
Wales	10,127	9,919	-2
North Wales	3,713	3,626	-2
Mid Wales	1,763	1,750	-1
South East Wales	2,473	2,471	0
South West Wales	2,081	2,014	-3
Spend (£ millions)			
	2013-2015	2014-2016	% change
GB	23,603	23,532	0
Wales	1,802	1,800	0
North Wales	639	639	0
Mid Wales	309	311	+1
South East Wales	418	421	+1
South West Wales	386	387	0

Source: Great Britain Tourism Survey

Table 1.2 Volume of International Visits (000s) and Related Expenditure (£ millions) - Three Year Averages

Visits (000s)			
	2013-2015	2014-2016	% change
GB	34,397	36,037	+5
Wales	924	992	+7
North Wales	253	274	+8
Mid Wales	87	98	+14
South East Wales	467	497	+6
South West Wales	191	205	+7
Spend (£ millions)			
	2013-2015	2014-2016	% change
GB	21,583	22,027	+2
Wales	376	407	+8
North Wales	82	88	+7
Mid Wales	39	45	+14
South East Wales	175	178	+2
South West Wales	76	90	+19

Source: International Passenger Survey

Table 1.3 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) - Three Year Averages

Visits (millions)			
	2013-2015	2014-2016	% change
GB	1,801	1,803	0
Wales	97	97	0
North Wales	26	28	+5
Mid Wales	13	11	-13
South East Wales	38	37	-3
South West Wales	21	21	+3
Spend (£ millions)			
	2013-2015	2014-2016	% change
GB	61,938	62,560	+1
Wales	3,240	3,432	+6
North Wales	889	1,052	+18
Mid Wales	354	307	-13
South East Wales	1,379	1,533	+11
South West Wales	701	694	-1

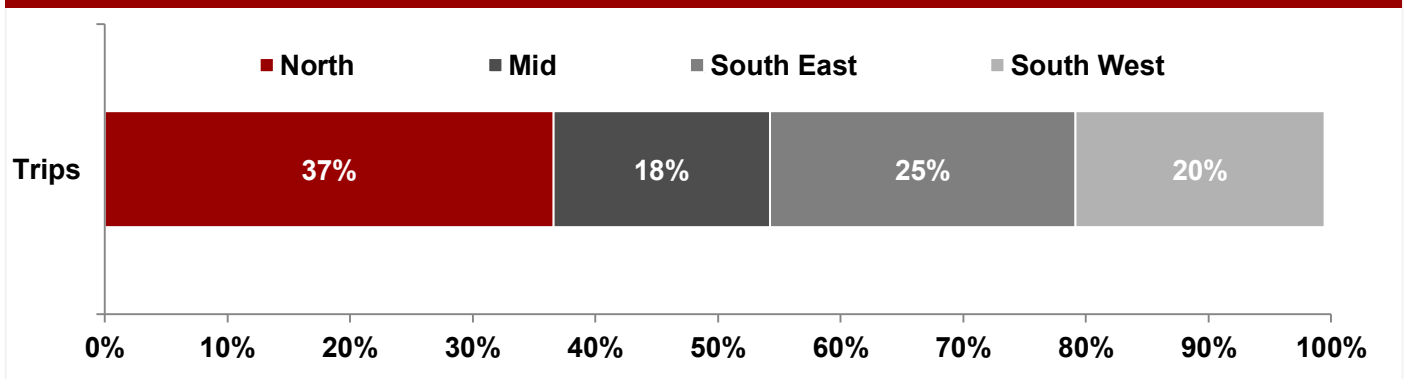
Source: Great Britain Day Visits Survey

2. Overnight Domestic GB Visitors

All the data used for this section has been sourced from the [Great Britain Tourism Survey](#). Figures shown are the averages taken over three years, 2014-2016, unless stated otherwise.

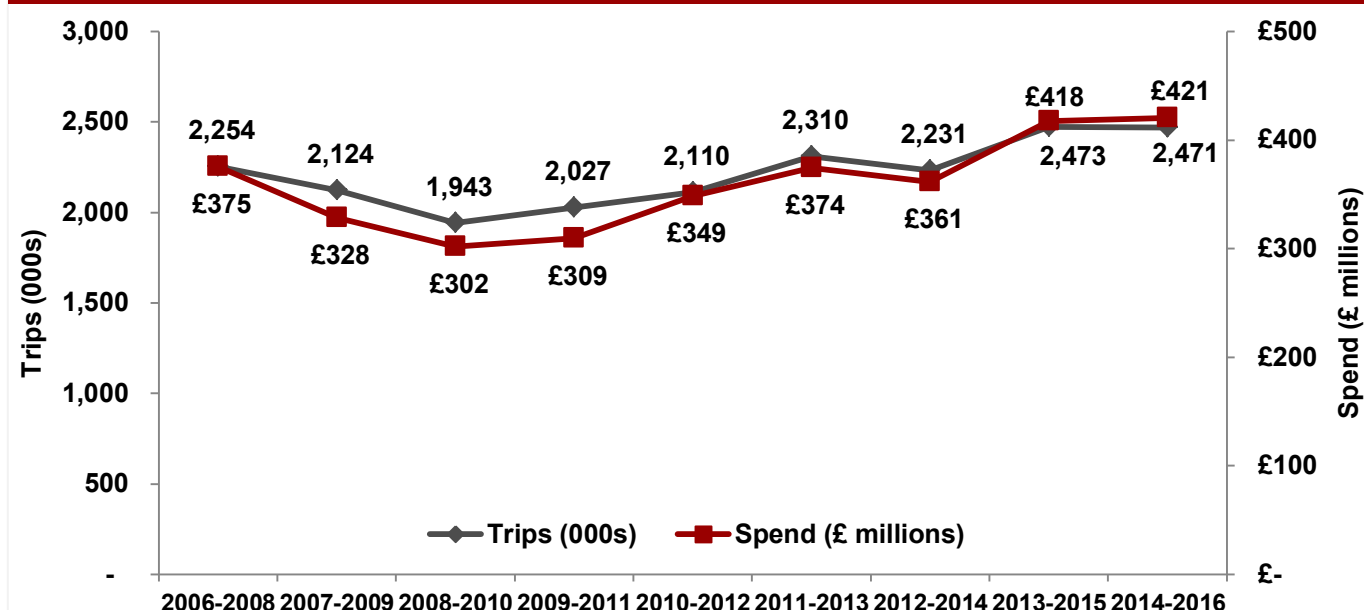
Over the period of 2014-2016, South East Wales received an annual average of 2,471,000 overnight domestic GB trips per year. Over the same period, these trips contributed £421 million per year to the Welsh economy. South East Wales received a quarter (25 per cent) of all overnight domestic GB trips to Wales making it the second most popular Welsh region for this kind of tourism.

Figure 1.0 Proportion (%) of Overnight Domestic GB Trips to Wales by Welsh Region – Annual Average 2014-2016



Volume of Trips and Related Expenditure

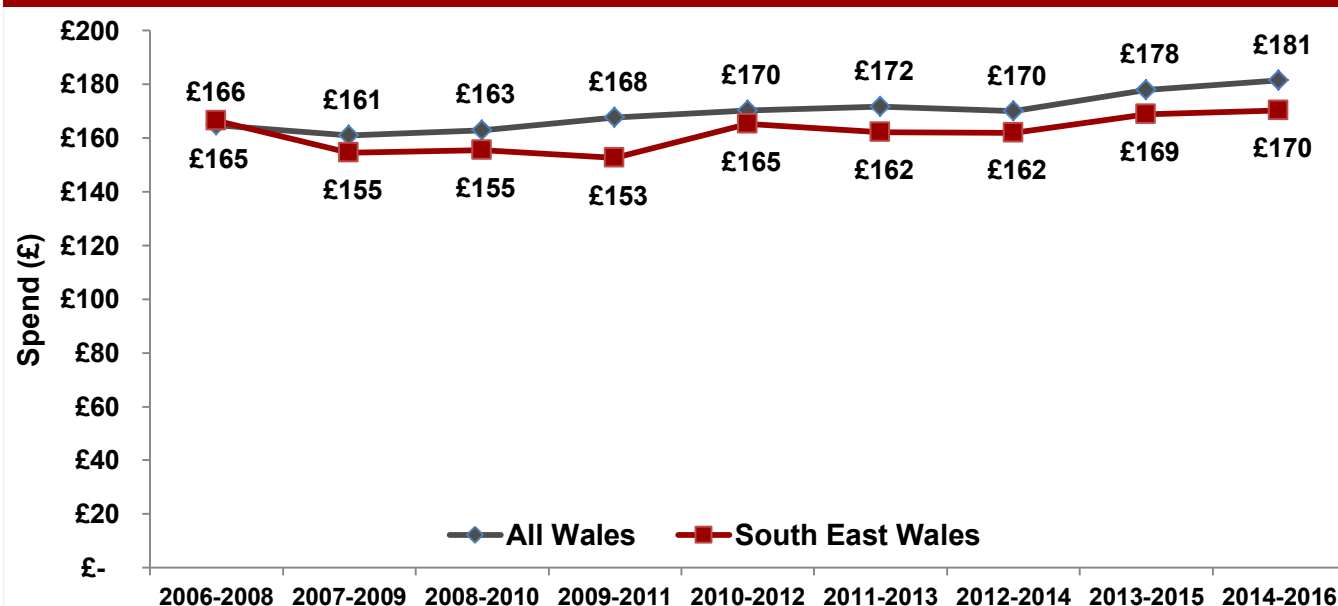
Figure 1.1 Overnight Domestic GB Trips (000s) and Related Expenditure (£ millions) to South East Wales - Three Year Annual Averages



Over time, the volumes of trips and related expenditure in South East Wales have tended to fall and increase in parallel. There were considerable increases in both the volume of trips and spend between 2012-2014 and 2014-2016. However, increases in the volume of overnight domestic GB trips and related expenditure between 2013-2015 and 2014-2016 were not as pronounced as previous years, from 2,473,000 to 2,471,000 trips and £418 million to £421 million.

Average Spend per Trip

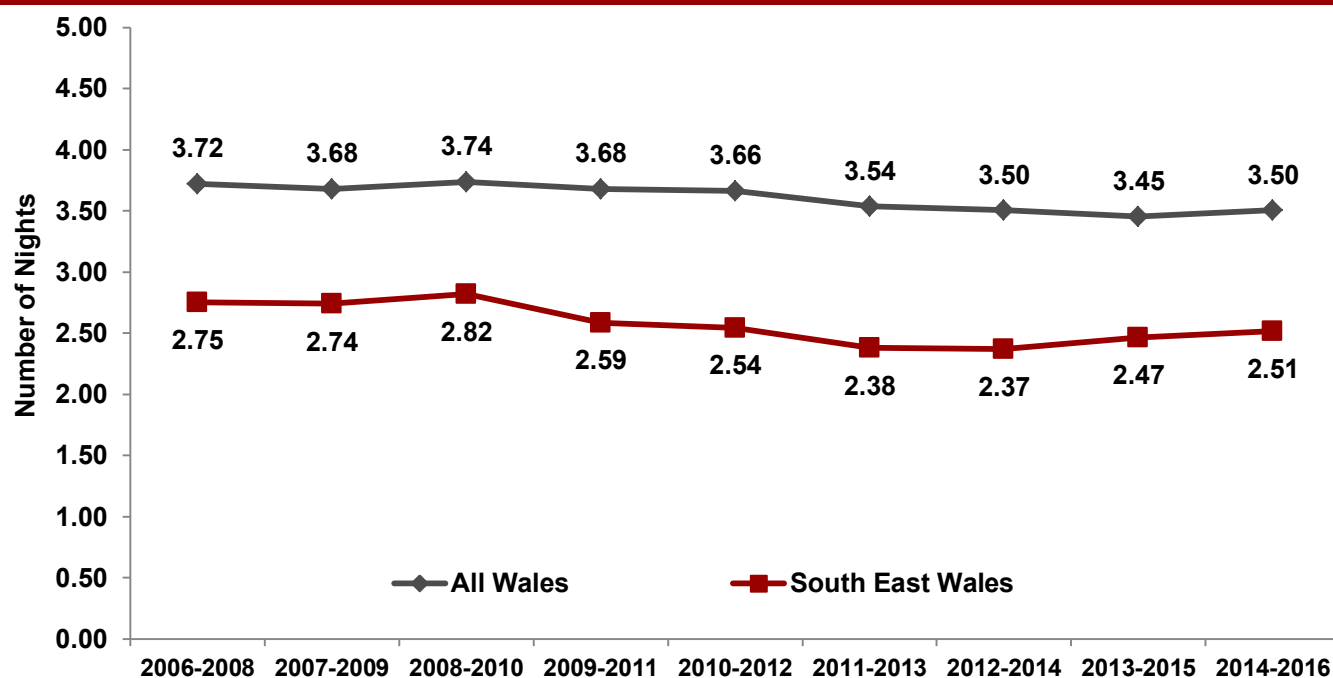
Figure 1.2 Average Spend per Overnight Domestic GB Trip (£) to Wales and South East Wales - Three Year Annual Averages



The average spend per overnight domestic GB trip to South East Wales in 2014-2016, at £170, is the highest it has been, but below the all Wales average of £181.

Average Number of Nights per Trip

Figure 1.3 Average Numbers of Nights per Overnight Domestic GB Trip to Wales and South East Wales – Three Year Annual Averages

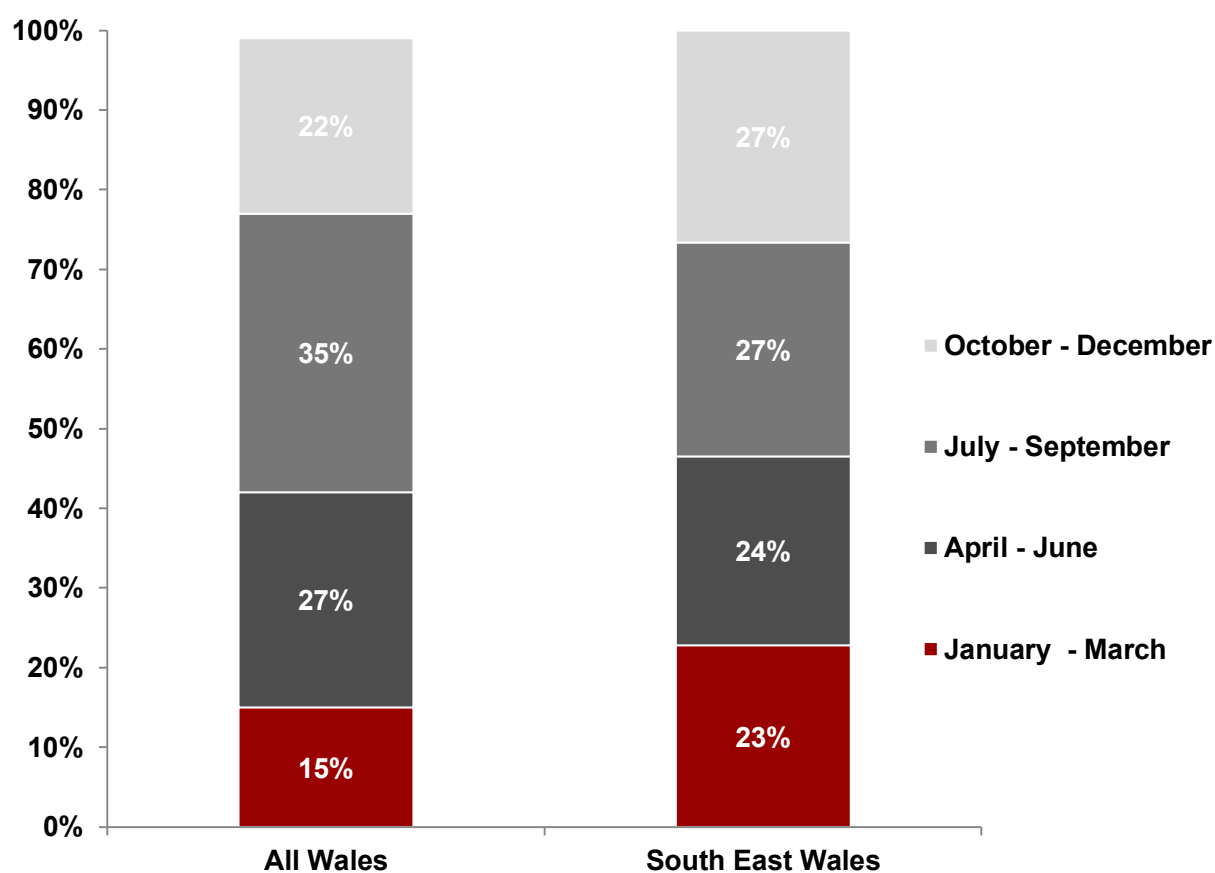


The average number of nights taken on a trip to South East Wales has consistently remained below the overall Wales average, with an average of 2.51 nights spent in South East Wales per trip in 2014-2016 compared to 3.50 for all Wales over the same period. Furthermore, South East Wales had the lowest average number of nights per overnight Domestic GB trip of all the Welsh regions.

Seasonality of Trips

South East Wales is the only Welsh region not to follow a typical high and low seasonal pattern, but shows similar proportions of visitors for each of the four quarters (see Figure 1.5). Compared to Wales overall, South East Wales had a considerably higher proportion of overnight domestic GB trips arriving between January and March (15 per cent and 23 per cent respectively). Furthermore, South East Wales had a higher proportion than all Wales for overnight domestic GB trips arriving in October-December (27 per cent and 22 per cent respectively).

Figure 1.4 Proportion (%) of Overnight Domestic GB Trips to All Wales and South East Wales by Season - Annual Average 2014-2016



Type of Accommodation used on Trip

Please note that overnight domestic GB visitors can stay in more than one type of accommodation during a single trip. Because of this, proportions of total trips by all accommodation types will always add up to +100 per cent. Furthermore, only the accommodation types with a large enough sample for analysis across all four Welsh regions have been included in this section.

The 2016 Great Britain Tourism Survey used different category names for accommodation types to those in 2014 and 2015. Please refer to [Table 3.9](#) for a full list categories that have been included under NET to calculate three-year averages.

Table 1.4 Volume of Overnight Domestic GB Trips (000s) by Type of Accommodation Used during a trip to Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Trips	9,919	2,471
Hotel/Motel (NET)	2,233	984
Guest house/Farmhouse/B&B (NET)	836	122
Self catering (NET)	1,169	91
Friend's home/Relative's home/Second home/Timeshare	2,938	1,089
Caravan and Camping (NET)	2,496	199

In 2014-2016 the most popular accommodation type used on an overnight domestic GB trip to South East Wales (44 per cent) and all Wales (30 per cent) was 'Friend's home/Relative's home/Second home/Timeshare'. In addition, South East Wales (40 per cent) had the highest proportion, of all the Welsh regions, for overnight domestic GB visitors staying in a 'Hotel/Motel (NET)', compared to 23 per cent for all Wales.

Figure 1.5 Proportion (%) of Overnight Domestic GB Trips to All Wales and South East Wales by Type of Accommodation - Annual Average 2014-2016

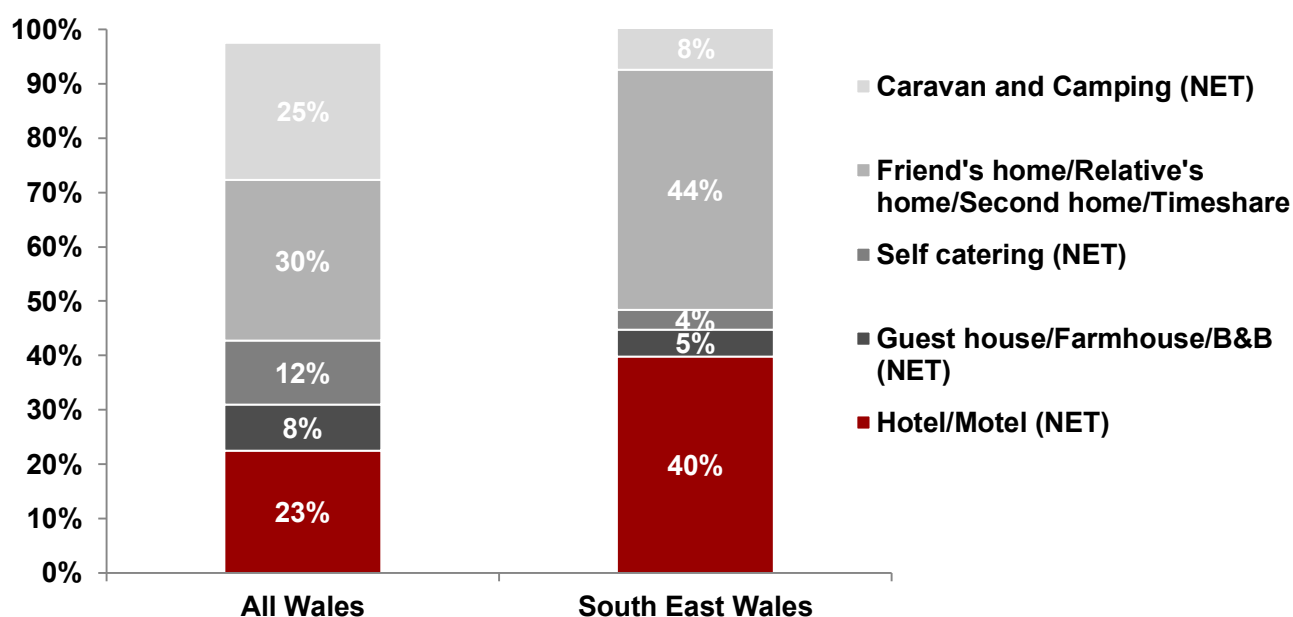


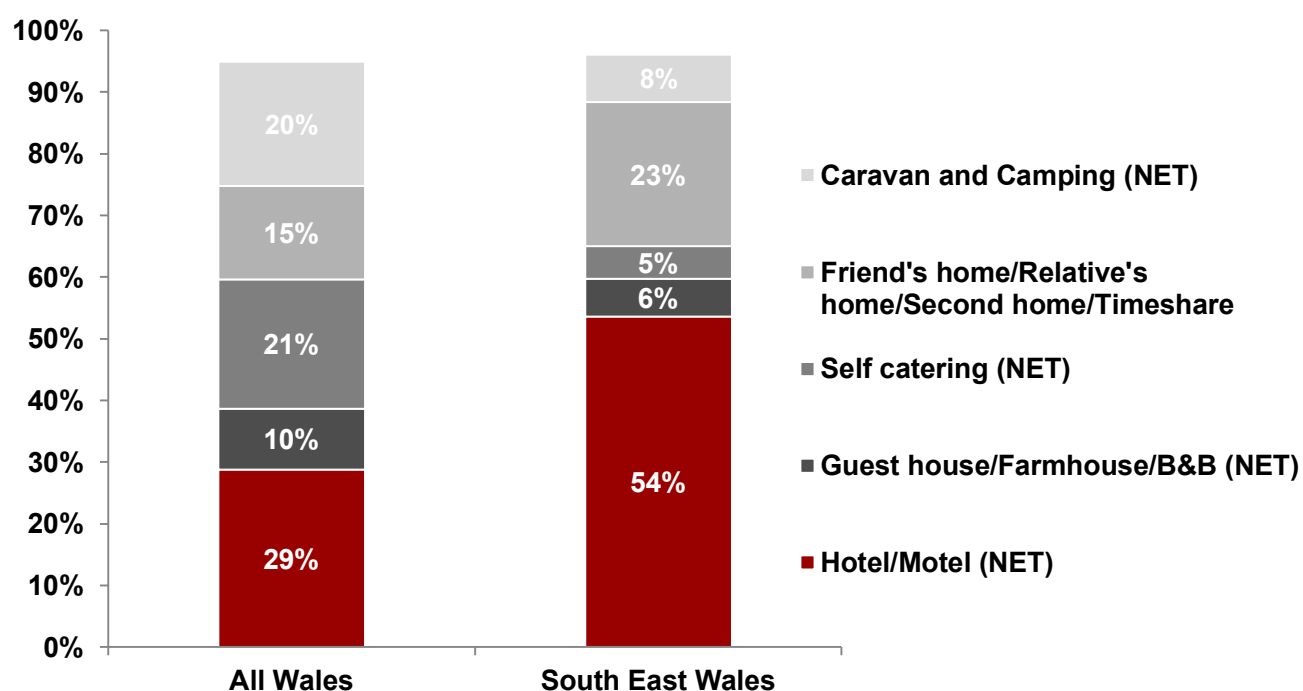
Table 1.5 Value of Related Expenditure (£ millions) from Overnight Domestic GB Trips by Type of Accommodation Used during a trip to Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Expenditure	1,800	421
Hotel/Motel (NET)	518	226
Guest house/Farmhouse/B&B (NET)	178	26
Self catering (NET)	376	22
Friend's home/Relative's home/Second home/Timeshare	272	99
Caravan and Camping (NET)	362	32

Even though 'Friend's home/Relative's home/Second home/Timeshare' had the highest allocation of volume of overnight domestic GB trips to South East Wales (44 per cent) and all Wales (30 per cent), it contributed to a smaller share of related expenditure. For example, although in South East Wales 'Friend's home/Relative's home/Second home/Timeshare' included 44 per cent (1,089,000) of volume of overnight domestic GB trips, it generated 23 per cent (£99 million) of all related expenditure to the region. This is not surprising, as this type of accommodation does not tend to involve a high cost as it is the visitor's family and friends.

In both South East Wales and all Wales, 'Hotel/Motel (NET)' contributed to a higher proportion of related expenditure than volume of trips. For example in South East Wales, 'Hotel/Motel (NET)' was responsible for 40 per cent of trips (984,000) but contributed to 54 per cent (£226 million) of all expenditure.

Figure 1.6 Proportion (%) of Related Expenditure of Overnight Domestic GB Trips to All Wales and South East Wales by Type of Accommodation - Annual Average 2014-2016



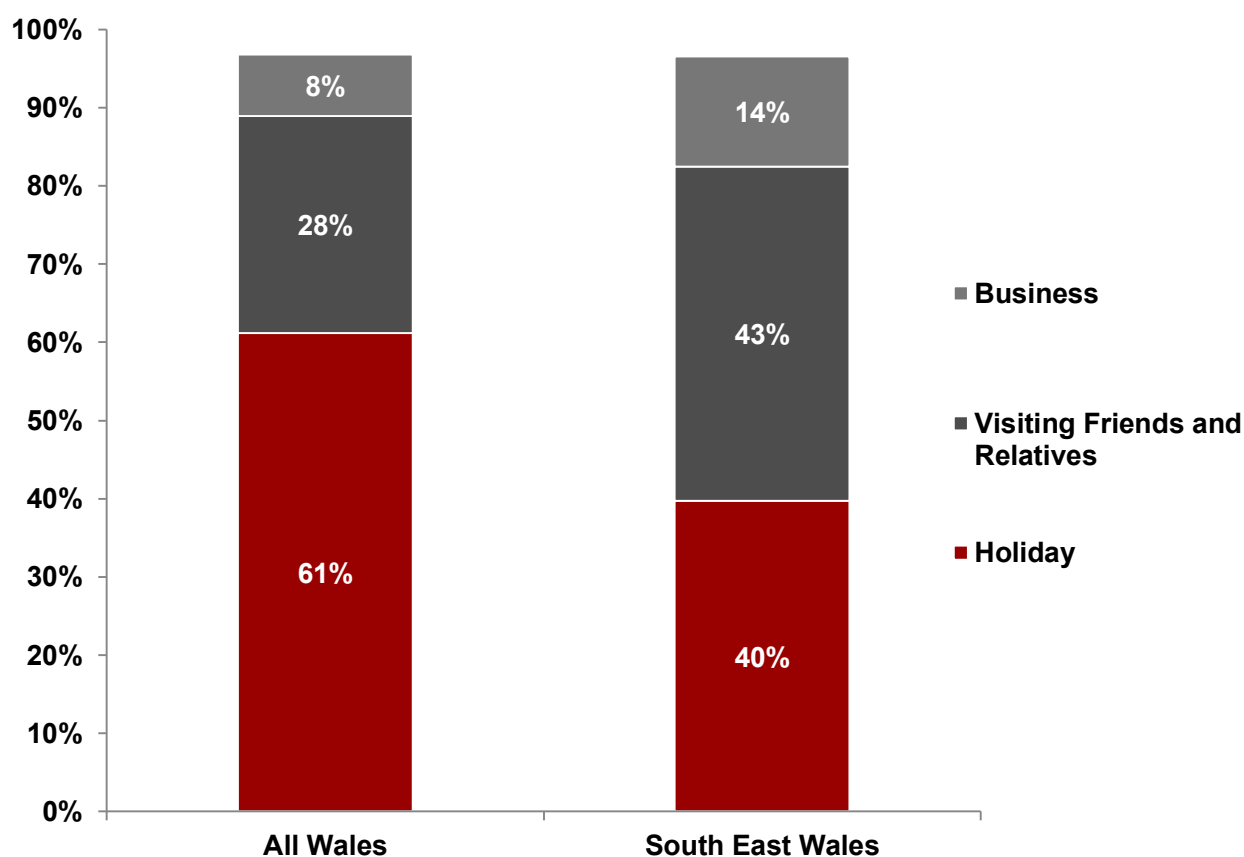
Purpose of Trip

Table 1.6 Volume of Overnight Domestic GB Trips (000s) by Purpose of Trip to All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Trips	9,919	2,471
Holiday	6,065	982
Visiting Friends and Relatives	2,755	1,056
Business	779	348

During 2014-2016, South East Wales had the highest proportion of overnight domestic GB trips with the purpose of visiting friends and relatives (43 per cent), where the average for Wales overall was 28 per cent. South East Wales had nearly double the proportion of overnight domestic GB business trips than was the case for all Wales (14 per cent and 8 per cent respectively). In contrast, over the same period, South East Wales had the lowest proportion of overnight domestic GB holiday trips (40 per cent) compared to the overall Wales average of 61 per cent.

Figure 1.7 Proportion (%) of Overnight Domestic GB Trips to All Wales and South East Wales by Purpose of Trip – Annual Average 2014-2016



**Please note that the figures might not add to 100 per cent due to survey participants not answering this question or selecting a 'Don't Know'/'Other'.*

Type of Place Visited

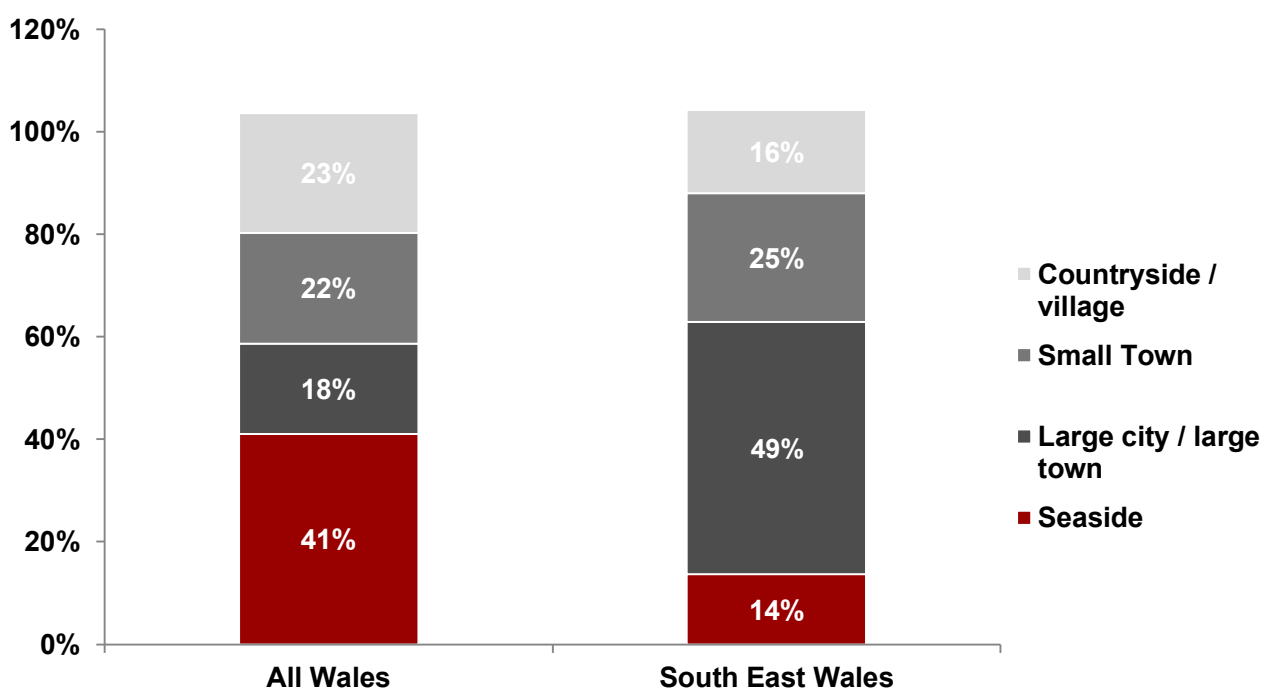
Table 1.7 Volume of Overnight Domestic GB Trips (000s) by Type of Place Visited to All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Trips	9,919	2,471
Seaside	4,076	338
Large city / large town	1,747	1,216
Small town	2,143	622
Countryside / village	2,320	401

During 2014-2016, the most popular destination for overnight domestic GB trips to South East Wales was a large town or city (49 per cent), while the least popular destination was the seaside (14 per cent). Compared to all Wales, South East Wales had a considerably higher proportion of overnight domestic GB visitors to a large city/large town (18 per cent and 49 per cent respectively). On the other hand, all Wales compared to South East Wales, had a much higher proportion of overnight domestic GB trips to the seaside (41 per cent and 14 per cent respectively).

It is important to bear in mind that respondents themselves choose how they classify the place they visit and responses are therefore subjective. For example someone might classify their location as a 'village' and not a 'small town'.

Figure 1.8 Proportion (%) of Overnight Domestic GB Trips by Type of Place Visited to All Wales and South East Wales – Annual Average 2014-2016



**Please note that the figures might add up to over 100 per cent due to visitors being able to visit more than one Type of Place.*

Lifestage

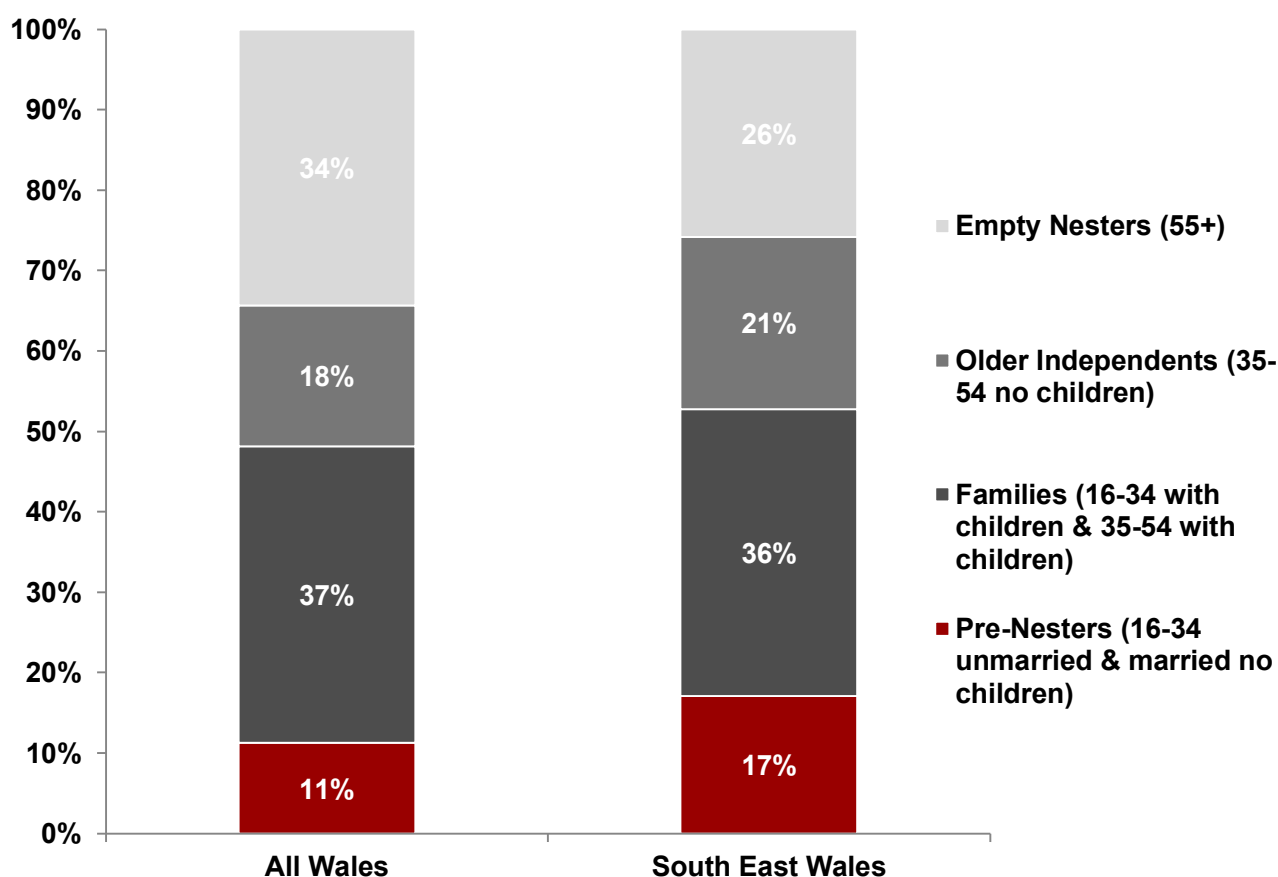
Table 1.8 Volume of Overnight Domestic GB Holiday Trips (thousands) by Lifestage to All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Holiday Trips	6,065	982
Pre-Nesters (16-34 unmarried & married no children)	685	168
Families (16-34 with children & 35-54 with children)	2,234	351
Older Independents (35-54 no children)	1,063	210
Empty Nesters (55+)	2,083	253

During 2014-2016, South East Wales had a higher proportion of pre-nesters (17 per cent) taking overnight domestic GB holiday trips to the region than was the case for Wales overall (11 per cent). Furthermore, South East Wales had the lowest proportion of empty nesters visiting (26 per cent) when compared to the other Welsh regions and the overall Wales average (34 per cent).

The majority of overnight domestic GB holiday trips taken in South East Wales were made by families (36 per cent). In addition, older independents made up just over a fifth (21 per cent) of overnight domestic GB holiday trips.

Figure 1.9 Proportion (%) of Overnight Domestic GB Holiday Trips by Lifestage to All Wales and South East Wales – Annual Average 2014-2016



Region of Origin

Table 1.9 Volume of Overnight Domestic GB Trips (000s) by Region of Origin to All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Trips	9,919	2,471
Scotland	101	30
Wales	2,048	503
England	7,766	1,939
North East England	161	40
North West England	1,885	138
Yorkshire and the Humber	499	153
East Midlands	537	169
West Midlands	1,716	227
East of England	369	105
London	611	255
South East England	909	380
South West England	1,079	471

Just over three quarters (78 per cent) of overnight domestic GB trips to South East Wales were from England, the same proportion as the all Wales average. Nearly one fifth (19 per cent) of overnight domestic GB trips from England to South East Wales originated from South West England.

Table 2.0 Proportion (%) of Overnight Domestic GB Trips by Region of Origin to All Wales and South East Wales – Annual Average 2014-2016

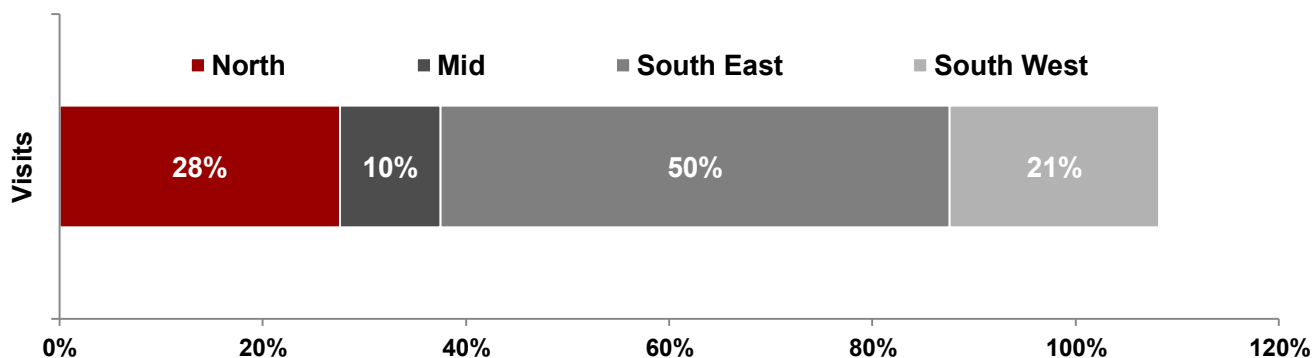
	All Wales	South East Wales
Total Trips	100%	100%
Scotland	1%	1%
Wales	21%	20%
England	78%	78%
North East England	2%	2%
North West England	19%	6%
Yorkshire and the Humber	5%	6%
East Midlands	5%	7%
West Midlands	17%	9%
East of England	4%	4%
London	6%	10%
South East England	9%	15%
South West England	11%	19%

3. International Visitors

All the data used for this section has been sourced from the [International Passenger Survey](#). Figures shown are the averages taken over a period of three years, 2014-2016, unless stated otherwise.

During 2014-2016, there was an annual average of 497,000 international visits to South East Wales, which contributed to an average expenditure of £178 million per year. Half (50 per cent) of all international visitors to Wales visited the South East region, making it the most popular Welsh region for international travellers.

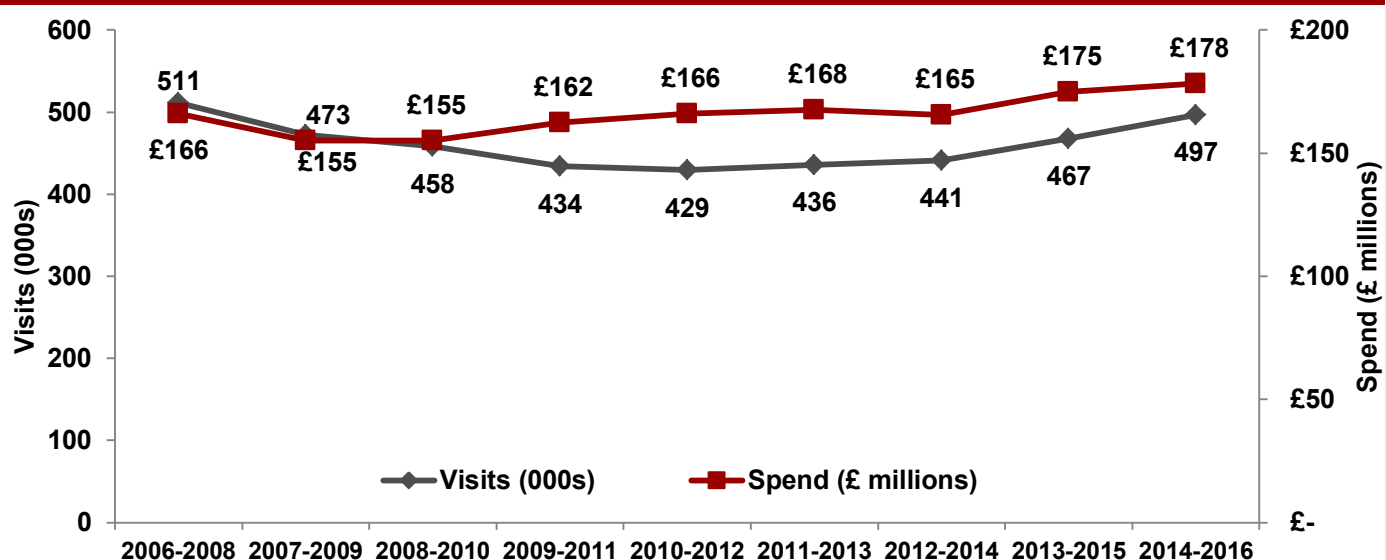
Figure 2.0 Proportion (%) of International Visits to Wales by Welsh Region – Annual Average 2014-2016



**Please note that the figures might add up to over 100 per cent due to visitors being able to visit more than one region.*

Volume of Visits and Related Expenditure

Figure 2.1 Volume of International Visits (000s) and Related Expenditure (£ millions) to South East Wales - Three Year Annual Averages

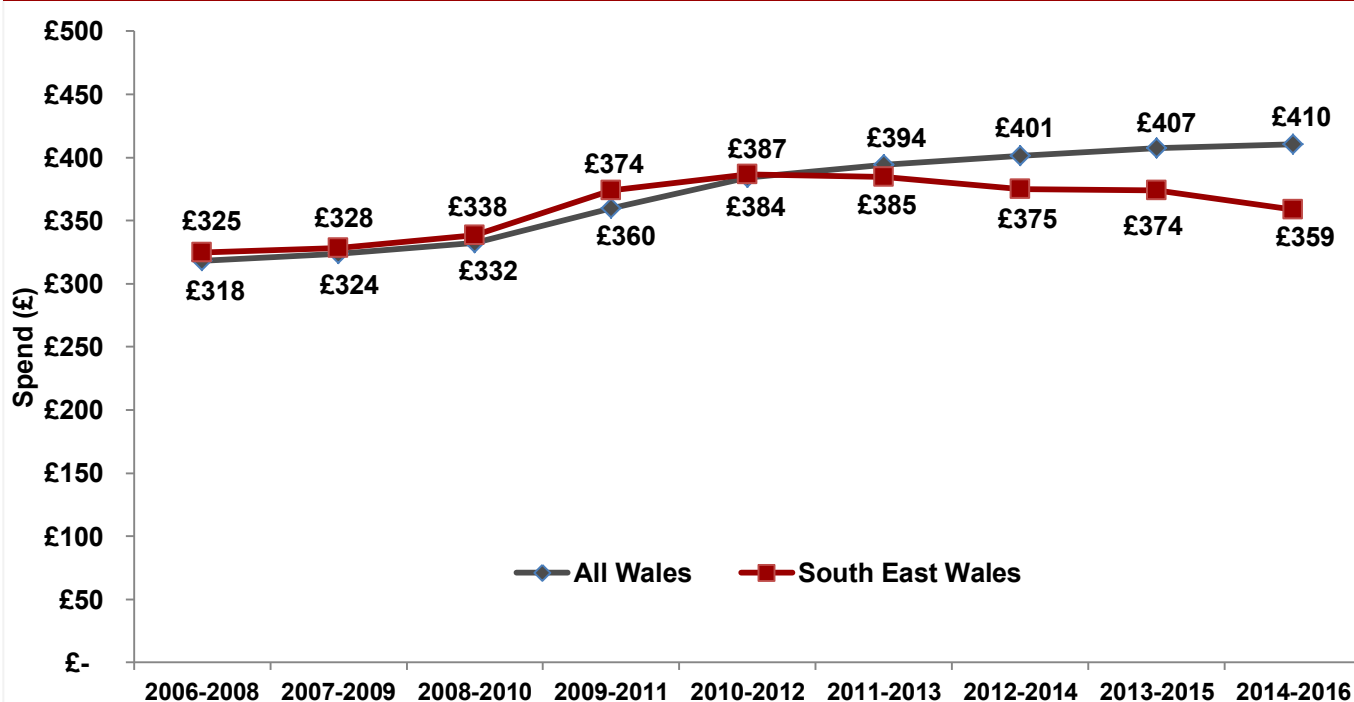


From 2010-2012 the annual average volume of international visits to South East Wales steadily increased, reaching 497,000 in 2014-2016, the highest volume since 2007-2009.

On the other hand, related expenditure fluctuated slightly between 2010-2012 and 2012-2014, but continued to increase in the following years. Expenditure peaked in 2014-2016 at £178 million.

Average Spend per Visit

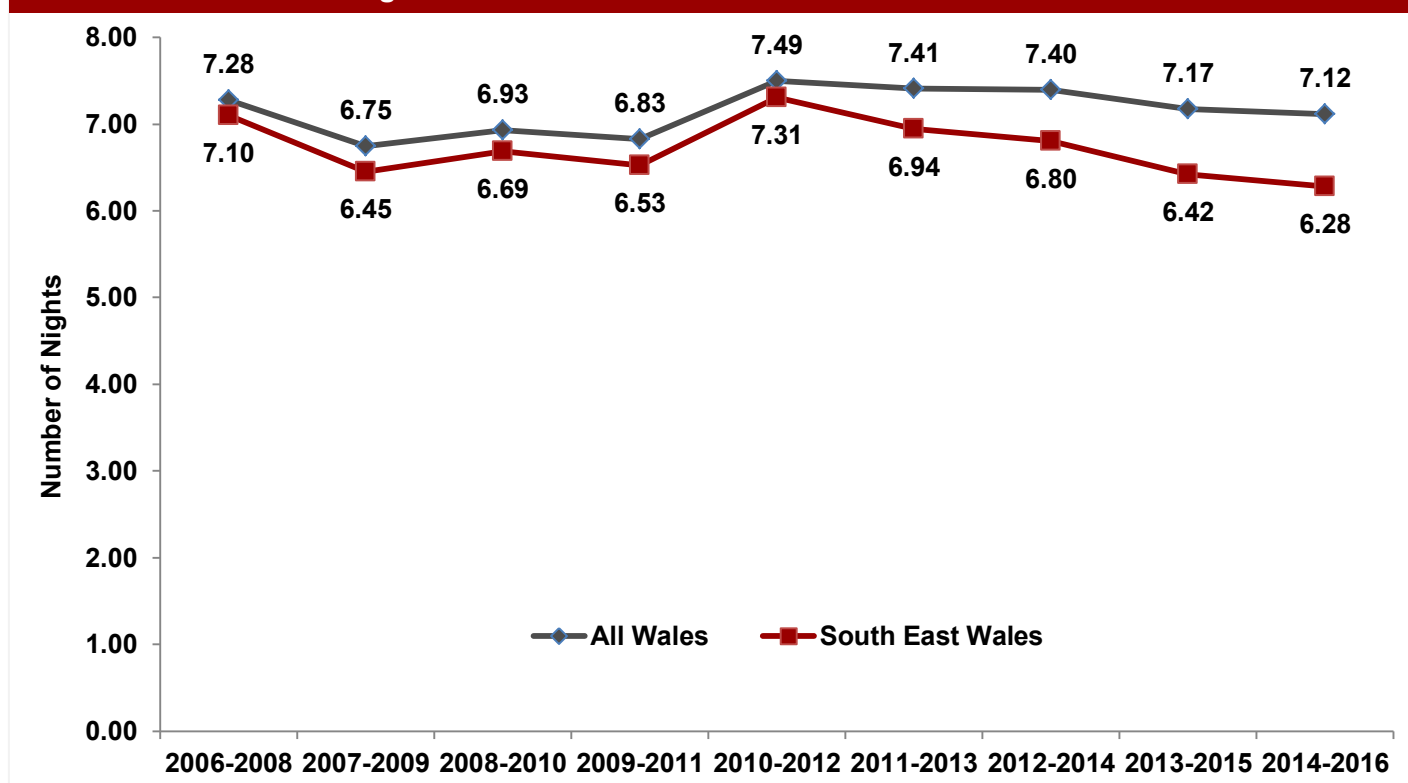
Figure 2.2 Average Spend per International Visit (£) to All Wales and South East Wales – Three Year Annual Averages



Between 2006-2008 and 2011-2013 the average spend per international visit for all Wales and South East Wales remained very similar. Nonetheless, in recent years the average spend per international visit in South East Wales has shown a tendency to fall below the all Wales average. For example in 2014-2016 the average spend per international visit in South East Wales was £359, while the all Wales average was £410.

Average Number of Nights per Visit

Figure 2.3 Average Number of Nights per International Visit to Wales and South East Wales - Three Year Annual Averages



Similar to average spend per international visit, the average number of nights per visit for all Wales and South East Wales between 2006-2008 and 2010-2012 remained similar to each other, whereas between 2011-2013 and 2014-2016 the difference is more pronounced, with South East Wales falling below the all Wales average.

In 2014-2016 the average number of nights per international visit to all Wales was 7.12, while for South East Wales it was 6.28.

Purpose of Trip

Table 2.1 Volume of International Visits (thousands) by Purpose of Trip to All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Trips	992	497
Holiday	407	182
Business	178	110
Visiting Friends and Relatives	327	159
Other	63	39
Study	17	7

During 2014-2016, only 37 per cent of international visitors to South East Wales came for a holiday. Over the same period, a similar proportion, 32 per cent came to visit friends and relatives.

Compared to all Wales, South East Wales had a smaller proportion of holiday visitors (41 per cent and 37 per cent respectively) but a higher proportion of business visitors (18 per cent and 22 per cent respectively).

Figure 2.4 Proportion (%) of International Visits to All Wales and South East Wales by Purpose of Trip – Annual Average 2014-2016

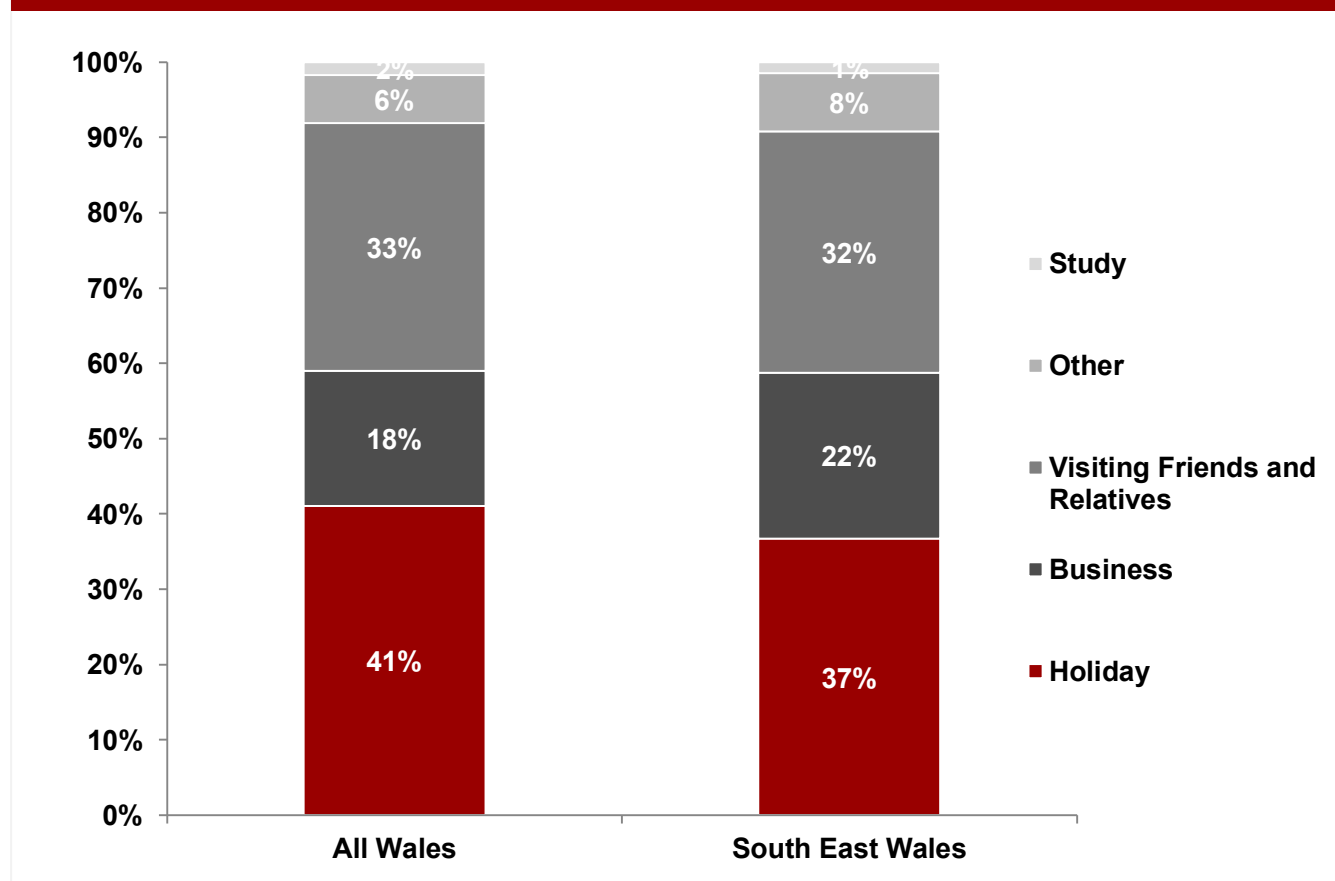
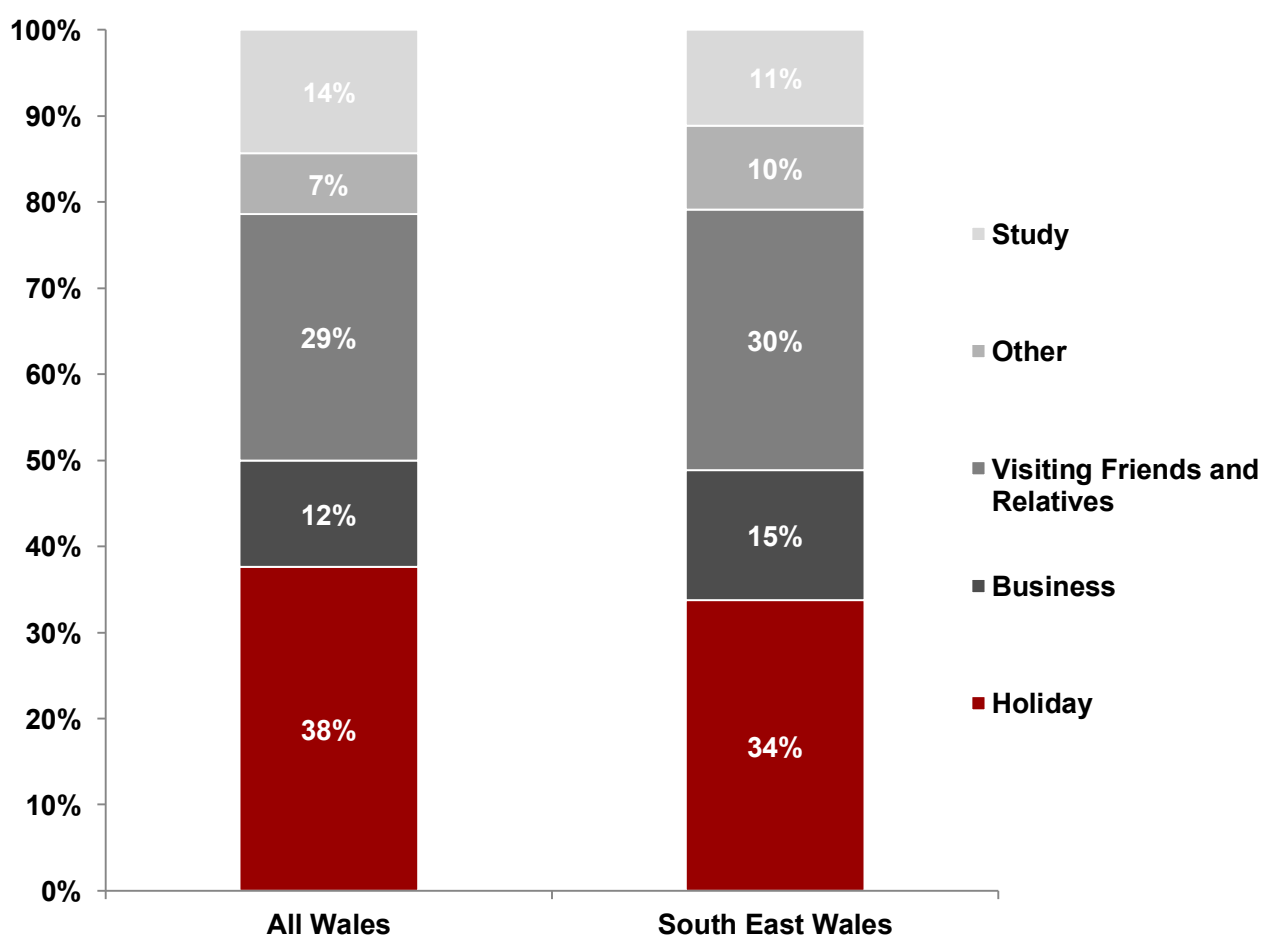


Table 2.2 Related Expenditure (£ millions) of International Visits by Purpose of Trip to All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Expenditure	407	178
Holiday	153	60
Business	50	27
Visiting Friends and Relatives	117	54
Other	29	17
Study	58	20

In 2014-2016, international visitors coming to South East Wales to study contributed to £20 million of all tourism related expenditure to the region. As seen for all Wales and all four Welsh regions, international visitors coming to study are responsible for a larger proportion of related expenditure than just the volume of international visits would suggest. For example, in 2014-2016 the proportion of international visitors arriving to study in South East Wales accounted for only 1 per cent of the total but they contributed to 11 per cent of all related expenditure in South East Wales.

Figure 2.5 Proportion (%) of Related Expenditure of International Visits to All Wales and South East Wales by Purpose of Trip – Annual Average 2014-2016



Country of Origin

Please note that tables 2.3 and 2.4 show only the top ten countries of origin of international visitors by volume of visits to South East Wales and all Wales.

Table 2.3 Top 10 Countries of Origin of International Visits by Volume of Visits (000s) to All Wales and South East Wales – Annual Average 2014-2016

All Wales		South East Wales	
All Visits	992	All Visits	482
Ireland	148	France	57
France	103	USA	48
Germany	94	Ireland	45
USA	89	Germany	38
Australia	66	Australia	35
Netherlands	64	Spain	32
Spain	55	Netherlands	30
Poland	49	Poland	19
Canada	31	Italy	17
Italy	30	Belgium	16

The most common country of origin for international visitors to South East Wales was France (12 per cent), followed by USA (10 per cent) and Ireland (9 per cent).

In comparison to Wales overall, South East Wales had a smaller proportion of Irish visitors (15 per cent and 9 per cent respectively). Furthermore, Belgium (3 per cent) was listed in the top ten country of origin list for international visits to South East Wales but not for all Wales, whereas Canada (3 per cent) was listed in the top ten for all Wales but not for South East Wales.

Table 2.4 Proportion (%) of International Visits by Top 10 Countries of Origin to All Wales and South East Wales – Annual Average 2014-2016

All Wales		South East Wales	
All Visits	100%	All Visits	100%
Ireland	15%	France	12%
France	10%	USA	10%
Germany	9%	Ireland	9%
USA	9%	Germany	8%
Australia	7%	Australia	7%
Netherlands	6%	Spain	7%
Spain	6%	Netherlands	6%
Poland	5%	Poland	4%
Canada	3%	Italy	3%
Italy	3%	Belgium	3%

Local Authorities Visited

The most visited local authority in South East Wales by international visitors in 2014-2016 was Cardiff with 340,000 visits. Furthermore, Cardiff was the most visited local authority in all Wales, likely due to the main international airport in Wales being located in this area.

Table 2.5 Volume of International Visits to each Local Authority in South East Wales – Annual Average 2014-2016

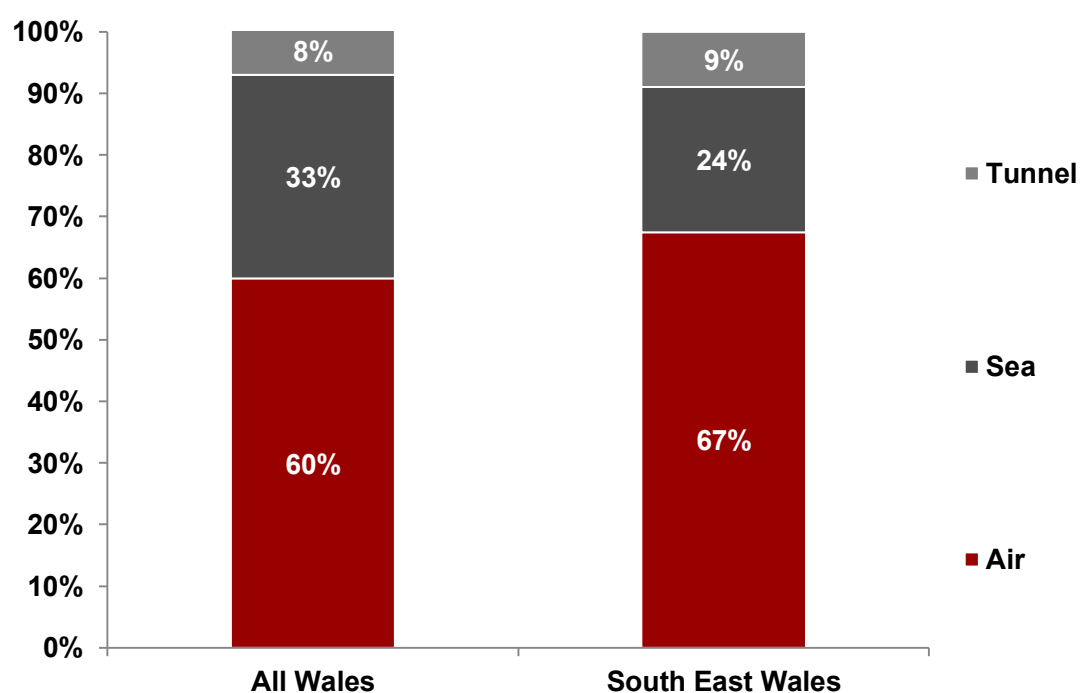
	Visits
Cardiff	340,000
Newport	57,000
Monmouthshire	38,000
Bridgend	22,000
(The) Vale of Glamorgan	15,000
Caerphilly	15,000
Rhondda Cynon Taf	13,000
Torfaen	7,000
Merthyr Tydfil	3,000
Blaenau Gwent	3,000

Mode of Transport Used

International visitors are more likely to arrive to South East Wales by air (67 per cent) than is the case for any other Welsh region. This is to be expected as the main airport in Wales is located in Cardiff.

Compared to all Wales, South East Wales had a smaller proportion of international visits choosing to travel by sea (33 per cent and 24 per cent respectively).

Figure 2.6 Proportion (%) of International Visits to All Wales and South East Wales by Mode of Transport Used – Annual Average 2014-2016



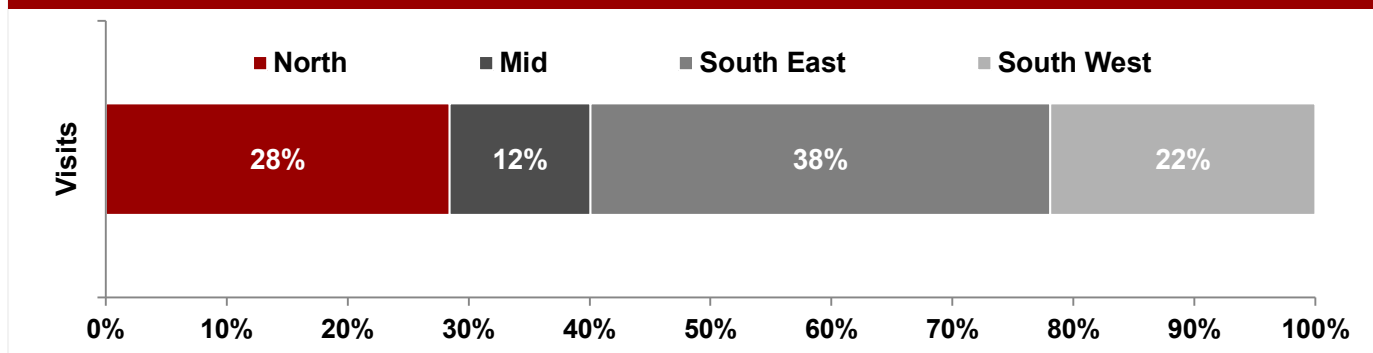
4. Tourism Day Visits

All the data in this section has been sourced from the [Great Britain Day Visits Survey](#). There are three types of day visits: '3 Hour+ Leisure Day Visits', 'Tourism Day Visits' and 'Activities Core to Tourism Visits'. This section will only cover figures for Tourism Day Visits. Figures shown, unless otherwise stated, are the averages taken over three years: 2014-2016.

Please note that since 2016 there have been several revisions to the way this survey has been carried out which has affected the comparability of 2011-2015 figures with those from 2016 onwards. To remedy this, figures pre-2016 have been reweighted by +15 per cent in order to be able to compare them. Thus some of the Tourism Day visits figures below might not match those previously provided.

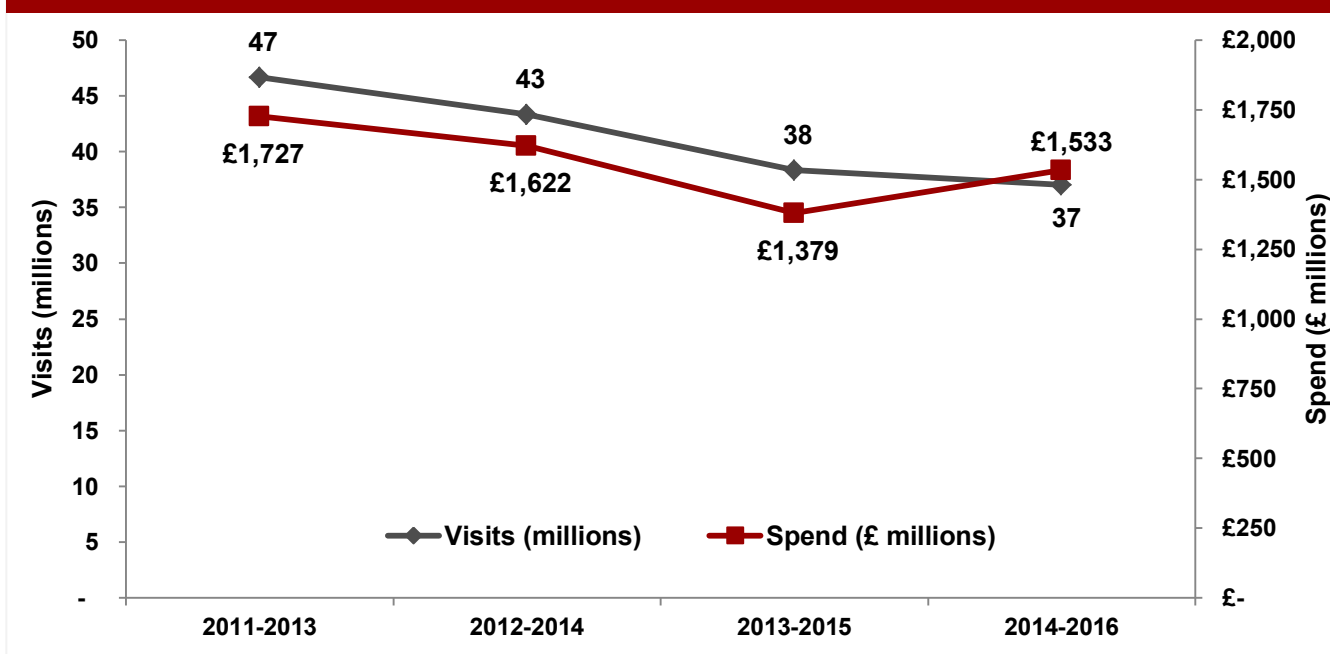
During 2014-2016, South East Wales received an annual average of 37 million Tourism Day visits with a related expenditure of £1,533 million per year. Furthermore, South East Wales received 38 per cent of all Tourism Day visits to Wales.

Figure 2.7 Proportion (%) of Tourism Day Visits to each Welsh Region – Annual Average 2014-2016



Tourism Day Visits and Related Expenditure

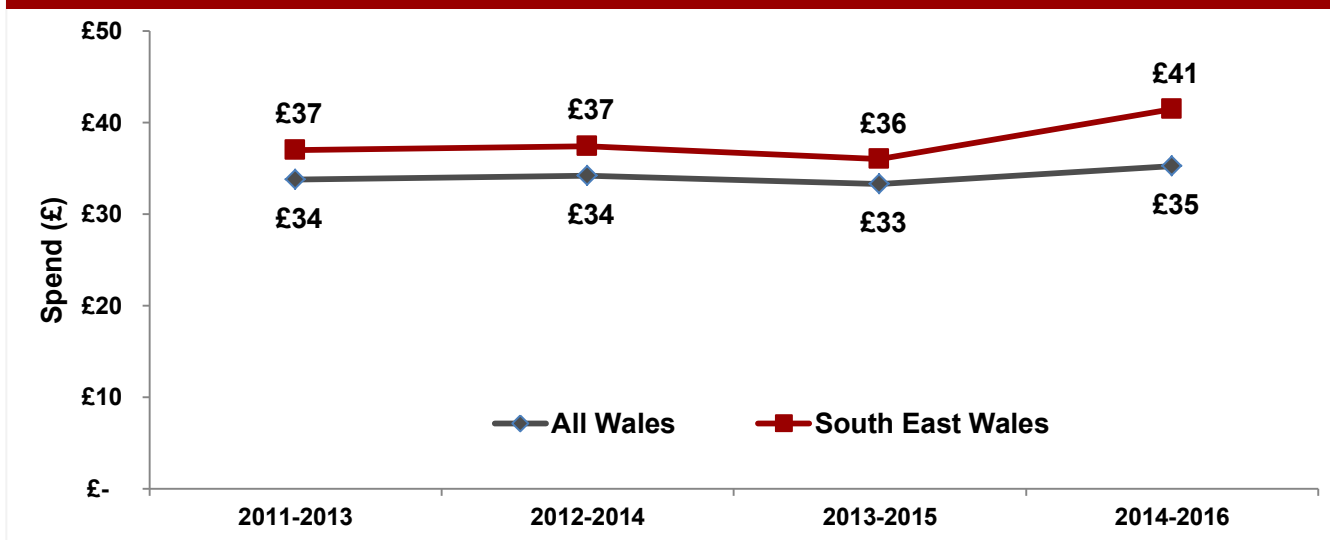
Figure 2.8 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) to South East Wales - Three Year Annual Averages



Since 2011-2013, the volume of Tourism Day visits to South East Wales has steadily decreased, reaching 37 million in 2014-2016. Although spend decreased periodically between 2011-2013 and 2013-2015, it increased considerably in 2014-2016 to £1,533 million.

Average Spend per Visit

Figure 2.9 Average Spend per Tourism Day Visit (£) to All Wales and South East Wales - Three Year Annual Averages



The average spend per Tourism Day visit in South East Wales has continuously remained above the all Wales average, reaching £41 in 2014-2016. For comparison, the all Wales average for the same period was £35.

Activities Undertaken

Table 2.6 Volume of Tourism Day Visits (millions) and Proportion (%) of activities undertaken during a Tourism Day Visit to All Wales and South East Wales – Annual Average 2014-2016

All Wales			South East Wales		
All Visits	97.3	100%	All Visits	37.0	100%
Visiting friends or family	19.8	20%	Visiting friends or family	9.1	25%
Going out for a meal	10.5	11%	Going out for a meal	4.6	12%
Outdoor activities	9.1	9%	Outdoor activities	3.2	9%
General day out	7.1	7%	General day out	2.5	7%
Going on a night out	6.9	7%	Going on a night out	2.9	8%
Special shopping	6.2	6%	Special shopping	3.5	10%
Going out for entertainment	4.7	5%	Going out for entertainment	2.5	7%
Watching live sporting events	3.6	4%	Watching live sporting events	2.0	6%
Taking part in sports	3.4	3%	Taking part in sports	0.5	1%
Other day out for leisure	3.3	3%	Other day out for leisure	1.3	3%
Going to visitor attractions	3.3	3%	Going to visitor attractions	1.4	4%
Other leisure/ hobbies	2.9	3%	Other leisure/ hobbies	1.1	3%
Special personal events	2.5	3%	Special personal events	1.2	3%
Special public events	1.9	2%	Special public events	1.0	3%
Day out to health/beauty spa	0.7	1%	Day out to health/beauty spa	0.1	0%

A quarter (25 per cent) of Tourism Day visitors to South East Wales, some 9.1 million, visited friends or family in 2014-2016, making it the most popular activity undertaken on a Tourism Day visit to this region, a higher proportion than the all Wales average of 20 per cent.

In addition, a higher proportion of Tourism Day visitors to all South East Wales than all Wales undertook special shopping in 2014-2016 (10 per cent and 6 per cent respectively).

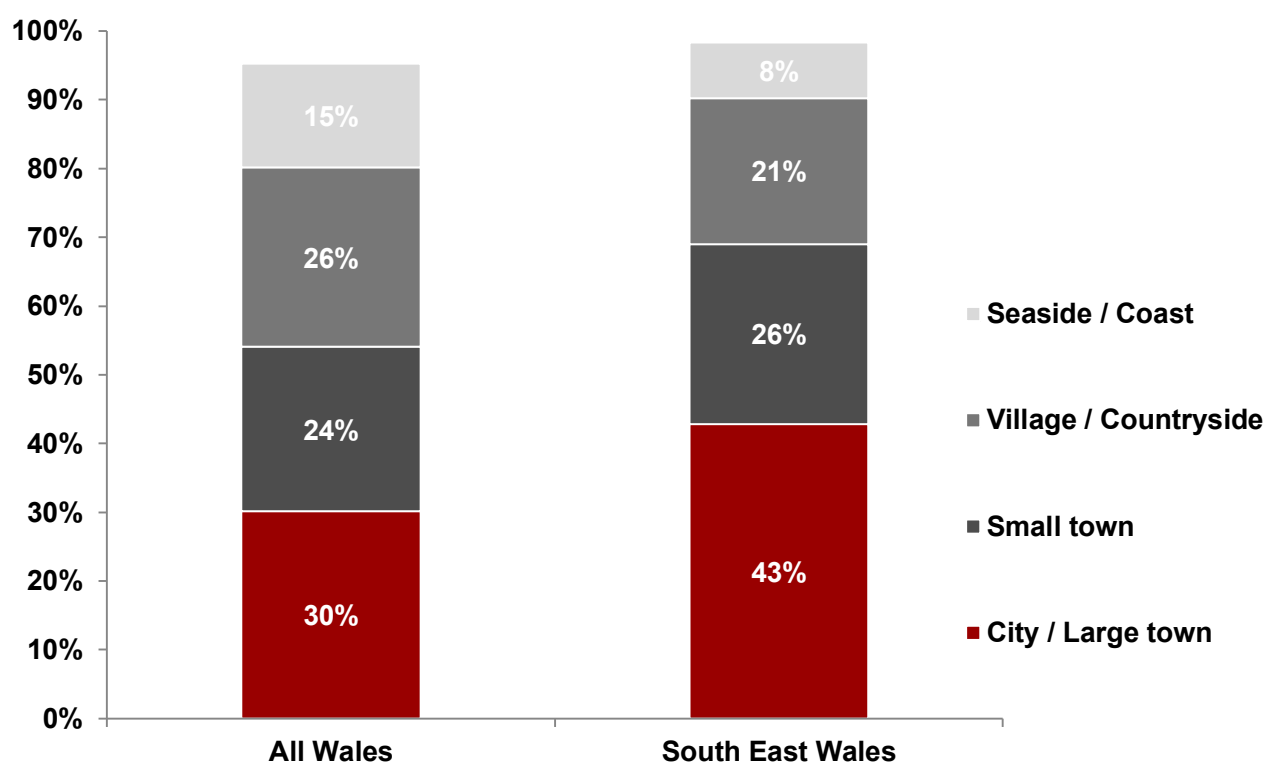
Table 2.7 Volume of Tourism Day Visits (millions) by Type of Place Visited to All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Visits	97	37
City / Large town	29	16
Small town	23	10
Village / Countryside	25	8
Seaside / Coast	15	3

In South East Wales, unsurprisingly, the type of place most visited on a Tourism Day visit was a city/large town, with over two fifths (43 per cent, 16 million) of Tourism Day visitors choosing this place, which is considerably higher than the all Wales average of 30 per cent.

Compared to all Wales, South East Wales had a smaller proportion of Tourism Day visits to the seaside/coast (15 per cent and 8 per cent respectively).

Figure 3.0 Proportion (%) of Tourism Day Visits to All Wales and South East Wales by Type of Place Visited - Annual Average 2014-2016



**Please note that the figures might not add to 100 per cent due to survey participants not answering this question or selecting 'Don't Know'/'Other'.*

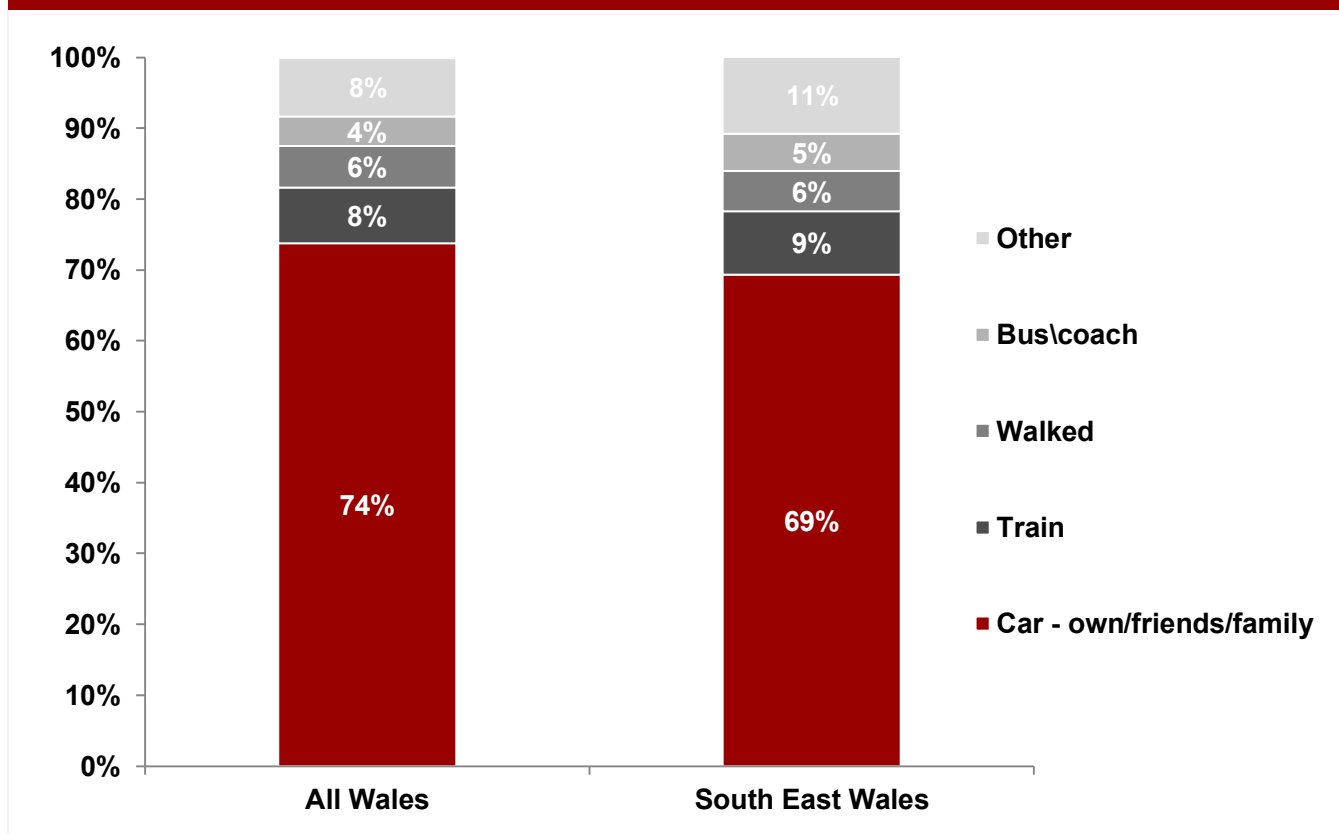
Mode of Transport Used

Table 2.8 Volume of Tourism Day Visits (millions) by Mode of Transport to All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Visits	97	37
Car - own/friends/family	72	26
Train	8	3
Walked	6	2
Bus\coach	4	2
Other	8	4

Like for all the other regions in Wales, the car was the most preferred mode of transportation in South East Wales in 2014-2016, with the majority (69 per cent) of Tourism Day visitors choosing to travel this way, which was slightly lower than the all Wales average of 74 per cent.

Figure 3.1 Proportion (%) of Tourism Day Visits to All Wales and South East Wales by Mode of Transport Used - Annual Average 2014-2016



Distance Travelled

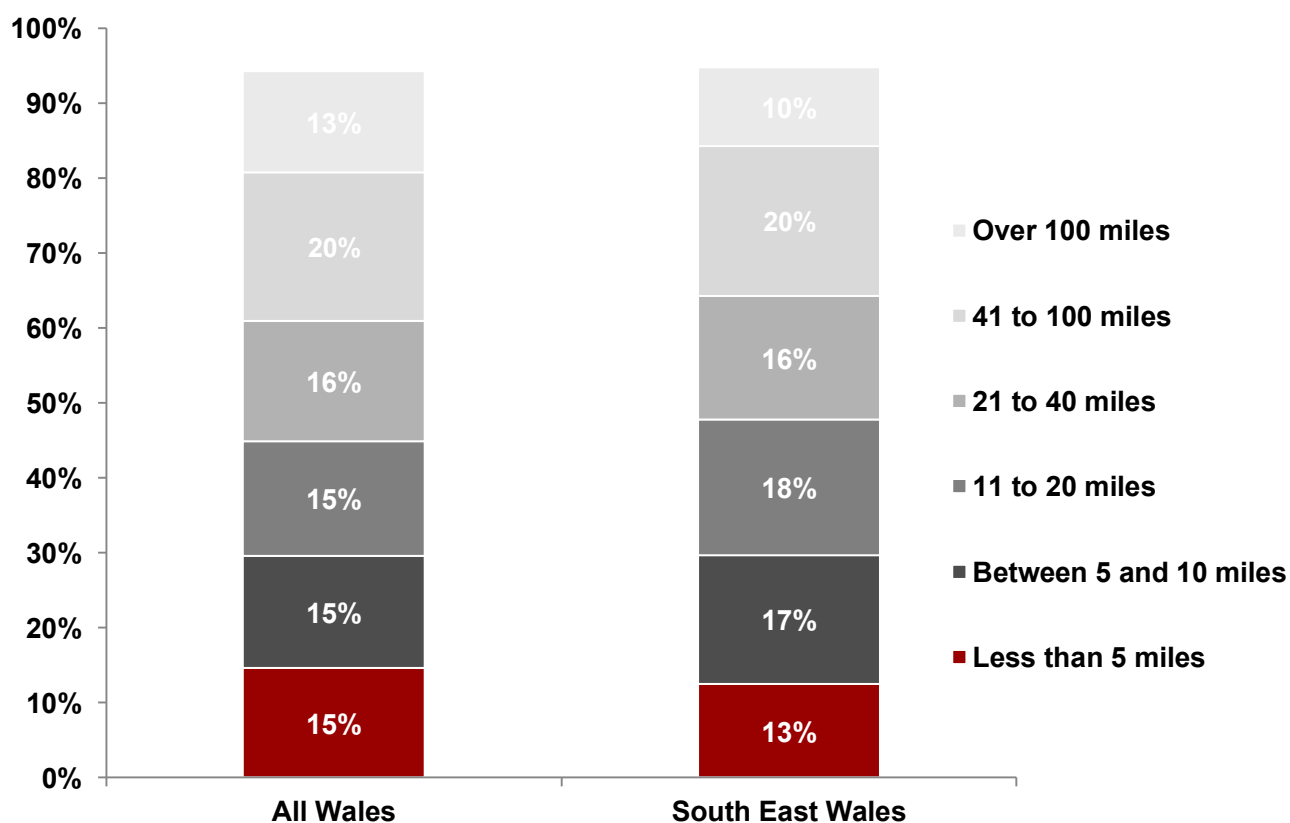
Table 2.9 Volume of Tourism Day Visits (millions) by Distance Travelled in All Wales and South East Wales – Annual Average 2014-2016

	All Wales	South East Wales
Total Visits	97	37
Less than 5 miles	14	5
Between 5 and 10 miles	15	6
11 to 20 miles	15	7
21 to 40 miles	16	6
41 to 100 miles	19	7
Over 100 miles	13	4

During 2014-2016 a fifth (20 per cent), of Tourism Day visitors to South East Wales and all Wales travelled between 41 to 100 miles.

For comparison, South East Wales had a smaller proportion than all Wales for Tourism Day visits travelling over a 100 miles (10 per cent and 13 per cent respectively) but a higher proportion for those travelling between 11 to 20 miles (18 per cent and 15 per cent respectively).

Figure 3.2 Proportion (%) of Tourism Day Visits to All Wales and South East Wales by Distance Travelled - Annual Average 2014-2016



Region of Residence

During 2014-2016, the majority of Tourism Day visits in all four regions originated from the Welsh region in question. For example the majority of Tourism Day visitors to South East Wales originated from South East Wales itself (65 per cent).

The second most common region of origin of Tourism Day visitors to South East Wales in 2014-2016 was South West Wales with an average of 3.01 million Tourism Day visits (8 per cent) residing in this area.

Table 3.0 Volume (millions) and Proportion (%) of Tourism Day Visits to South East Wales by Region of Residence – Annual Average 2014-2016

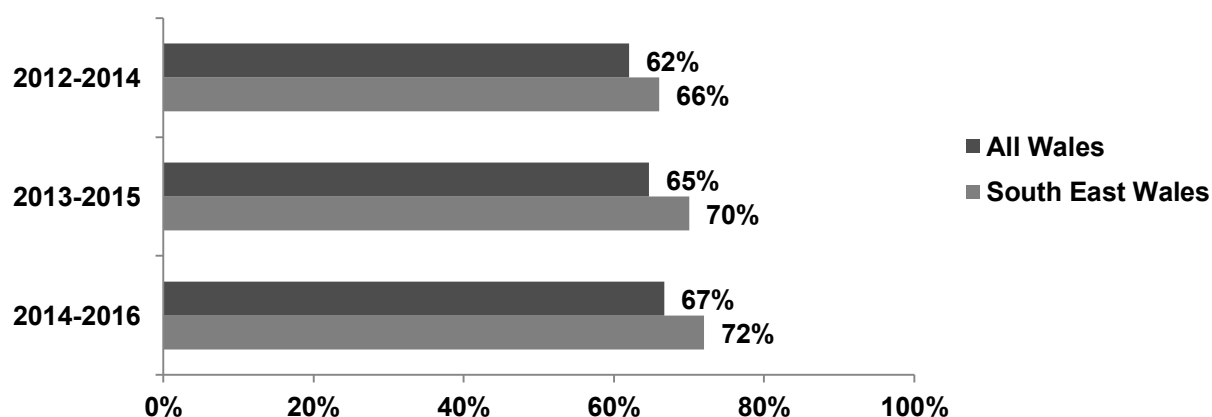
	South East Wales	
All Visits	37	100%
South East Wales	24.04	65%
South West Wales	3.01	8%
West Midlands	1.99	5%
South West England	1.92	5%
Mid Wales	1.04	3%
North West England	0.96	3%
South East England	0.78	2%
London	0.75	2%
East Midlands	0.45	1%
Scotland	0.35	1%
East of England	0.31	1%
Yorkshire and The Humber	0.25	1%
North Wales	0.07	0%
North East England	0.03	0%

5. Accommodation Occupancy Rates

All the data used for this section has been sourced from the Wales Tourism Accommodation Occupancy Survey. Figures shown are the averages taken over three years, 2014-2016, unless stated otherwise.

Hotels

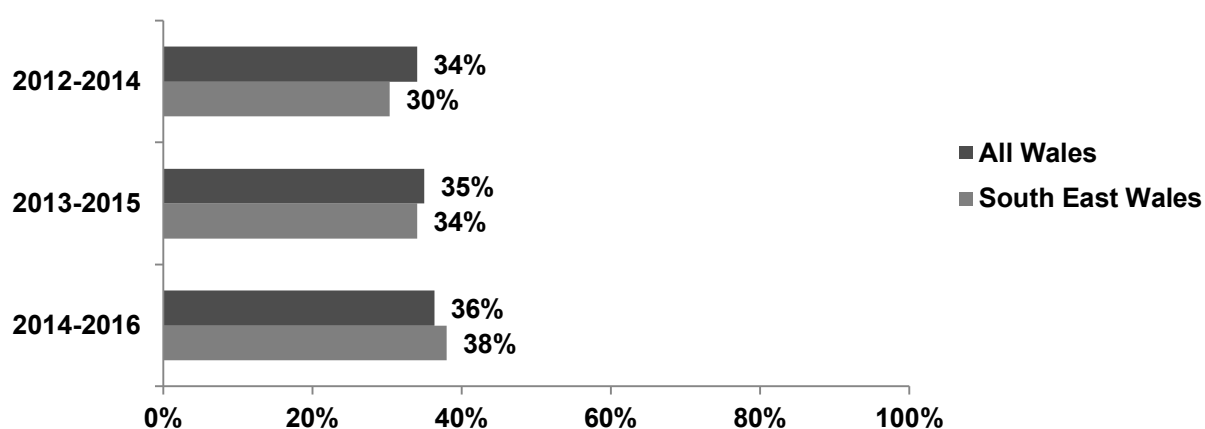
Figure 3.3 Three Year Average Hotel Room Occupancy Rates for All Wales and South East Wales



Hotel room occupancy rates in South East Wales have continued to increase over the years and in 2014-2016 South East Wales had the highest hotel room occupancy rates of all the four regions in Wales. For comparison, the average hotel room occupancy rate for South East Wales in 2014-2016 was 72 per cent, while it was 67 per cent for all Wales.

Guesthouses and B&Bs

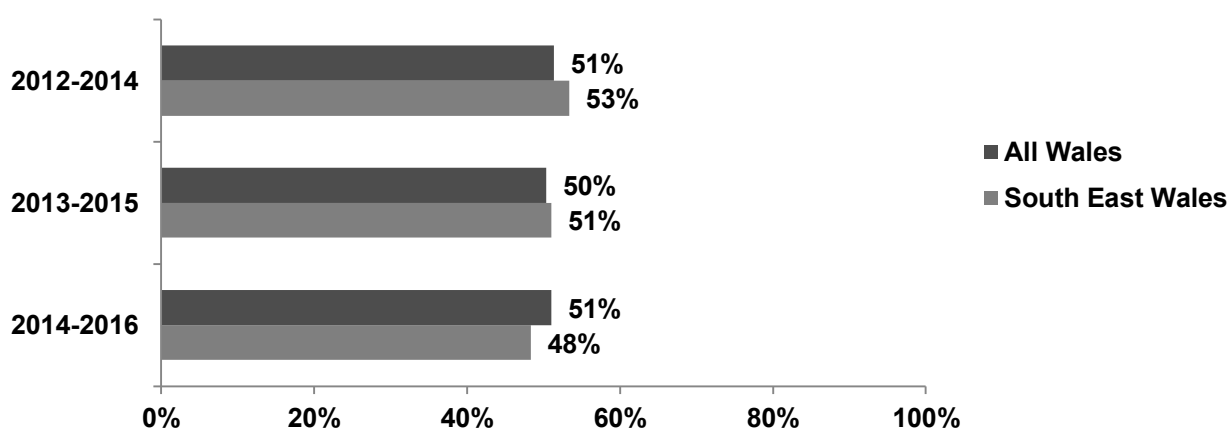
Figure 3.4 Three Year Average Guesthouse and B&B Room Occupancy Rates for All Wales and South East Wales



Like Hotel occupancy, Guesthouse/B&B room occupancy rates have continuously increased over the years. At 38 per cent in 2014-2016, South East Wales was 2 percentage points higher than the all Wales average of 36 per cent.

Self-Catering

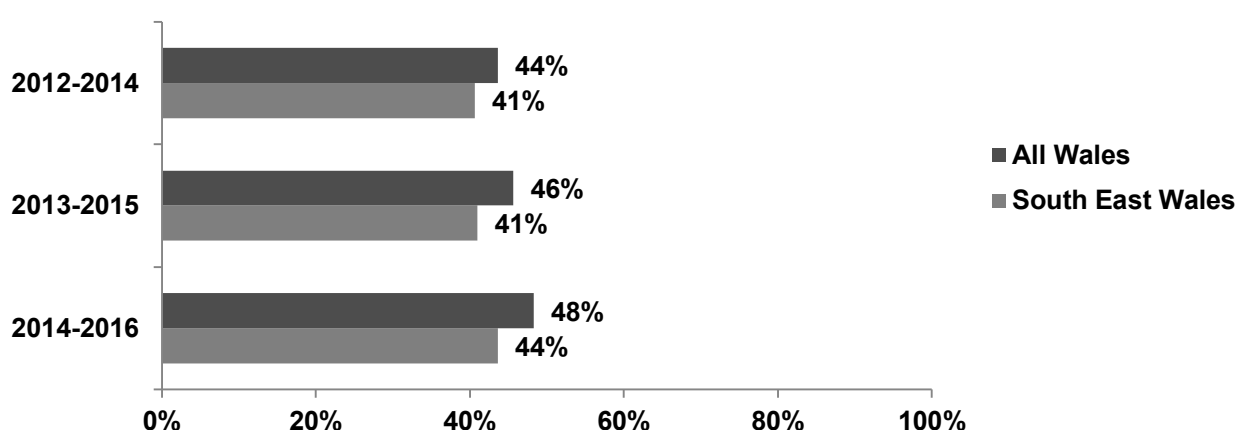
Figure 3.5 Three Year Average Self-Catering Unit Occupancy Rates for All Wales and South East Wales



Unlike for hotels and guesthouses/B&Bs, self-catering unit occupancy rates have decreased in recent years in South East Wales, and in 2014-2016 the unit occupancy rate, at 48 per cent, was just below the all Wales average of 51 per cent.

Hostels

Figure 3.6 Three Year Average Hostel Bedspace Occupancy Rates for All Wales and South East Wales



Along with South West Wales, South East Wales had the lowest hostel occupancy rates in Wales for 2014-2016 at 44 per cent. This was 4 percentage points below the all Wales average of 48 per cent over the same period.

6. Bedstock

The data used for this section has been sourced from the [Accommodation Bedstock](#) report. All figures in this section refer to 2013 data only.

South West Wales had 7 per cent of all accommodation establishments and 9 per cent of all bedspaces in Wales. The majority of accommodation establishments (499) and bedspaces (24,865) in South East Wales were Serviced. On the other hand, in Wales overall, the majority of establishments (7,067) were Self Catering, while bedspaces were Caravan/Camping.

Table 3.1 Volume of Establishments by Type of Accommodation in each Welsh Region and All Wales – 2013

	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative*
Total Establishments in Wales	3,205	7,067	1,322	224	50
North Wales	1,260	2,730	671	74	1
Mid Wales	646	995	214	69	28
South East Wales	499	276	74	29	3
South West Wales	800	3,066	363	52	18

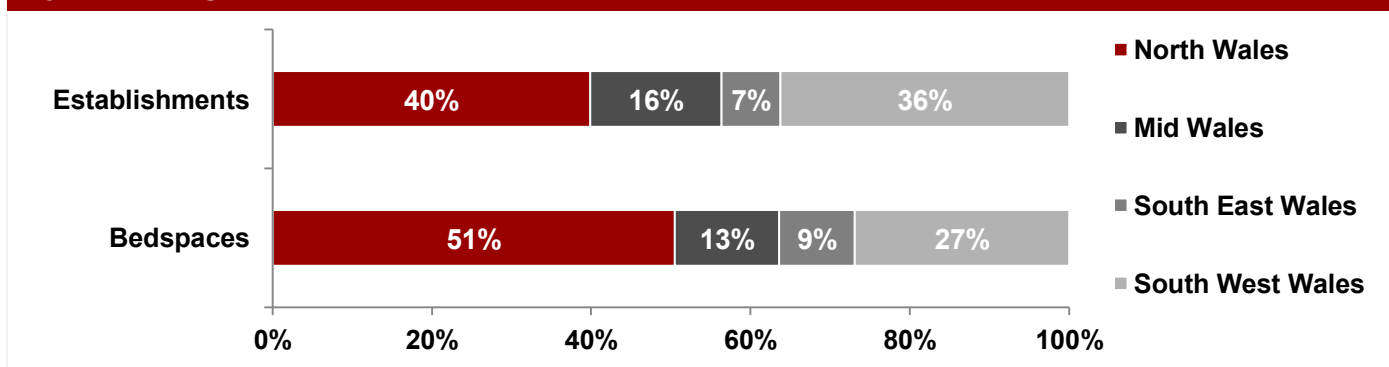
*Includes nomadic structures such as tipis and yurts, as well as Romany caravans.

Table 3.2 Volume of Bedspaces by Type of Accommodation in each Welsh Region and All Wales – 2013

	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative*
Total Bedspaces in Wales	79,086	63,168	399,124	17,300	1,013
North Wales	30,265	24,193	223,368	4,970	2
Mid Wales	8,883	9,681	50,269	3,943	383
South East Wales	24,865	2,903	21,018	4,341	25
South West Wales	15,073	26,391	104,469	4,046	603

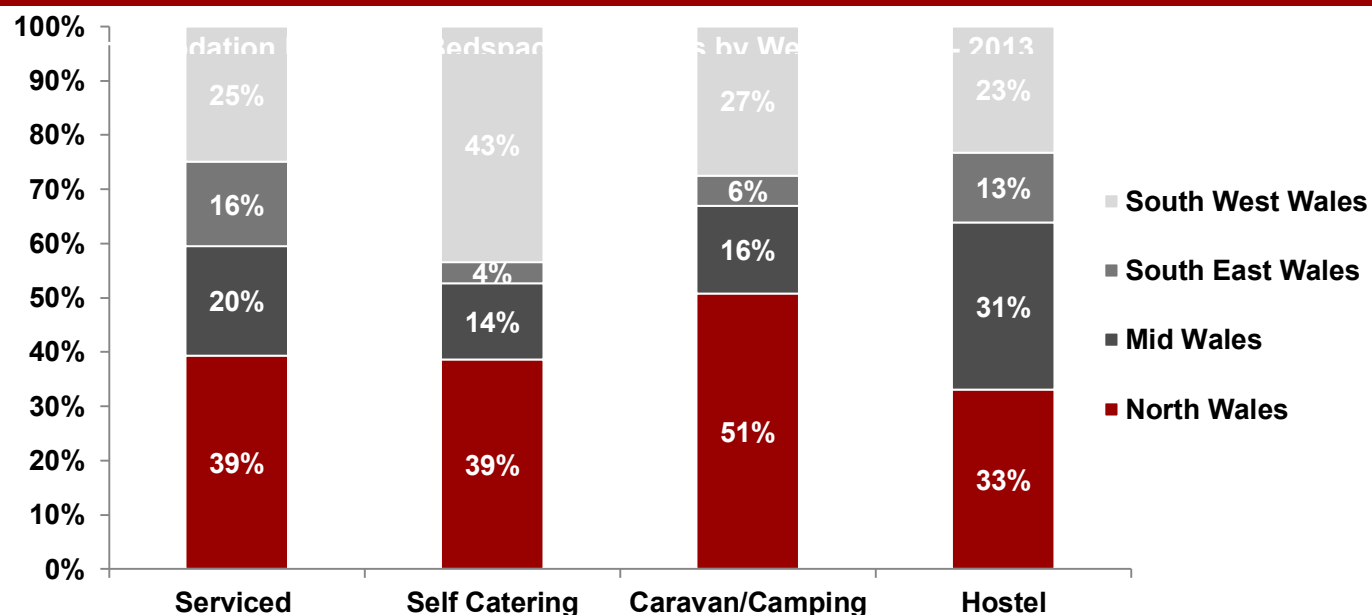
*Includes nomadic structures such as tipis and yurts, as well as Romany caravans.

Figure 3.7 Proportion (%) of Accommodation Bedstock Establishments and Bedspaces in Wales by Welsh Region – 2013



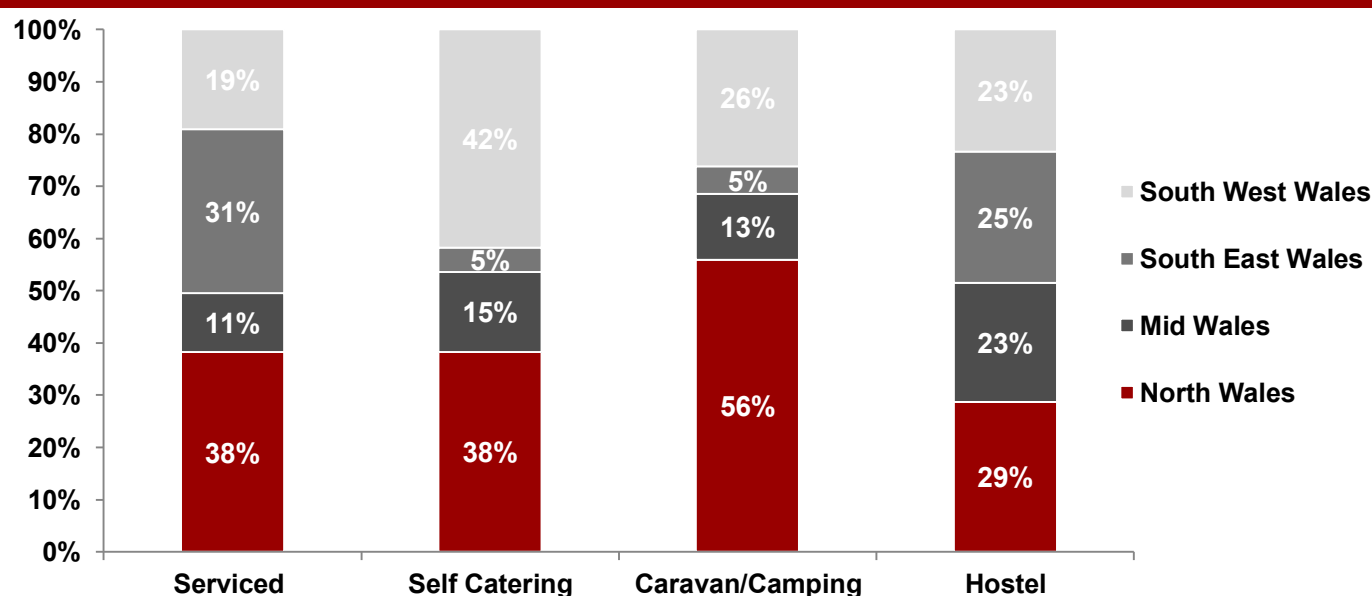
As seen in Figure 3.8, 16 per cent of serviced, 4 per cent of self-catering, 6 per cent of caravan/camping and 13 per cent of hostel accommodation establishments in Wales are located in South East Wales.

Figure 3.8 Proportion (%) of Accommodation Bedstock Establishments in Wales by Welsh Region - 2013



The proportion of accommodation bedspaces (Figure 3.9) in South East Wales for Self Catering and Caravan/Camping are similar to those for establishments. For example South East Wales had 4 per cent of all Self Catering establishments and 5 per cent of Self Catering bedspaces in Wales. In contrast, South East Wales had a higher proportion of serviced bedspaces (31 per cent) than serviced establishments (16 per cent). Furthermore, South East Wales also had a higher proportion of hostel bedspaces (25 per cent) than hostel establishments (25 per cent).

Figure 3.9 Proportion (%) of Accommodation Bedstock Bedspaces in Wales by Welsh region - 2013

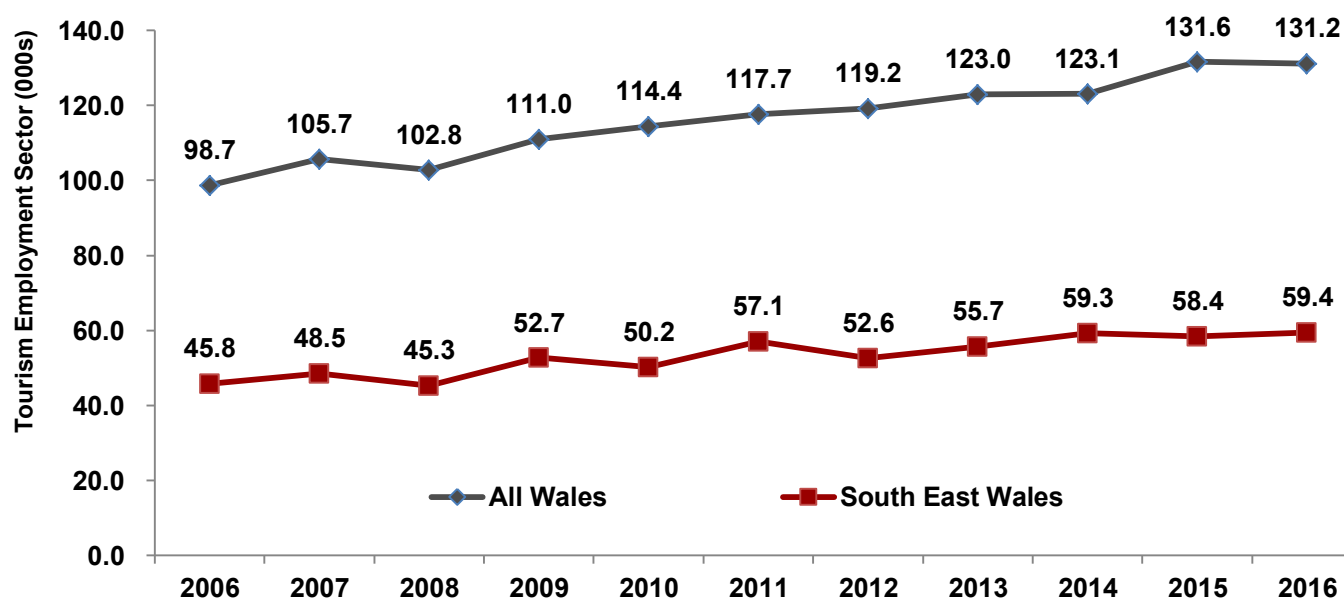


7. Tourism Sector Employment

Data for this section has been sourced from the [Welsh Government Priority Sector Statistics](#).

Although Wales as whole experienced a slight decrease in the number of those employed in the Tourism Sector, from 131,600 in 2015 to 131,200 in 2016, tourism employment in South East Wales increased from 58,400 to 59,400.

Figure 4.0 Number Employed (000s) per year in the Tourism Sector in All Wales and South East Wales



In 2016, the proportion of those employed in the Tourism Sector in South East Wales was 9 per cent, while it was 10 per cent for all Wales. Some of the Local Authorities within the South Wales Valleys tended to have fewer people employed in the tourism sector. Bridgend (11 per cent) and the Vale of Glamorgan (11 per cent) were the only local authorities in South East Wales with a higher average than all Wales (10 per cent) for the proportion of people employed in the Tourism Sector.

Figure 4.1 Proportion (%) of Tourism Sector Employment compared to all Other Sectors within All Wales, South East Wales and in each Local Authority in South East Wales - 2016

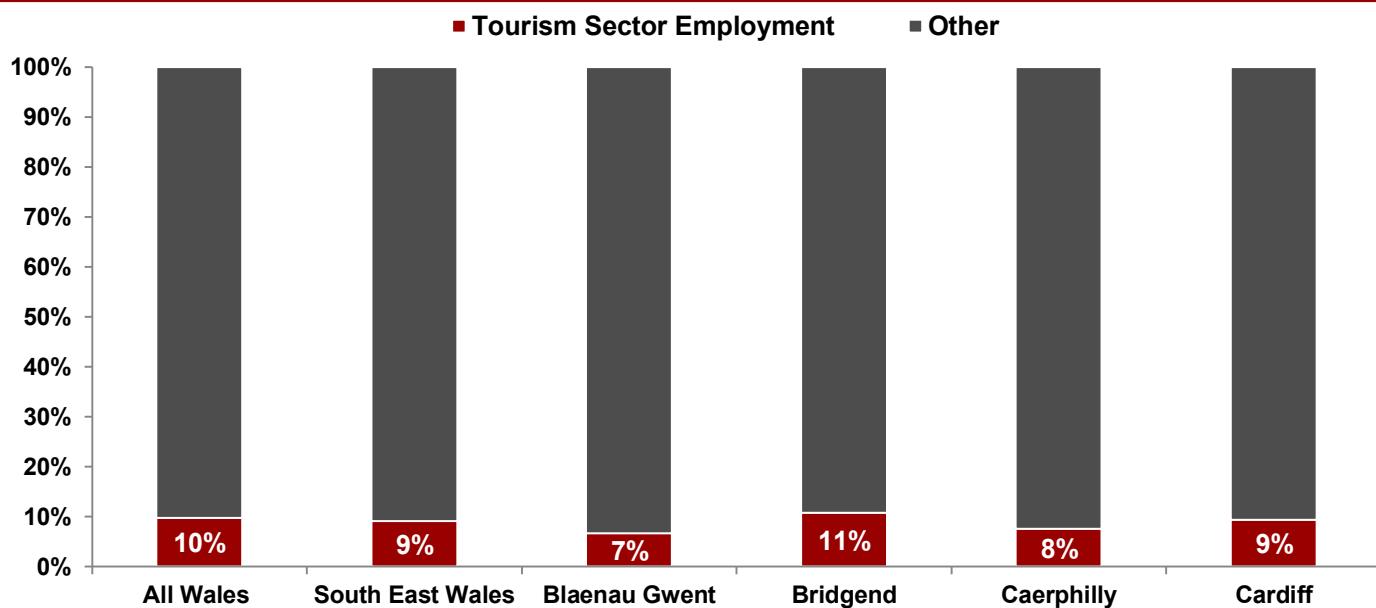
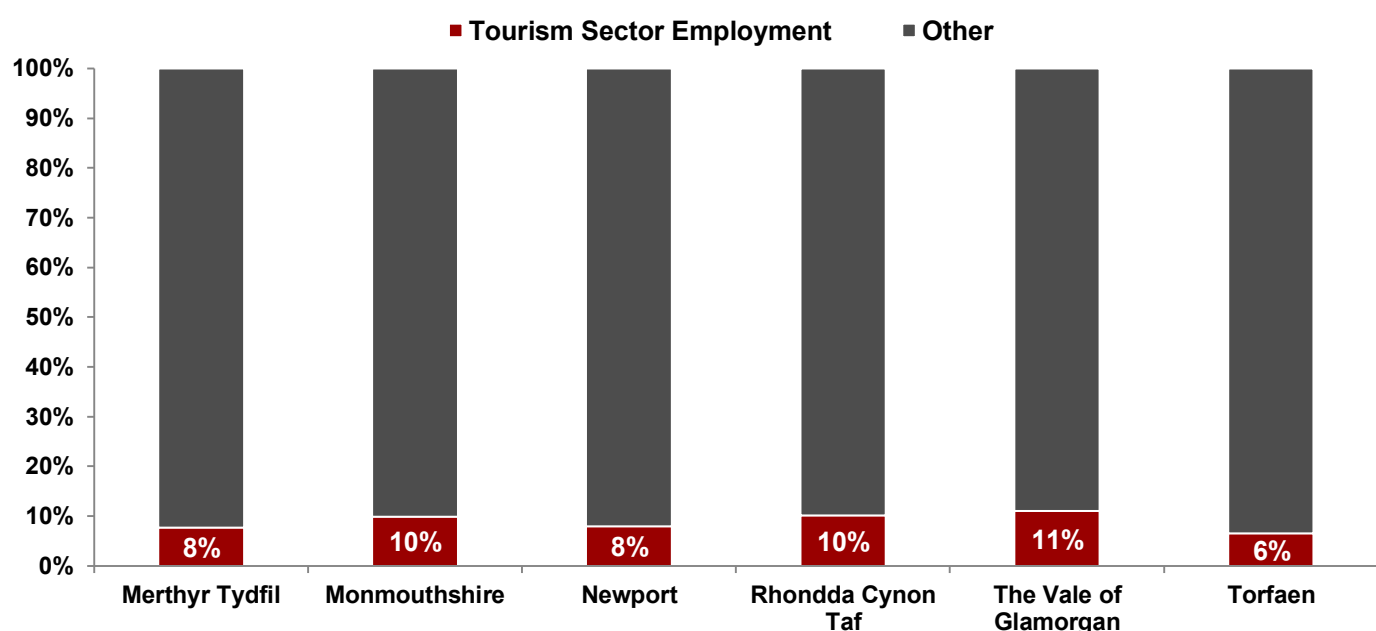


Figure 4.1 continued



8. Appendix

Overnight Domestic GB Visitors

Source: Great Britain Tourism Survey

Table 3.3 Volume of Overnight Domestic GB Trips (000s), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Annual Averages

Trips (000s)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	118,959	118,944	117,563	121,628	122,788	125,186	121,055	120,524	119,374
Wales	8,937	8,718	8,669	9,084	9,322	9,743	9,845	10,127	9,919
North Wales	3,105	3,030	3,184	3,264	3,417	3,488	3,655	3,713	3,626
Mid Wales	1,642	1,591	1,577	1,585	1,540	1,618	1,717	1,763	1,750
South East Wales	2,254	2,124	1,943	2,027	2,110	2,310	2,231	2,473	2,471
South West Wales	1,815	1,882	1,863	2,063	2,074	2,160	2,089	2,081	2,014
Nights (millions)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	378.860	379.046	372.160	378.725	378.989	383.059	370.464	366.751	362.068
Wales	33.238	32.084	32.380	33.429	34.144	34.450	34.496	34.986	34.751
North Wales	12.035	11.822	12.346	12.988	13.415	13.354	13.575	13.199	13.222
Mid Wales	6.463	6.026	6.204	6.131	6.087	6.244	6.535	6.794	6.819
South East Wales	6.202	5.818	5.476	5.241	5.370	5.494	5.291	6.097	6.213
South West Wales	7.676	7.558	7.382	7.983	8.066	8.243	8.166	8.153	7.907
Spend (£ millions)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	20,165	20,458	20,312	21,145	22,146	23,312	23,320	23,603	23,532
Wales	1,473	1,403	1,413	1,523	1,587	1,673	1,673	1,802	1,800
North Wales	492	495	510	545	546	582	591	639	639
Mid Wales	239	228	252	257	255	262	281	309	311
South East Wales	375	328	302	309	349	374	361	418	421
South West Wales	326	308	314	364	390	397	390	386	

International Visitors

Source: *International Passenger Survey*

Table 3.4 Volume of International Visits (thousands), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Averages									
Visits (thousands)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	32,460	31,520	30,527	30,163	30,560	31,523	32,717	34,397	36,037
Wales	1,063	1,014	982	920	874	867	885	924	992
North Wales	298	304	291	273	250	235	232	253	274
Mid Wales	89	82	87	80	84	80	82	87	98
South East Wales	511	473	458	434	429	436	441	467	497
South West Wales	214	202	202	191	175	175	191	191	205
Nights (millions)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB									
Wales	7.737	6.845	6.806	6.279	6.553	6.427	6.547	6.627	7.061
North Wales	1.792	1.572	1.509	1.512	1.652	1.624	1.621	1.572	1.729
Mid Wales	0.637	0.614	0.622	0.496	0.526	0.510	0.576	0.626	0.691
South East Wales	3.631	3.050	3.064	2.834	3.135	3.023	3.002	3.002	3.121
South West Wales	1.570	1.547	1.545	1.368	1.184	1.221	1.298	1.357	1.449
Spend (£ millions)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	15,980	16,183	16,497	17,050	17,720	19,157	20,440	21,583	22,027
Wales	338	328	326	331	336	342	355	376	407
North Wales	77	83	79	79	79	75	76	82	88
Mid Wales	27	23	27	25	32	35	37	39	45
South East Wales	166	155	155	162	166	168	165	175	178
South West Wales	62	62	62	61	55	62	74	76	90

Tourism Day Visitors

Source: Great Britain Day Visits Survey

Please note that since 2016 there have been several revisions to the way this survey has been carried out which has affected the comparability of 2011-2015 figures with those from 2016 onwards. To remedy this, figures pre-2016 have been reweighted by +15 per cent in order to be able to compare them. Thus some of the Tourism Day visits figures below might not match those previously provided.

Table 3.5 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) - Three Year Annual Averages				
Trips (thousands)				
	2011-2013	2012-2014	2013-2015	2014-2016
GB	1,857	1,872	1,801	1,803
Wales	112	107	97	97
North Wales	29	28	26	28
Mid Wales	12	14	13	11
South East Wales	47	43	38	37
South West Wales	24	23	21	21
Spend (£ millions)				
	2011-2013	2012-2014	2013-2015	2014-2016
GB	62,498	63,161	61,938	62,560
Wales	3,770	3,669	3,240	3,432
North Wales	857	1,051	889	1,052
Mid Wales	381	363	354	307
South East Wales	1,727	1,622	1,379	1,533
South West Wales	729	740	701	694

Accommodation Occupancy Rates

Source: *Wales Tourism Accommodation Occupancy Surveys*

Table 3.6 Accommodation Occupancy Rates in Wales and in each Welsh Region - Three Year Annual Averages							
Hotel - Room Rates				Self Catering - Unit Rates			
	2012-2014	2013-2015	2014-2016		2012-2014	2013-2015	2014-2016
Wales	62%	65%	67%	Wales	51%	50%	51%
North Wales	64%	66%	67%	North Wales	57%	57%	57%
Mid Wales	53%	52%	52%	Mid Wales	45%	45%	47%
South East Wales	66%	70%	72%	South East Wales	53%	51%	48%
South West Wales	55%	59%	63%	South West Wales	46%	47%	50%
Guesthouse/B&B - Room Rates				Hostel - Bedspace Rates			
	2012-2014	2013-2015	2014-2016		2012-2014	2013-2015	2014-2016
Wales	34%	35%	36%	Wales	44%	46%	48%
North Wales	34%	35%	37%	North Wales	50%	52%	54%
Mid Wales	30%	30%	29%	Mid Wales	42%	46%	50%
South East Wales	30%	34%	38%	South East Wales	41%	41%	44%
South West Wales	41%	42%	43%	South West Wales	39%	41%	44%

Bedstock

Source: Accommodation Bedstock Surveys

Table 3.7 Volume of Accommodation Bedstock Establishments and Bedspaces in Wales and in each Welsh Region – 2013					
Establishments					
	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative
Wales	3,205	7,067	1,322	224	50
North Wales	1,260	2,730	671	74	1
Mid Wales	646	995	214	69	28
South East Wales	499	276	74	29	3
South West Wales	800	3,066	363	52	18
Bedspaces					
	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative
Wales	79,086	63,168	399,124	17,300	1,013
North Wales	30,265	24,193	223,368	4,970	2
Mid Wales	8,883	9,681	50,269	3,943	383
South East Wales	24,865	2,903	21,018	4,341	25
South West Wales	15,073	26,391	104,469	4,046	603

Tourism Sector Employment

Source: Welsh Government Priority Sector Statistics

Table 3.8 Volume of Tourism Sector Employment (thousands) in Wales and in each Welsh Region											
Tourism Sector Employment (thousands)											
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Wales	98.7	105.7	102.8	111.0	114.4	117.7	119.2	123.0	123.1	131.6	131.2
North Wales	23.5	24.1	27.3	25.2	30.1	28.5	29.7	30.7	27.5	32.2	31.2
Mid Wales	8.0	8.8	7.5	8.4	9.2	7.2	9.7	8.5	9.5	12.1	10.8
South East Wales	45.8	48.5	45.3	52.7	50.2	57.1	52.6	55.7	59.3	58.4	59.4
South West Wales	21.4	24.1	22.7	24.5	24.7	24.9	27.1	28.2	27.0	29.0	30.1

Great Britain Tourism Survey

Type of Accommodation used on an Overnight Domestic GB Trip

Source: Great Britain Tourism Survey

Table 3.9 Accommodation Categories included under NET

2014, 2015	2016
Hotel/Motel (NET)	Hotel/Motel (NET)
Hotel/Motel	Hotel
	Motel
Guest house/Farmhouse/B&B (NET)	Guest house/Farmhouse/B&B (NET)
Paying guest in - Other private house /B&B	Bed & Breakfast
Guest house	Guest house
Paying guest in - farmhouse	Farmhouse
Self catering (NET)	Self catering (NET)
Self-catering in Rented - Flat/Apartment	Self-catering in rented flat\apartment
Self-catering in Rented - House/chalet/villa/bungalow/cottage	Self-catering in rented house\chalet\villa\bungalow\cottage
Holiday camp/Village - Self-catering	Holiday camp\villaage - self catering
Friend's home/Relative's home/Second home/Timeshare	Friend's home/Relative's home/Second home/Timeshare
Friend's /relatives home	Friend's home
Own Second home/timeshare	Relative's home
	Own second home\timeshare
Caravan and Camping (NET)	Caravan and Camping (NET)
Camping	Caravan and Camping
Caravan - Towed	
Caravan - Static owned	
Caravan - Static not owned	