

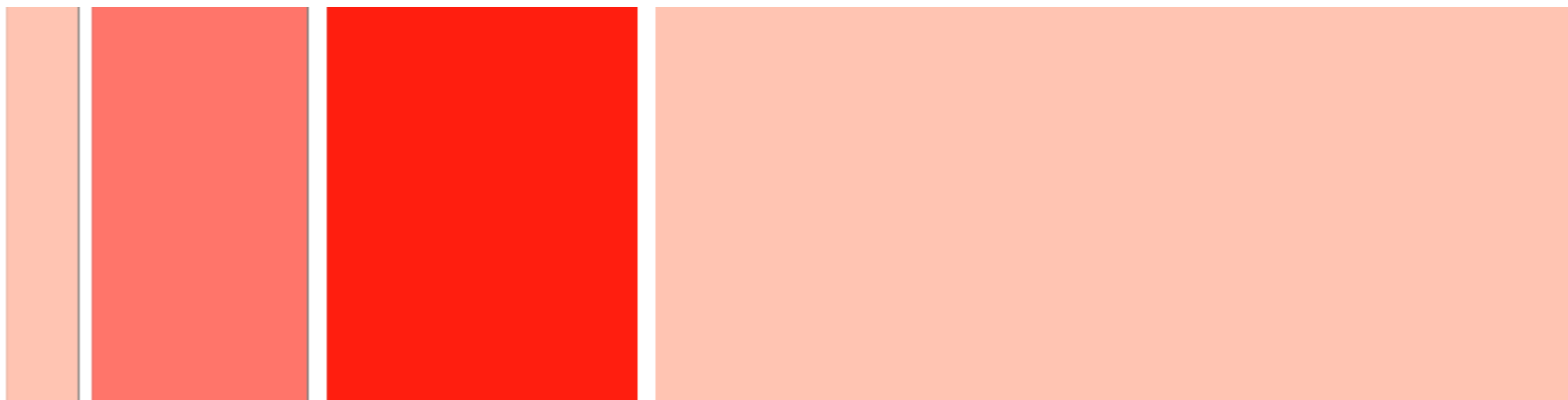
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Tourism Profile – South West Wales 2014 - 2016



Title: Tourism Profile – South West Wales 2014 - 2016

Subtitle: Summary of tourism trends for the South West 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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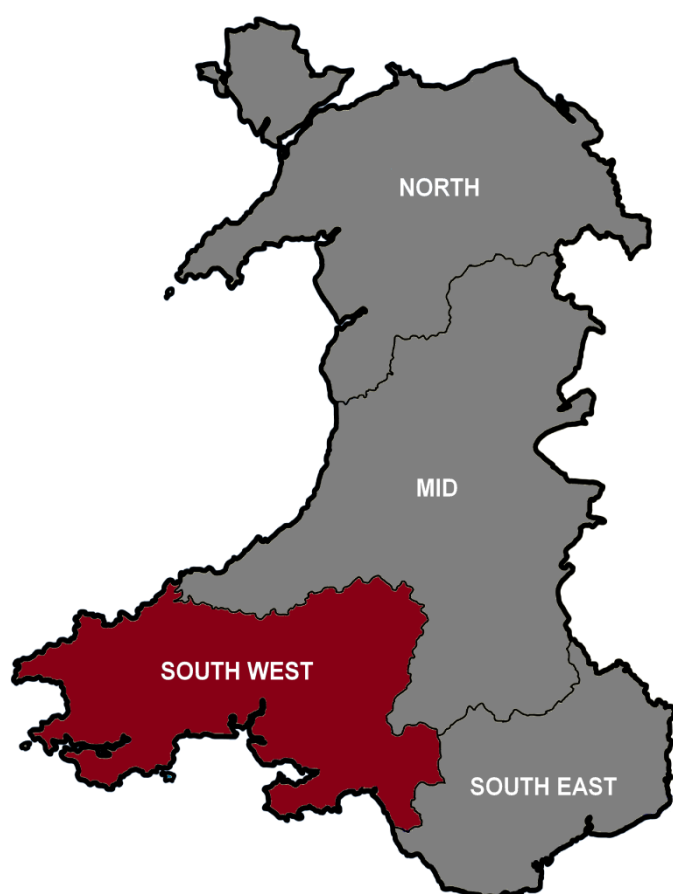
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This report contains tourism-related data for the South West Wales region for the period 2014-2016 providing comparisons with the overall GB level, all-Wales level and the other regions of Wales. Please refer to the other three Wales regional tourism 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 West Wales accounted for 20 per cent of overnight domestic GB trips, 21 per cent of international visits and 22 per cent of Tourism Day visits to Wales.

The annual average volume of all tourism visitor types (overnight domestic GB trips, international visits and Tourism Day visits) to South West Wales between 2013-2015 and 2014-2016 has increased by 3 per cent to 23,552 thousand, while related expenditure increased by 1 per cent to £1,172 million. In comparison, the annual average volume of visitors for all Wales remained unchanged at 0 per cent, while tourism related expenditure increased by 4 per cent to £5,639 million.

Please refer to [Table 1.0](#)

Both South West Wales and all Wales experienced similar levels of decreases in the annual average volume of overnight domestic GB trips between 2013-2015 and 2014-2016; South West Wales decreasing by 3 per cent to 2,014 thousand and all Wales by 2 per cent to 9,919 thousand. Furthermore, related

expenditure over the same period for South West Wales (£387 million) and Wales overall (£1,800 million) remained unchanged, at 0 per cent. Please refer to [Table 1.1](#)

The annual average volume of international visits to South West Wales between 2013-2015 and 2014-2016 increased by 7 per cent to 205,000. In addition, related expenditure over the same time frame in South West Wales increased by a considerable 19 per cent to £90 million. In comparison, during the same period, the volume of international visits to all Wales also increased by 7 per cent to 992,000, 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 West Wales increased by 3 per cent to 21 million, while related expenditure decreased by 1 per cent to £694 million. In comparison, 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 Annual 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 Annual 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 Annual 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 Annual 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

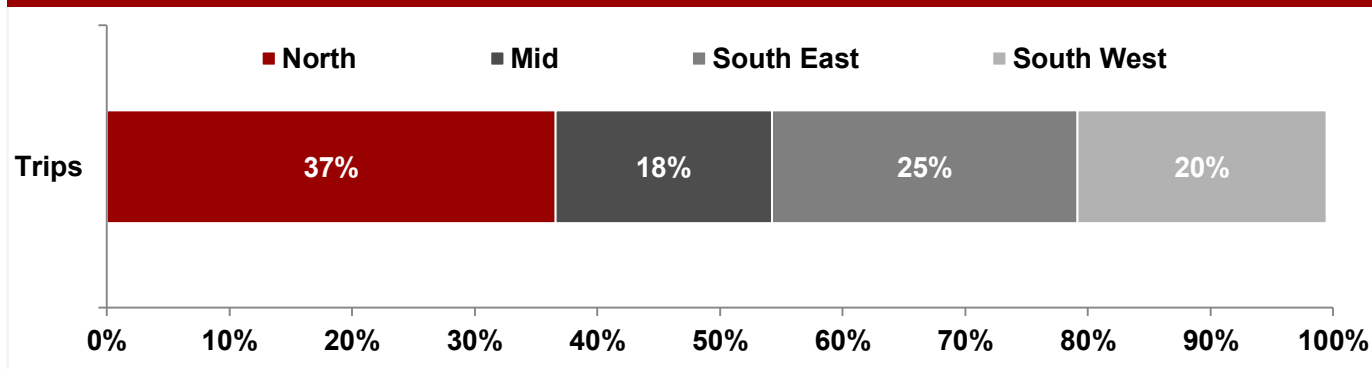
Source: Great Britain Day Visits Survey

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.

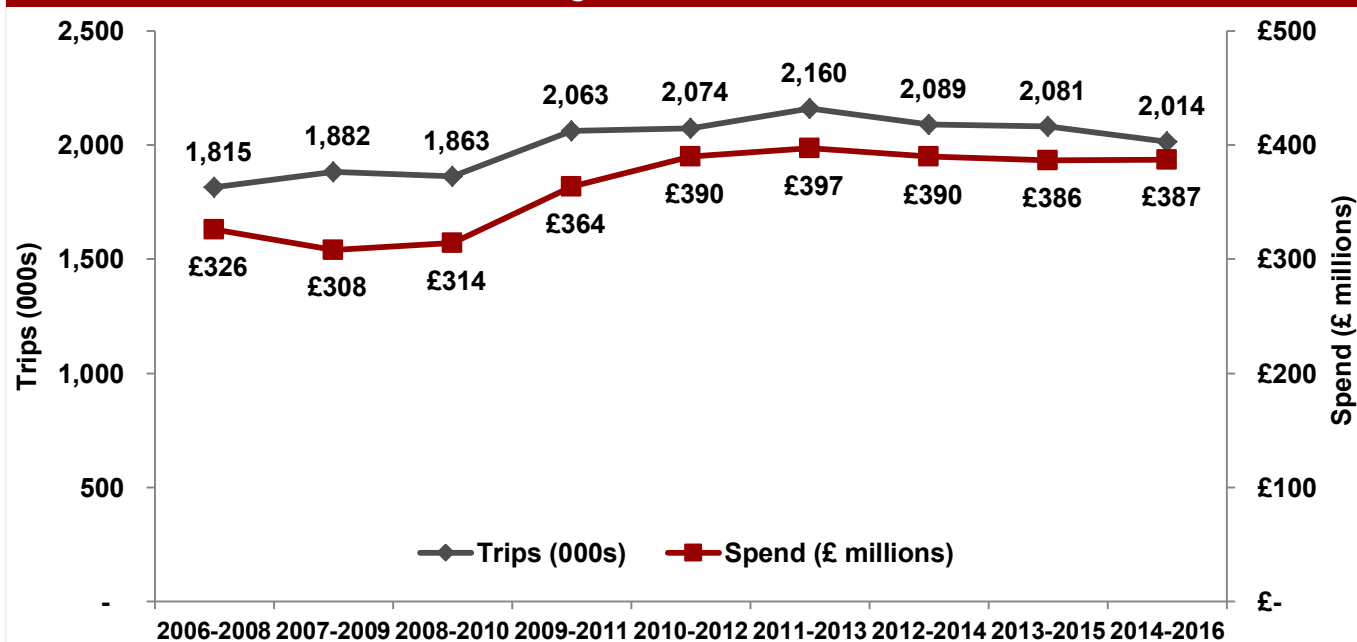
Over the period of 2014-2016, South West Wales received an average of 2,014,000 overnight domestic overnight GB trips per year. During this period these visitors generated an annual average of £387 million. South West Wales received a fifth (20 per cent) of all overnight domestic GB trips to Wales.

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 West Wales – Three Year Annual Averages



Both volume of overnight domestic GB trips and related expenditure to South West Wales peaked in 2011-2013, with 2,160,000 trips and £397 million. From then on, trips and related expenditure have continued to decrease slightly over the years.

Average Spend per Trip

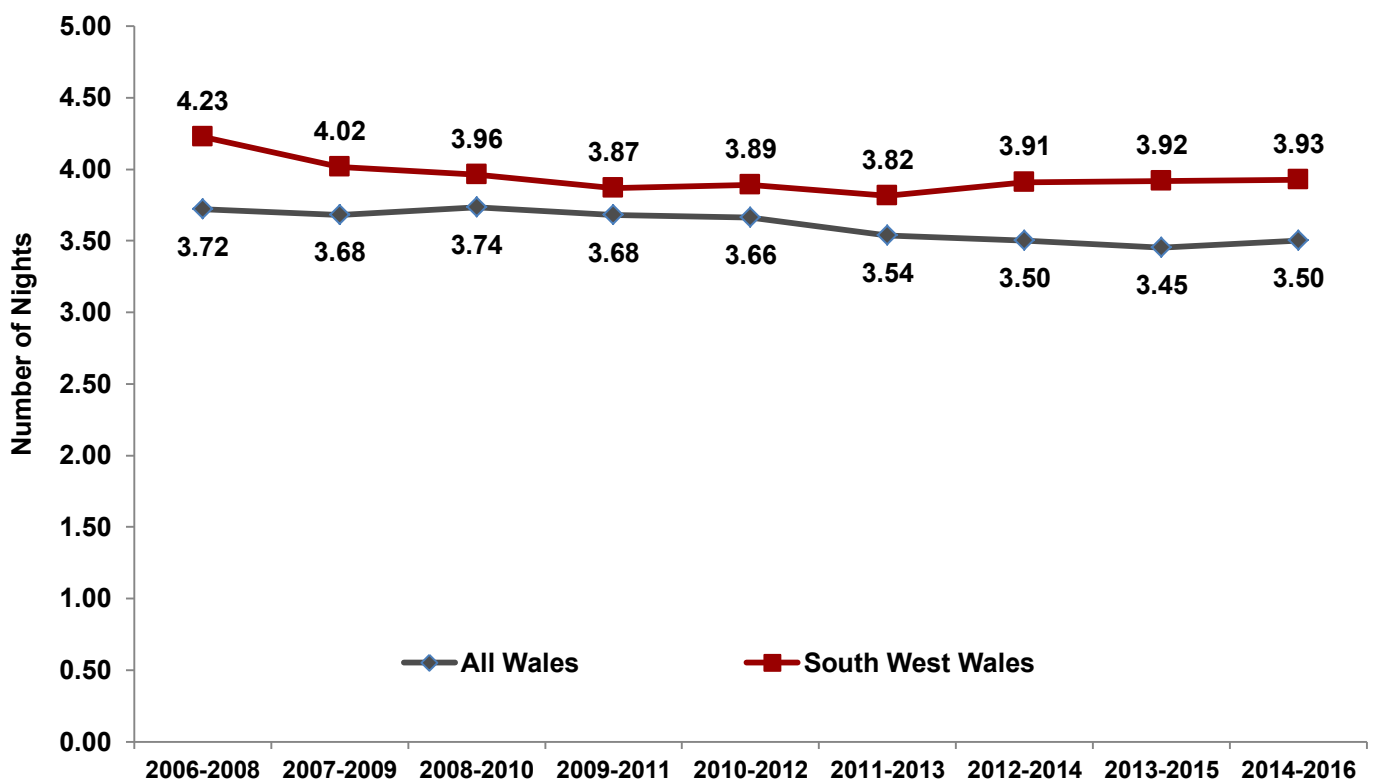
Figure 1.2 Average Spend per Overnight Domestic GB Trip (£) to Wales and South West Wales - Three Year Annual Averages



Although volume of overnight domestic GB trips and related expenditure have decreased in recent years, South West Wales, of all the Welsh regions, had the highest spend per overnight domestic GB trip in 2014-216 at £192. In comparison, the overall Wales average for the same period was £181.

Average Number of Nights per Trip

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

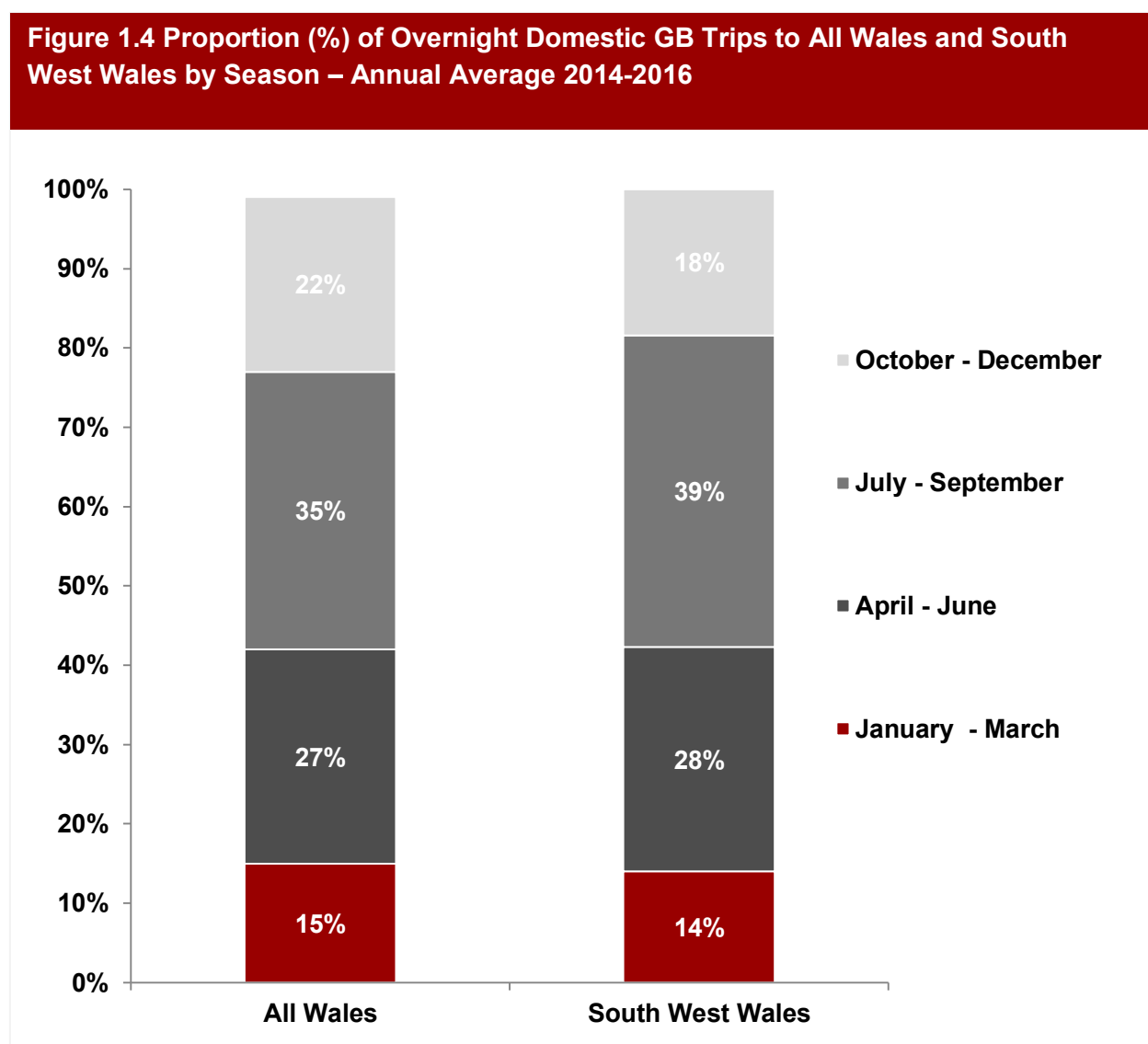


The average number of nights per overnight domestic GB trip to South West Wales has consistently been higher than the all Wales average. In 2014-2016, the average number of nights per trip in South West Wales was 3.93, while the comparative average for Wales overall was 3.50. Moreover, in 2014-2016 South West Wales had the highest average number of nights per overnight domestic GB trip of all the Welsh regions.

Seasonality of Trips

Figure 1.5 for South West Wales reflects typical high and low season periods. Overnight domestic GB visitors tended to arrive during the summer months of July-September (39 per cent) or April-June (28 per cent), with Easter usually falling during the month of April.

During 2014-2016, South West Wales shared a similar seasonality pattern to that of all Wales.



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 West Wales – Annual Average 2014-2016

	All Wales	South West Wales
Total Trips	9,919	2,014
Hotel/Motel (NET)	2,233	360
Guest house/Farmhouse/B&B (NET)	836	154
Self catering (NET)	1,169	394
Friend's home/Relative's home/Second home/Timeshare	2,938	605
Caravan and Camping (NET)	2,496	495

During 2014-2016, South West Wales and all Wales had similar proportion for overnight domestic GB visitors staying in 'Caravan and Camping (NET)' (25 per cent) and 'Friend's home/Relative's home/Second home/Timeshare' (30 per cent). On the other hand, South West Wales had a higher proportion of trips involving a stay in 'Self catering (NET)' than the all Wales average (20 per cent and 12 per cent respectively).

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

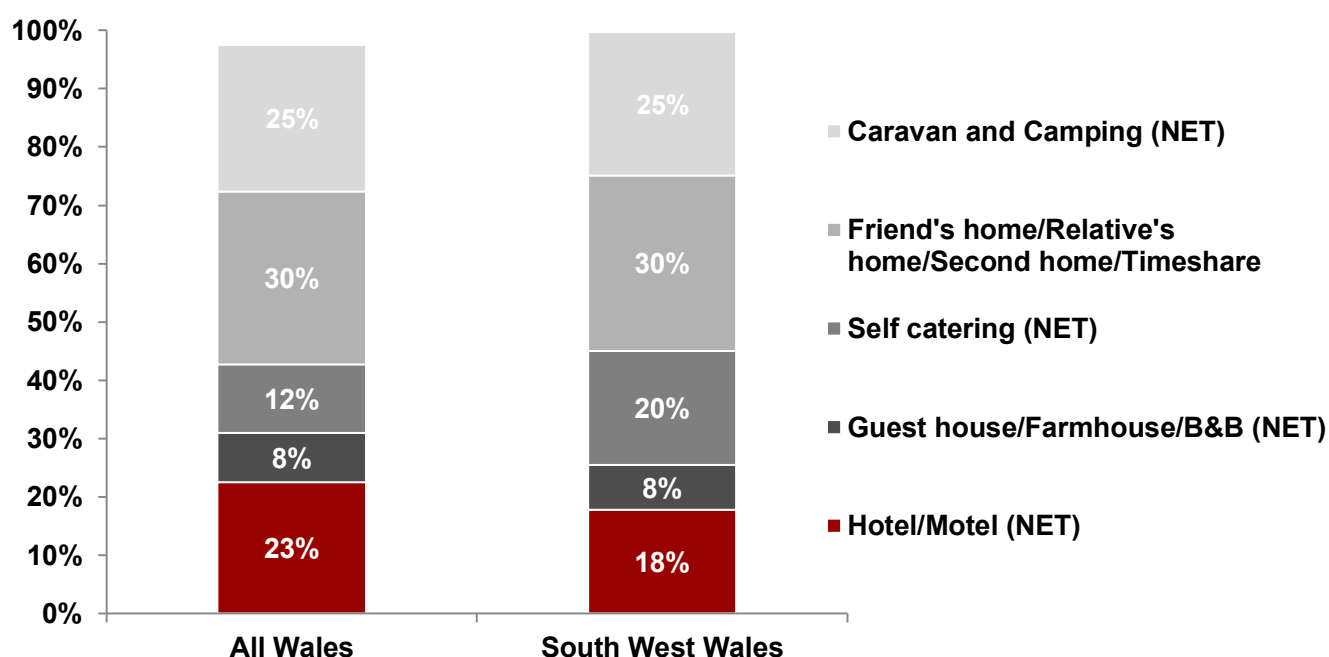
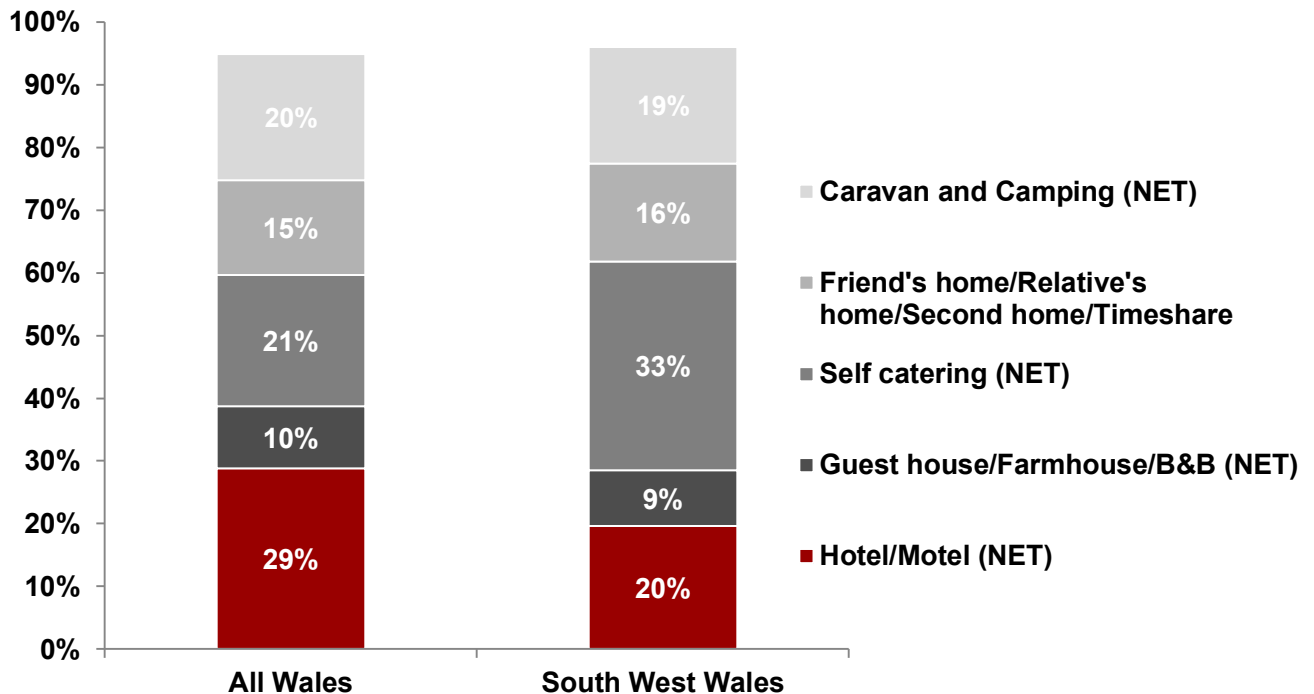


Table 1.5 Value of Related Expenditure (£ millions) from Overnight Domestic GB Trips by Type of Accommodation Used during a trip to Wales and South West Wales – Annual Average 2014-2016

	All Wales	South West Wales
Total Expenditure	1,800	387
Hotel/Motel (NET)	518	76
Guest house/Farmhouse/B&B (NET)	178	34
Self catering (NET)	376	129
Friend's home/Relative's home/Second home/Timeshare	272	61
Caravan and Camping (NET)	362	72

In South West Wales, even though only a fifth (20 per cent, 394,000 trips) overnight domestic GB visitors stayed in 'Self catering (NET)', this type of accommodation accounted for a third (33 per cent, £129 million) of related expenditure. This trend was also seen in all Wales, where even though only 12 per cent of overnight domestic GB trips involved a stay in 'Self catering (NET)' accommodation, it generated 21 per cent (£376 million) of related expenditure.

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



Purpose of Trip

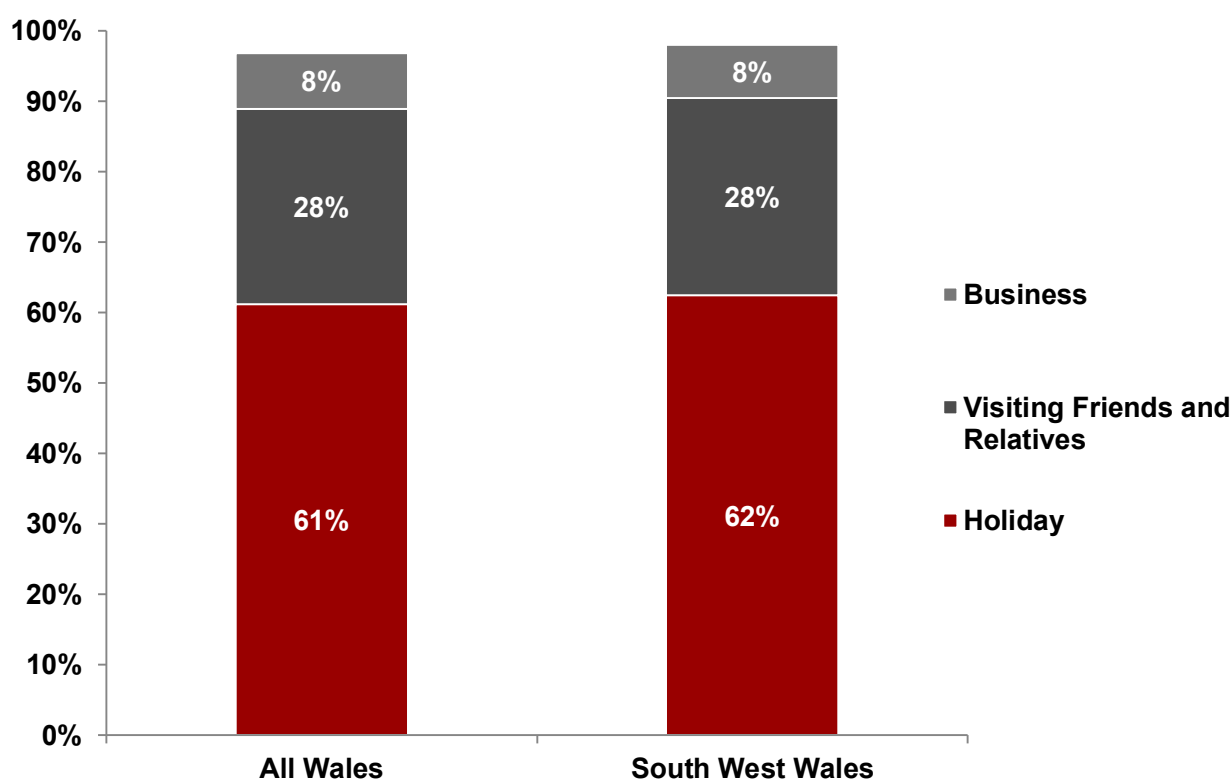
Table 1.6 Volume of Overnight Domestic GB Trips (000s) by Purpose of Trip to All Wales and South West Wales – Annual Average 2014-2016

	All Wales	South West Wales
Total Trips	9,919	2,014
Holiday	6,065	1,258
Visiting Friends and Relatives	2,755	564
Business	779	152

During 2014-2016, nearly a third of overnight domestic GB trips to South West Wales were to visit friends and relatives (28 per cent). In addition, 62 per cent of visitors came for a holiday, while 8 per cent came on business.

South West Wales was the only Welsh region to show nearly identical purpose of trip proportions to Wales overall.

Figure 1.7 Proportion (%) of Trips to All Wales and South West 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 '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 West Wales – Annual Average 2014-2016

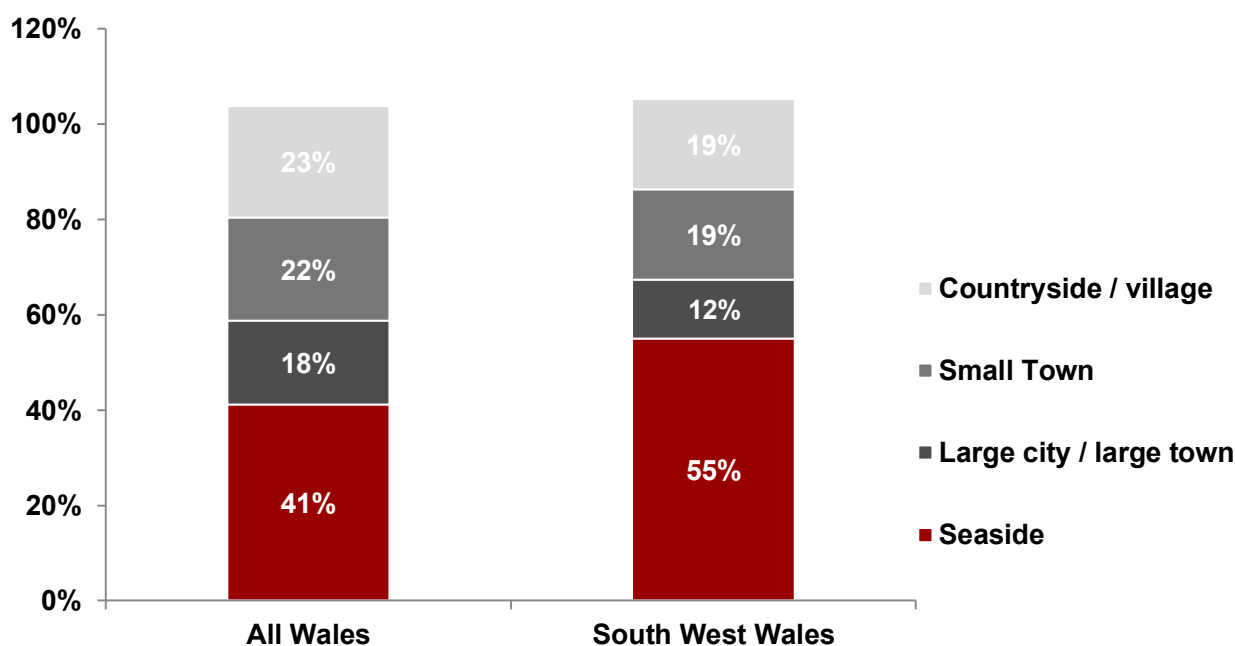
	All Wales	South West Wales
Total Trips	9,919	2,014
Seaside	4,076	1,106
Large city / large town	1,747	250
Small town	2,143	381
Countryside / village	2,320	381

In 2014-2016 the most popular destination for overnight domestic GB trips to South West Wales was the seaside (55 per cent), a higher proportion than the overall Wales average of 41 per cent.

The least popular destination to visit on an overnight domestic GB trip to South West Wales in 2014-2016 was a large city or town (12 per cent). In contrast, during the same time frame, 18 per cent of all the overnight domestic GB trips to Wales were to this type of location. Furthermore, of all the Welsh regions, South West Wales had the smallest proportion of overnight domestic GB trips visiting a small town (19 per cent).

It is important to bear in mind that respondents themselves choose how to 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 West 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.*

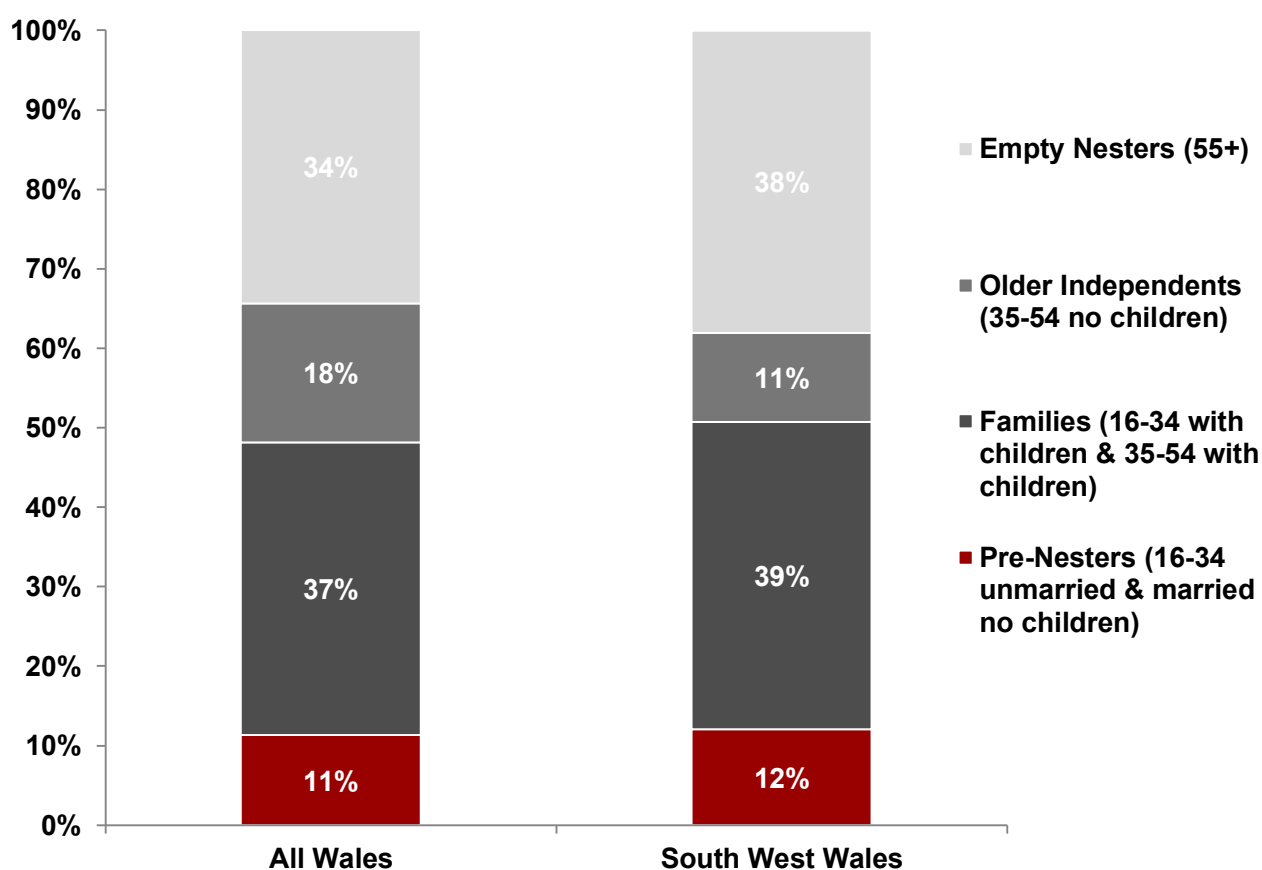
Lifestage

Table 1.8 Volume of Overnight Domestic GB Holiday Trips (000s) by Lifestage to All Wales and South West Wales – Annual Average 2014-2016

	All Wales	South West Wales
Total Holiday Trips	6,065	1,258
Pre-Nesters (16-34 unmarried & married no children)	685	152
Families (16-34 with children & 35-54 with children)	2,234	486
Older Independents (35-54 no children)	1,063	141
Empty Nesters (55+)	2,083	479

During 2014-2016, the majority of overnight domestic GB holiday trips to South West Wales were made by families (39 per cent). Furthermore, South West Wales had a higher proportion of empty nesters (38 per cent) compared to Wales overall (34 per cent). In contrast, South West Wales had a lower proportion of older independents (11 per cent) compared to the all Wales average of 18 per cent.

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

	All Wales	South West Wales
Total Trips	9,919	2,014
Scotland	101	16
Wales	2,048	664
England	7,766	1,335
North East England	161	35
North West England	1,885	121
Yorkshire and the Humber	499	75
East Midlands	537	93
West Midlands	1,716	302
East of England	369	98
London	611	135
South East England	909	232
South West England	1,079	243

For 2014-2016, South West Wales, had a higher proportion of overnight domestic GB trips originating from Wales (33 per cent and 21 per cent respectively) but a smaller proportion of English visitors (66 per cent and 78 per cent respectively) when compared to Wales overall.

The majority of trips to South West Wales from England originated from the West Midlands (15 per cent), similar to the proportion for Wales overall (17 per cent).

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

	All Wales	South West Wales
Total Trips	100%	100%
Scotland	1%	1%
Wales	21%	33%
England	78%	66%
North East England	2%	2%
North West England	19%	6%
Yorkshire and the Humber	5%	4%
East Midlands	5%	5%
West Midlands	17%	15%
East of England	4%	5%
London	6%	7%
South East England	9%	12%
South West England	11%	12%

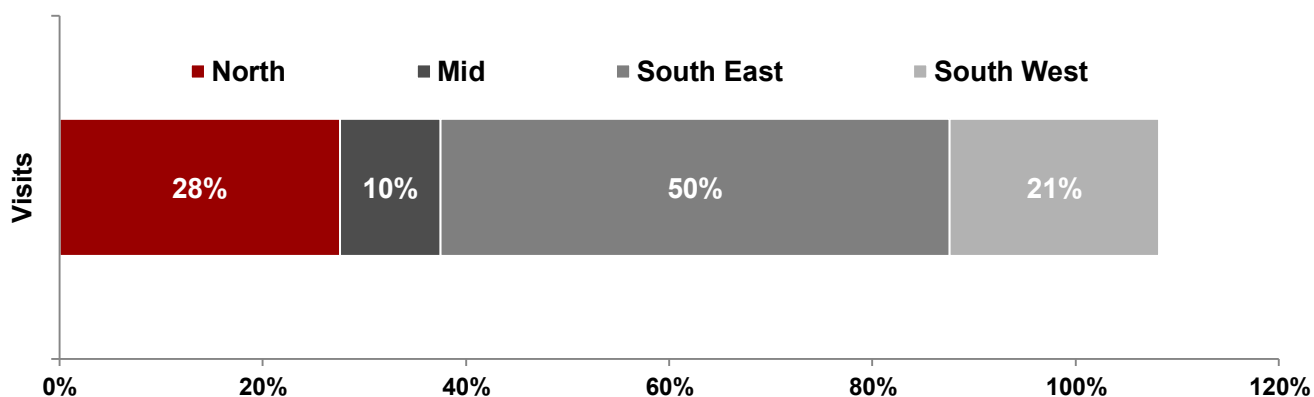
3. International Visitors

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.

Over the period of 2014-2016, South West Wales received an annual average of 205,000 international visits per year. Over this same period these visits have contributed an average of £90 million per year to the Welsh economy. South West Wales received just over a fifth (21 per cent) of all international visits to Wales.

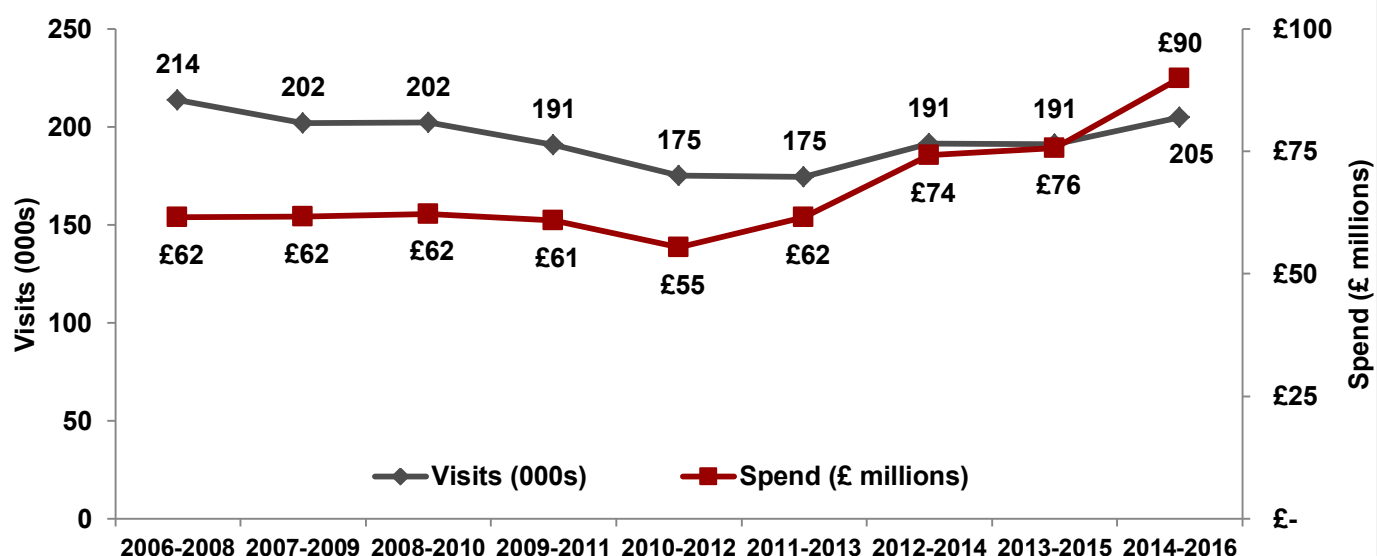
Figure 2.0 Proportion (%) of International Visits to Wales by Welsh Region – Annual Average 2014-2016



**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 West Wales - Three Year Annual Averages

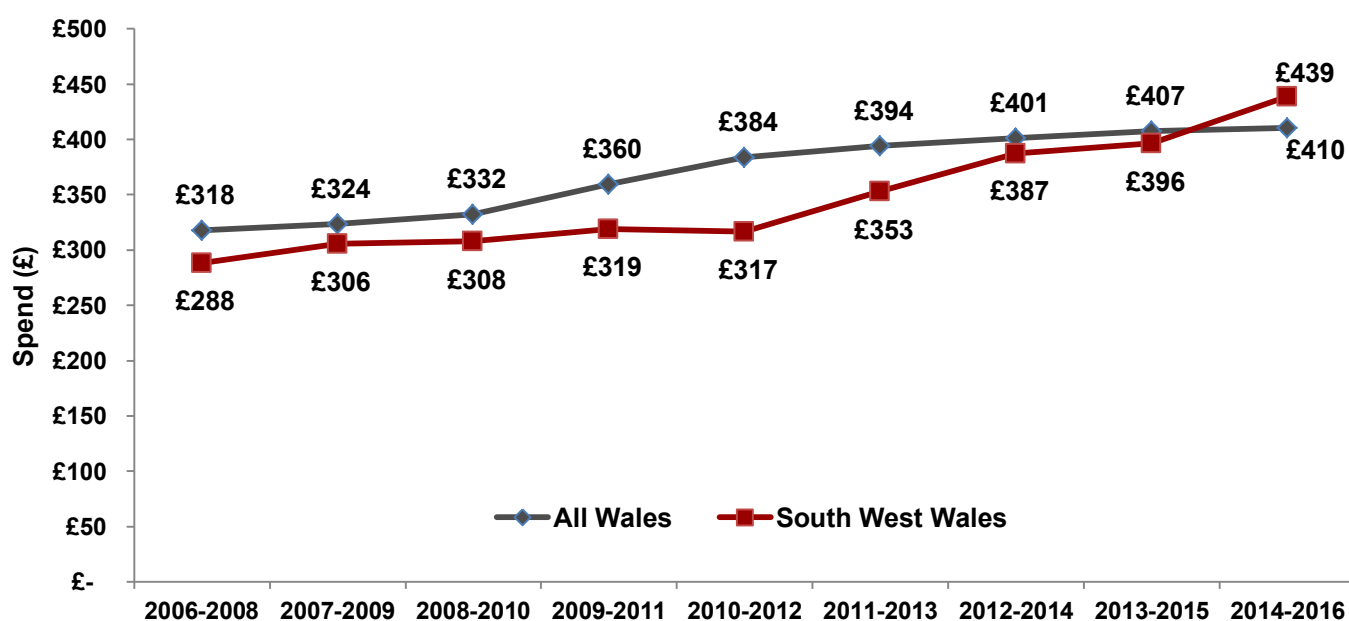


Between 2006-2008 and 2009-2011, the related expenditure from international visits to South West Wales remained steady but decreased in 2010-2012. Nonetheless, after this period it has continuously increased, peaking in 2014-2016 at £90 million.

Volume of international visits to South West Wales between 2012-2014 and 2013-2015 remained unchanged at 175,000, but increased in 2014-2016 to 205,000.

Average Spend per Visit

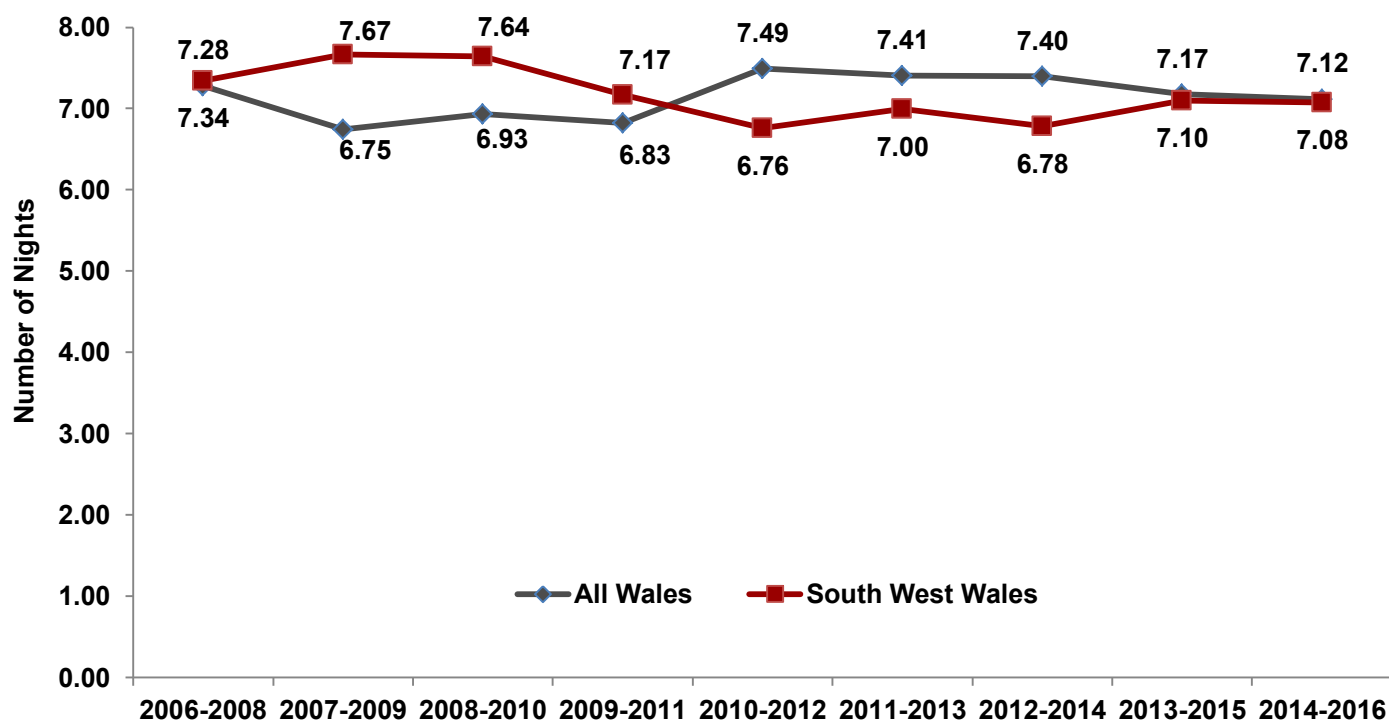
Figure 2.2 Average Spend per International Visit (£) to All Wales and South West Wales- Three Year Annual Averages



Before 2014-2016, the average spend per international visit to South West Wales was consistently below the all Wales average. However, in 2014-2016 it peaked at £349, making South West Wales and Mid Wales the only two Welsh regions to have a higher average spend per international visit than Wales overall (£410).

Average Number of Nights per Visit

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



Between 2006-2008 and 2009-2011, the average number of night per international visit to South West Wales was higher than the all Wales average. On the other hand, between 2010-2012 and 2012-2014 the average for all Wales was higher than South West Wales.

Since 2013-2015, the average number of nights spent by international visitors to both South West Wales and overall Wales have remained similar. In 2014-2016 an international visitor in South West Wales stayed for an average of 7.08 nights, compared to an average of 7.12 nights in Wales as a whole.

Purpose of Trip

Table 2.1 Volume of International Visits (000s) by Purpose of Trip to All Wales and South West Wales – Annual Average 2014-2016

	All Wales	South West Wales
Total Trips	992	205
Holiday	407	92
Business	178	29
Visiting Friends and Relatives	327	69
Other	63	10
Study	17	4

During 2014-2016, just under (45 per cent) of all the international visitors to South West Wales came for a holiday, a higher proportion than the overall Wales average of 41 per cent. In contrast, Mid Wales received 14 per cent of international business visits, below the Wales average of 18 per cent.

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

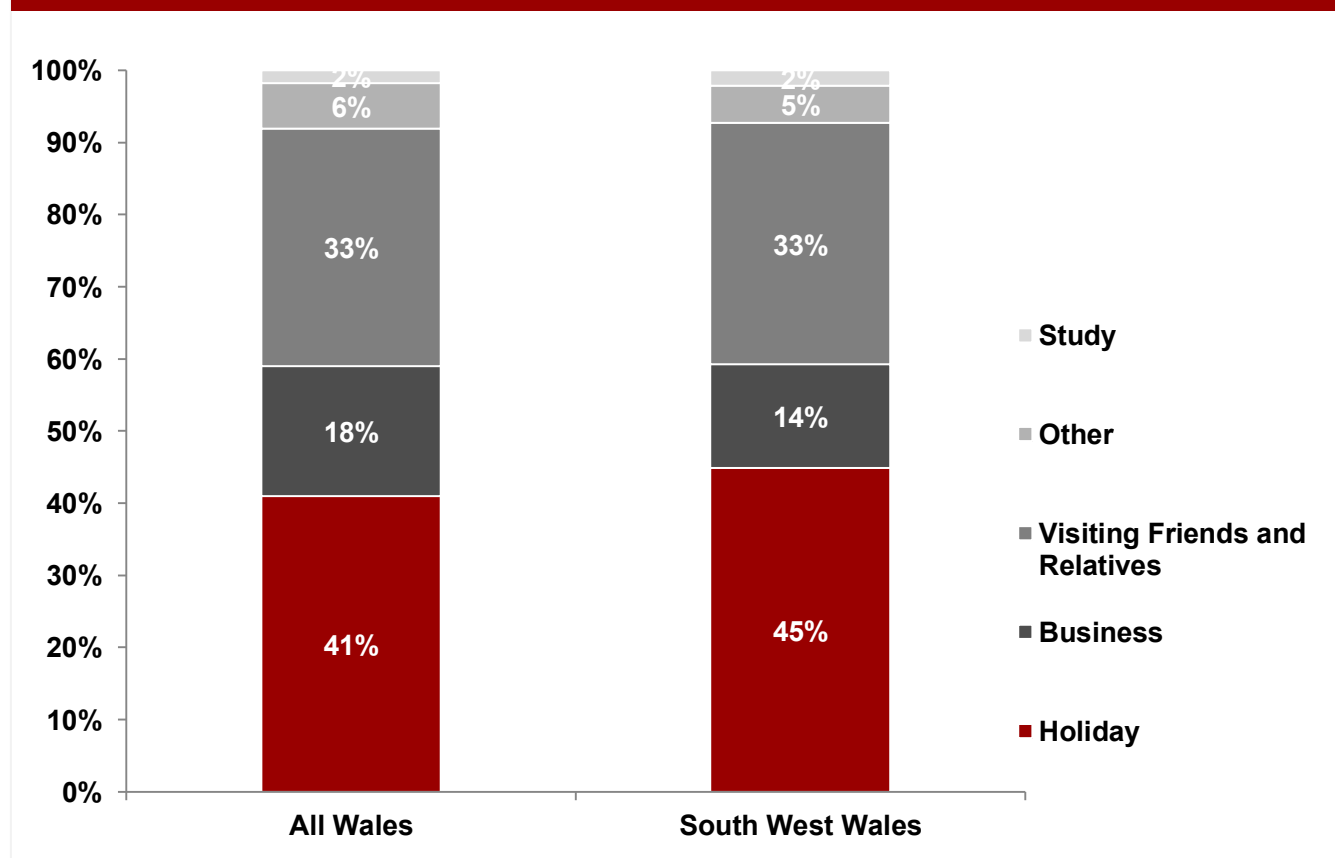
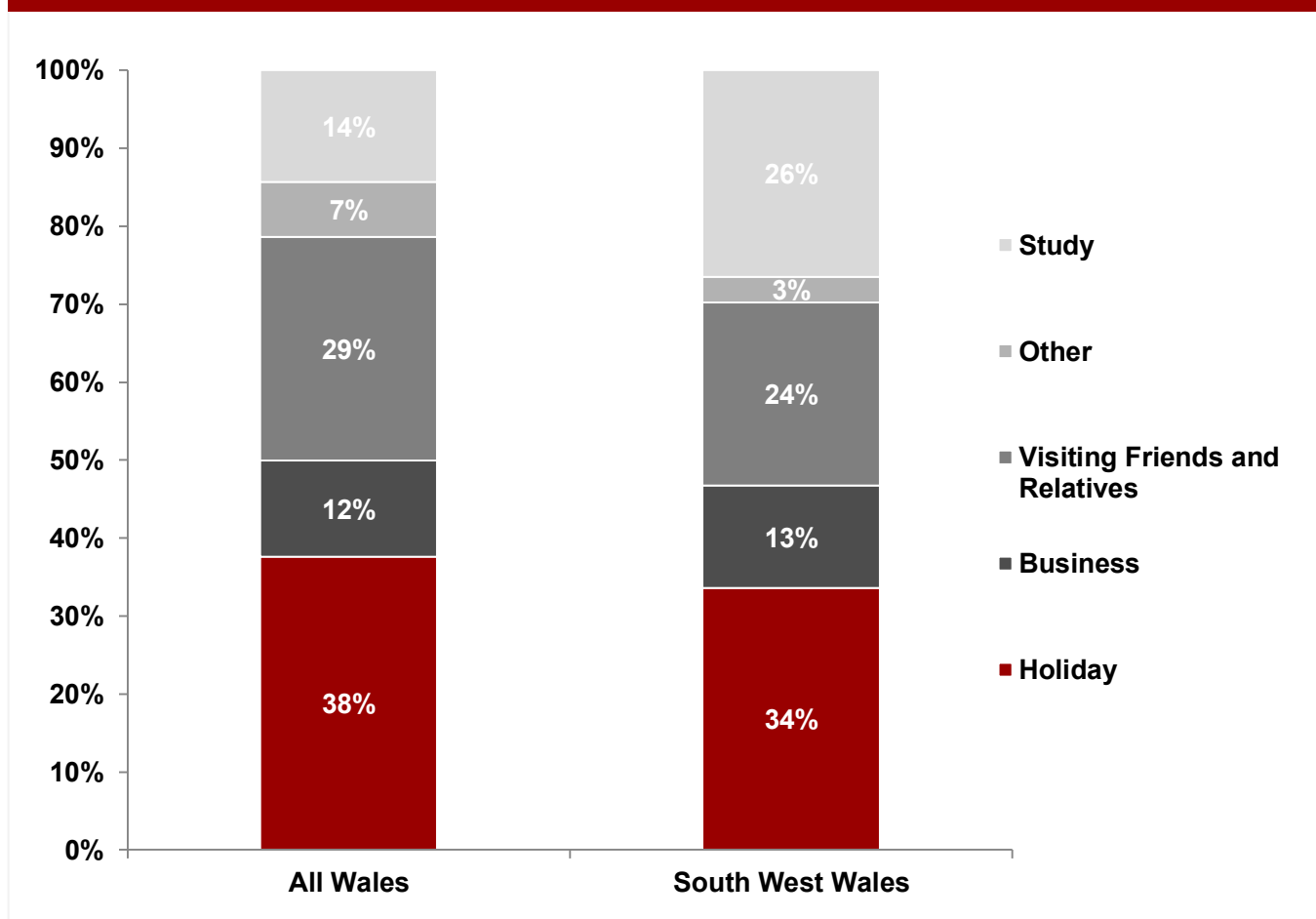


Table 2.2 Related Expenditure (£ millions) of International Visits by Purpose of Trip to All Wales and South West Wales – Annual Average 2014-2016

	All Wales	South West Wales
Total Expenditure	407	90
Holiday	153	30
Business	50	12
Visiting Friends and Relatives	117	21
Other	29	3
Study	58	24

In 2014-2016, international visitors coming to Mid Wales to study contributed to over a quarter (26 per cent, £24 million) of all related expenditure to the region. As demonstrated for all Wales and all four Welsh regions, international visitors coming to study account for a larger proportion of related expenditure than volume of international visits. For example in 2014-2016 the proportion of international visitors arriving to study in South West Wales accounted for only 2 per cent of the total but they contributed to 26 per cent of all related expenditure in South West Wales.

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

All Wales		South West Wales	
All Visits	992	All Visits	205
Ireland	148	Ireland	46
France	103	Germany	24
Germany	94	France	16
USA	89	Netherlands	14
Australia	66	USA	13
Netherlands	64	Spain	10
Spain	55	Australia	10
Poland	49	Italy	9
Canada	31	Poland	8
Italy	30	Canada	6

The most common country of origin for international visitors to South West Wales was Ireland (23 per cent), followed by Germany (12 per cent) and France (8 per cent).

South West Wales had the highest proportion of German visitors of all the Welsh regions. For comparison, the proportion of Irish visitors to South West Wales in 2014-2016 was 23 per cent, while it was 15 per cent for all Wales.

Table 2.4 Proportion (%) of International Visits by Country of Origin to All Wales and South West Wales – Annual Average 2014-2016

All Wales		South West Wales	
All Visits	100%	All Visits	100%
Ireland	15%	Ireland	23%
France	10%	Germany	12%
Germany	9%	France	8%
USA	9%	Netherlands	7%
Australia	7%	USA	6%
Netherlands	6%	Spain	5%
Spain	6%	Australia	5%
Poland	5%	Italy	4%
Canada	3%	Poland	4%
Italy	3%	Canada	3%

Local Authorities Visited

The most visited local authority in South West Wales by international visitors in 2014-2016 was Pembrokeshire with 90,000 visits, followed by Swansea with 80,000 visits.

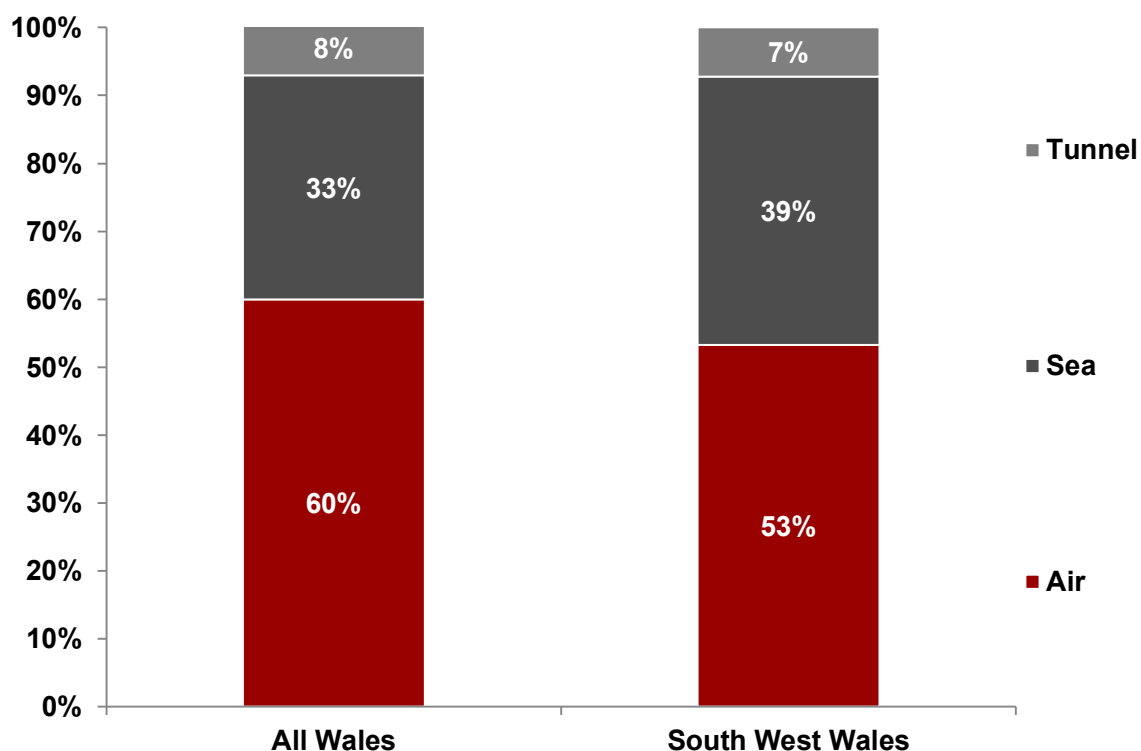
Table 2.5 Volume of International Visits to each Local Authority in South West Wales – Annual Average 2014-2016

	Visits
Pembrokeshire	90,000
Swansea	80,000
Carmarthenshire	24,000
Neath and Port Talbot	16,000

Mode of Transport Used

In 2014-2016, international visitors were most likely to travel to South West Wales by air (53 per cent). Compared to Wales overall, South West Wales had a higher proportion of international visitors arriving by sea (33 per cent and 39 per cent respectively).

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



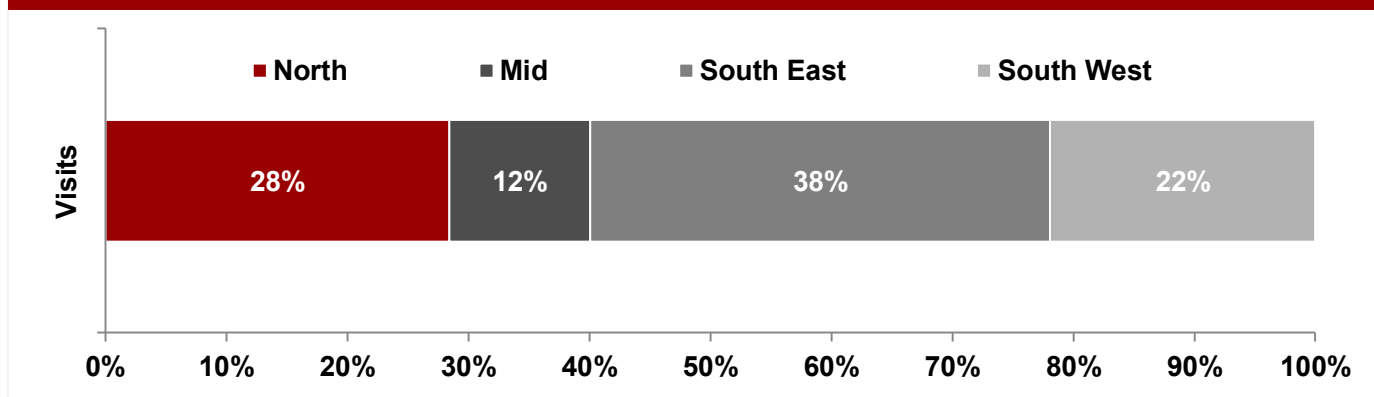
4. Tourism Day Visits

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.

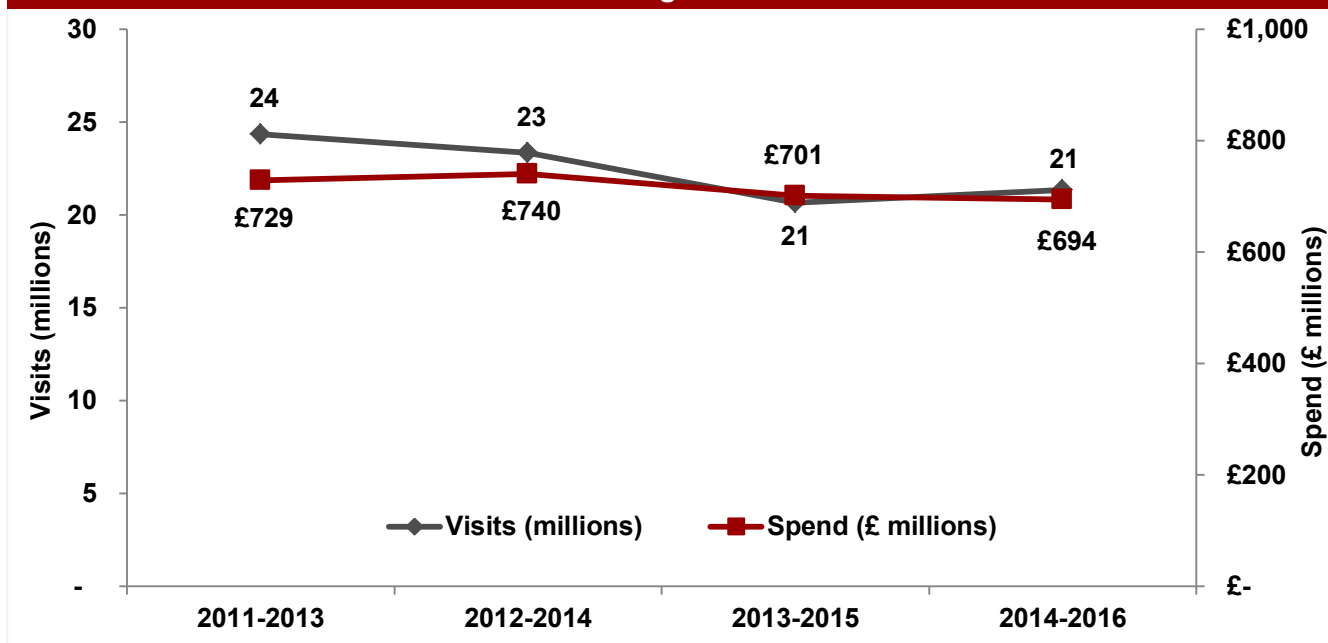
During 2014-2016, South West Wales received an annual average of 21 million Tourism Day visits with a related expenditure of £694 million. South West Wales was responsible for 22 per cent of all Tourism Day visits to Wales.

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



Tourism Day Visits and Related Expenditure

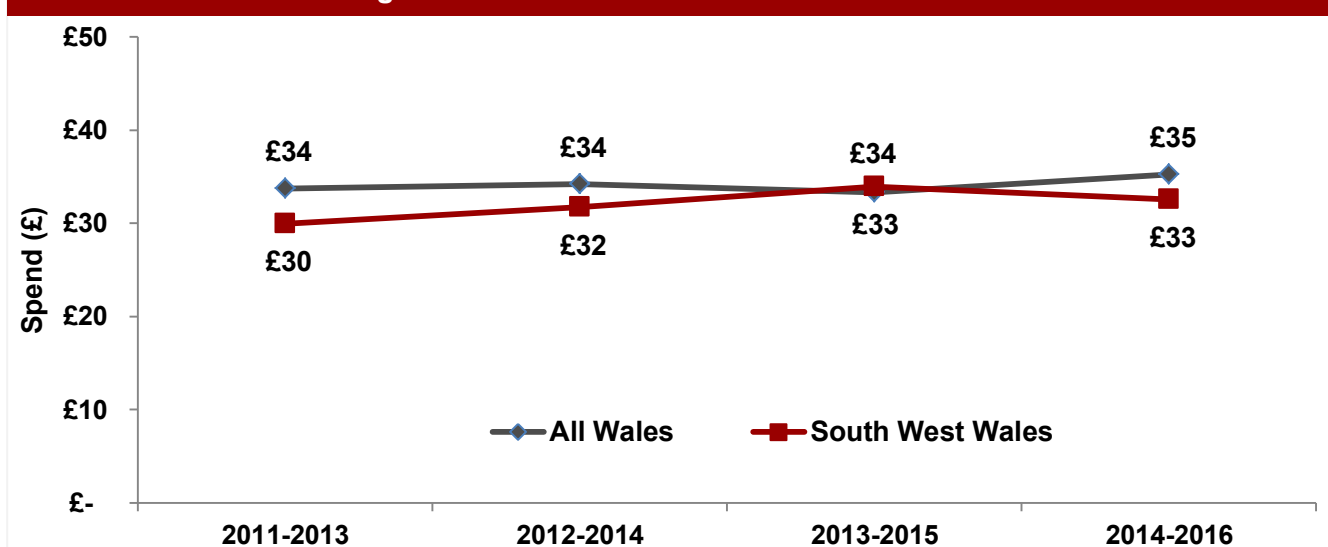
Figure 2.8 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) to South West Wales - Three Year Annual Averages



The volume of Tourism Day visits to South West Wales between 2013-2015 and 2014-2016 has remained constant at 21 million, while related expenditure has decreased slightly from £701 million to £694.

Average Spend per Visit

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



Average spend per Tourism Day visit to South West Wales between 2013-2015 and 2014-2016 has remained unchanged at £33, just under the overall Wales average of £35 in 2014-2016.

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 West Wales – Annual Average 2014-2016

All Wales			South West Wales		
All Visits	97.3	100%	All Visits	21.3	100%
Visiting friends or family	19.8	20%	Visiting friends or family	4.6	21%
Going out for a meal	10.5	11%	Going out for a meal	2.5	12%
Outdoor activities	9.1	9%	Outdoor activities	2.3	11%
General day out	7.1	7%	General day out	2.2	10%
Going on a night out	6.9	7%	Going on a night out	1.9	9%
Special shopping	6.2	6%	Special shopping	1.3	6%
Going out for entertainment	4.7	5%	Going out for entertainment	1.4	6%
Watching live sporting events	3.6	4%	Watching live sporting events	0.9	4%
Taking part in sports	3.4	3%	Taking part in sports	0.1	1%
Other day out for leisure	3.3	3%	Other day out for leisure	1.0	5%
Going to visitor attractions	3.3	3%	Going to visitor attractions	1.0	5%
Other leisure/ hobbies	2.9	3%	Other leisure/ hobbies	0.7	3%
Special personal events	2.5	3%	Special personal events	0.8	4%
Special public events	1.9	2%	Special public events	0.3	2%
Day out to health/beauty spa	0.7	1%	Day out to health/beauty spa	0.2	1%

Just over a fifth (21 per cent) of Tourism Day visitors to South West Wales, 4.6 million, visited friends or family in 2014-2016, making it the most popular activity undertaken on a Tourism Day visit to this region, a similar proportion to that of the all Wales average of 20 per cent. In addition, South West Wales had a higher proportion than all Wales for Tourism Day visits on a general day out (10 per cent and 7 per cent respectively).

Type of Place Visited

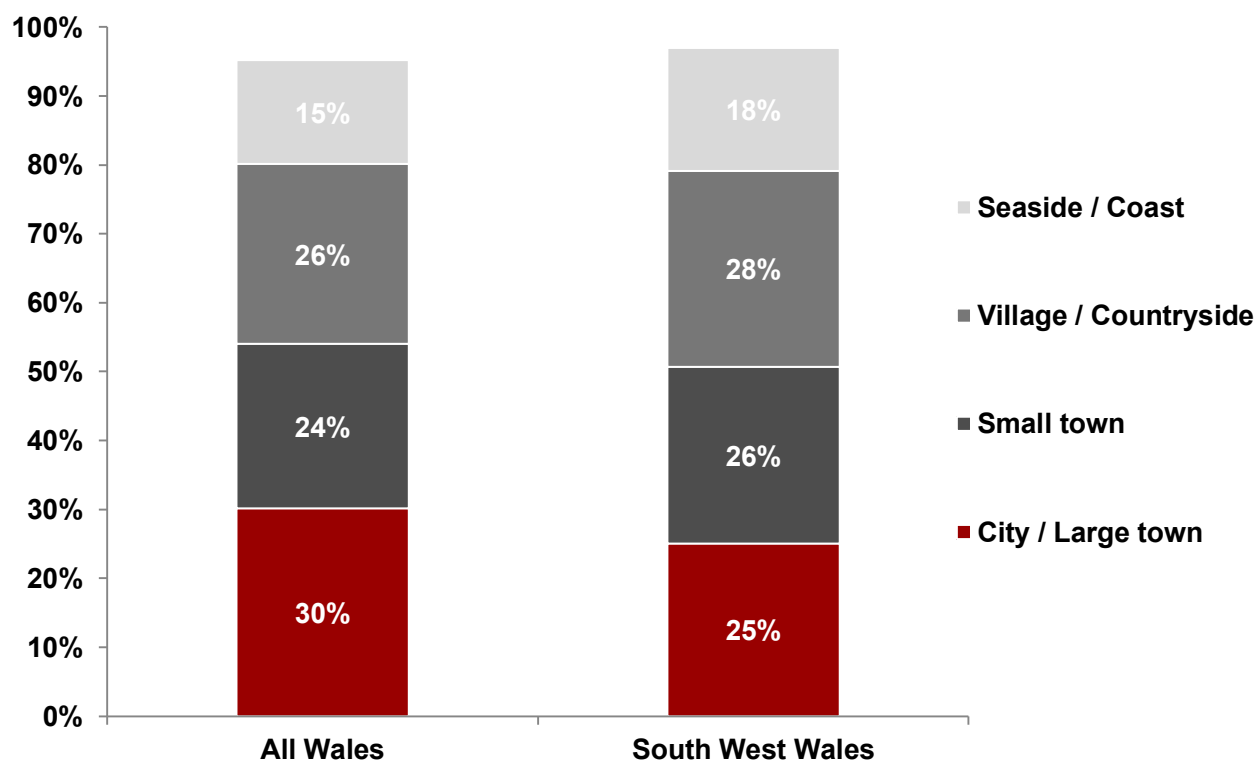
Table 2.7 Volume of Tourism Day Visits (millions) by Type of Place Visited to All Wales and South West Wales – Annual Average 2014-2016

	All Wales	South West Wales
Total Visits	97	21
City / Large town	29	5
Small town	23	5
Village / Countryside	25	6
Seaside / Coast	15	4

During 2014-2016 in South West Wales, the type of location most visited on a Tourism Day visit was the village/countryside, with 6 million (28 per cent) Tourism Day visitors choosing this kind of place. On the other hand, over half (55 per cent) of overnight domestic GB trips to South West Wales was to the seaside (see [Figure 1.8](#)).

Furthermore, South West Wales had a smaller proportion than for Wales overall for Tourism Day visits to a city or large town (25 per cent and 30 per cent respectively).

Figure 3.0 Proportion (%) of Tourism Day Visits to All Wales and South West 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

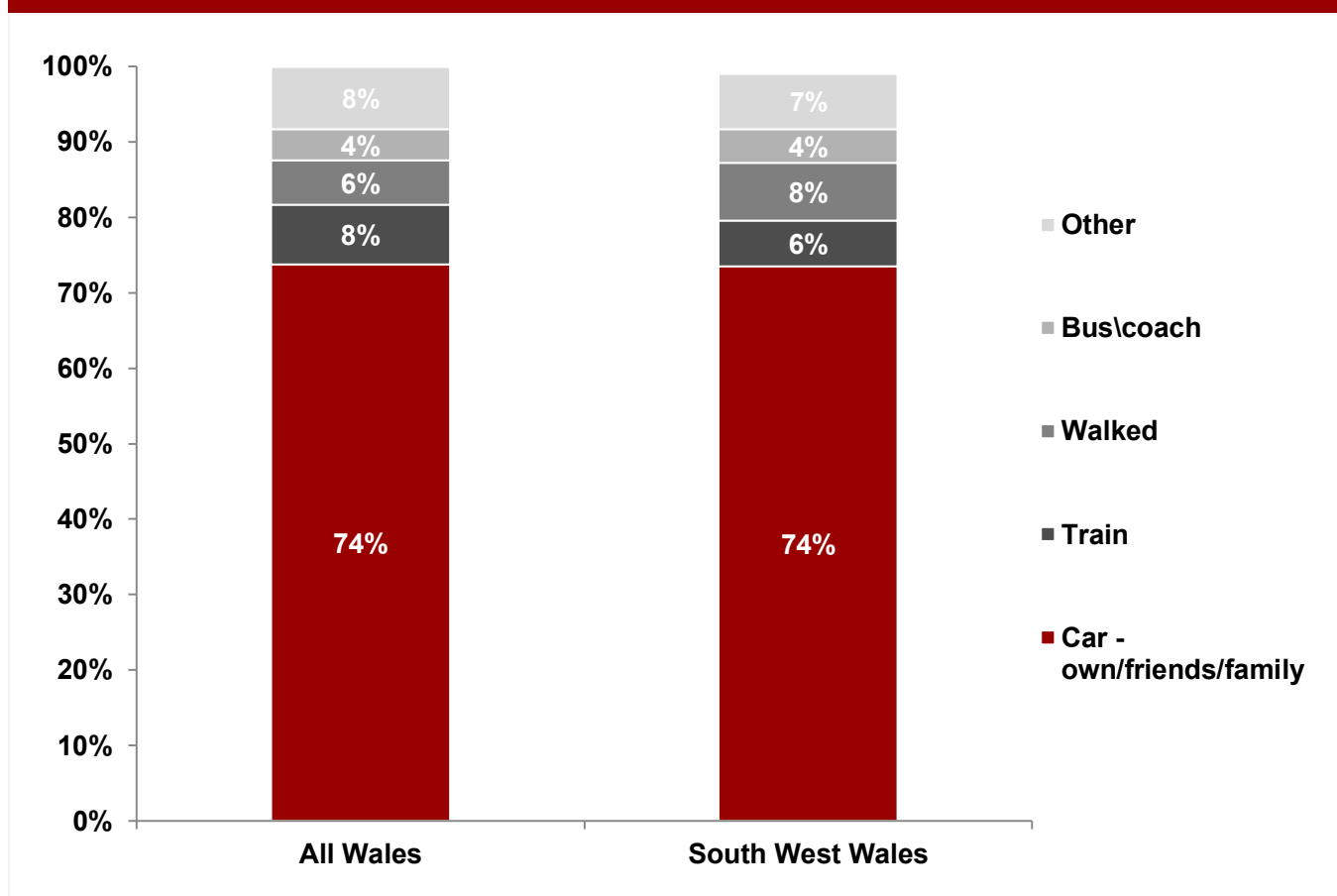
Table 2.8 Volume of Tourism Day Visits (millions) by Mode of Transport to All Wales and South West Wales – Annual Average 2014-2016

	All Wales	South West Wales
Total Visits	97	21
Car - own/friends/family	72	16
Train	8	1
Walked	6	2
Bus\coach	4	1
Other	8	2

Like all the other regions in Wales, the car is the most preferred mode of transportation in South West Wales, with the majority (74 per cent) of Tourism Day visitors choosing to travel this way.

As seen in Figure 3.1, the proportions of mode of transport used on a Tourism Day visit to South West Wales and for all Wales are nearly identical.

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



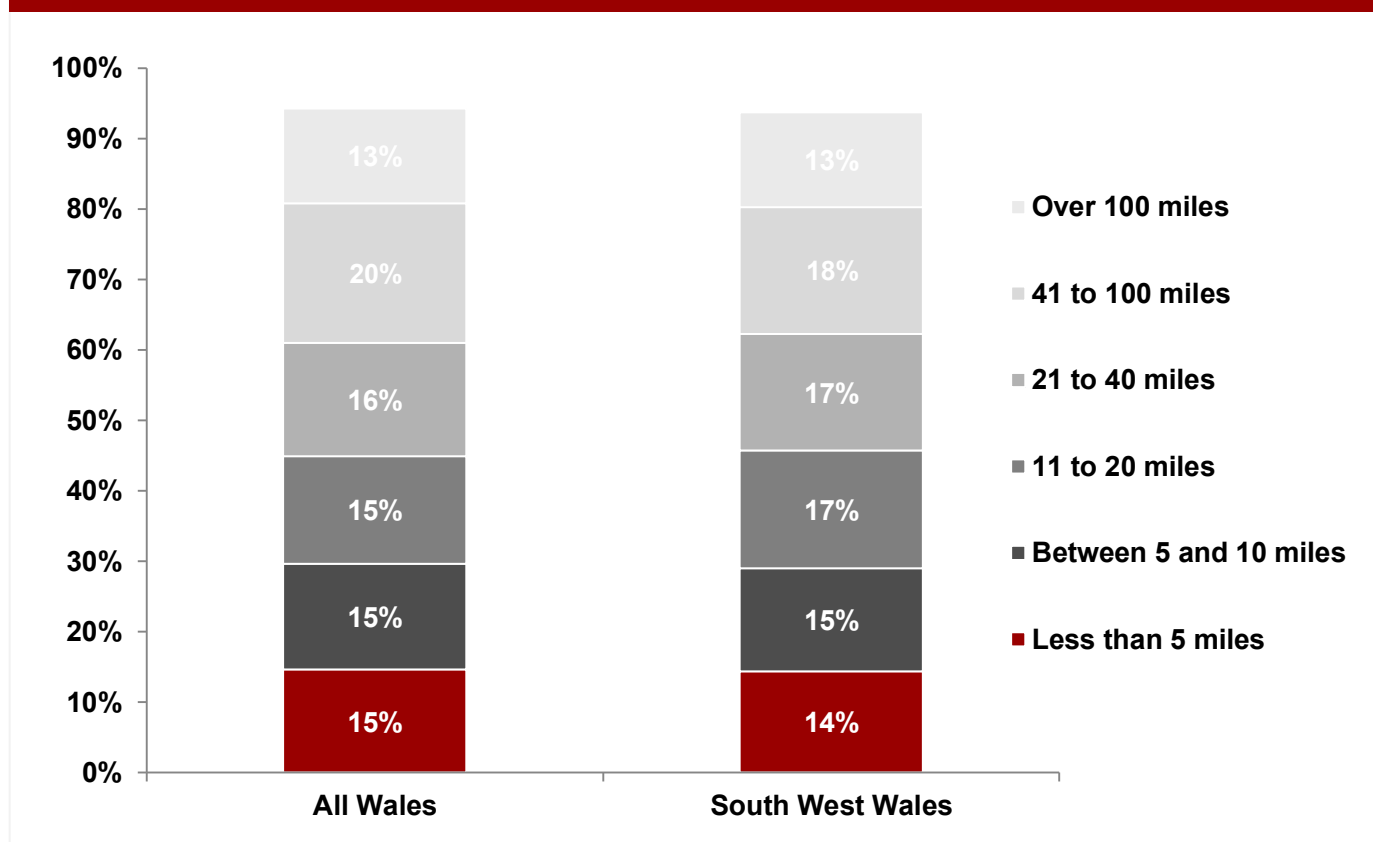
Distance Travelled

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

	All Wales	South West Wales
Total Visits	97	21
Less than 5 miles	14	3
Between 5 and 10 miles	15	3
11 to 20 miles	15	4
21 to 40 miles	16	4
41 to 100 miles	19	4
Over 100 miles	13	3

The majority of Tourism Day visitors to South West Wales (18 per cent) and all Wales (20 per cent) in 2014-2016 travelled between 41 to 100 miles.

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



Region of Residence

During 2014-2016, the majority of Tourism Day visitors in all four regions originated from the Welsh region in question. For example over half of the Tourism Day visits to South West Wales originated from South West Wales itself (52 per cent).

The second most common region of origin of Tourism Day visits to South West Wales in 2014-2016 was South East Wales (14 per cent) with an average of 3.00 million Tourism Day visitors (14 per cent) residing in this area.

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

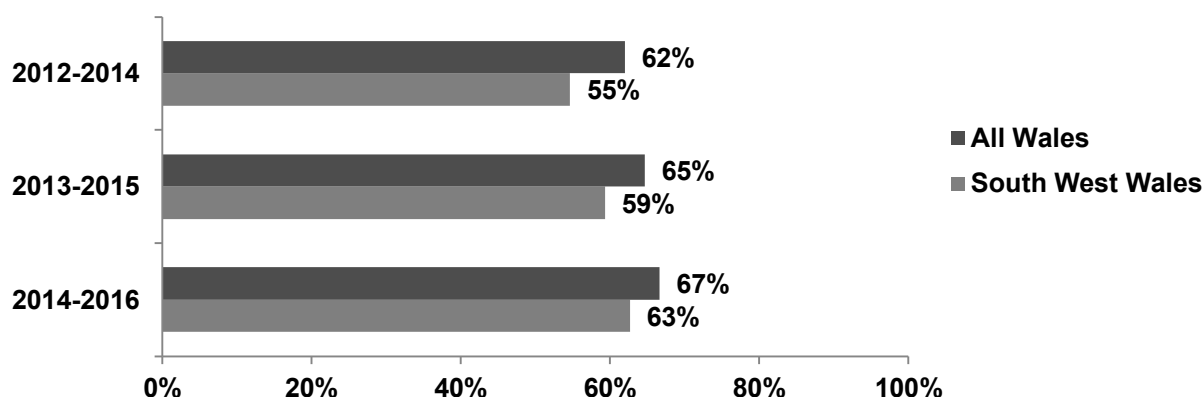
	South West Wales	
All Visits	21	100%
South West Wales	11.15	52%
South East Wales	3.00	14%
South West England	1.12	5%
Mid Wales	1.04	5%
East of England	0.81	4%
West Midlands	0.79	4%
East Midlands	0.71	3%
South East England	0.56	3%
London	0.51	2%
Yorkshire and The Humber	0.43	2%
North East England	0.18	1%
North West England	0.17	1%
Scotland	0.11	1%
North Wales	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

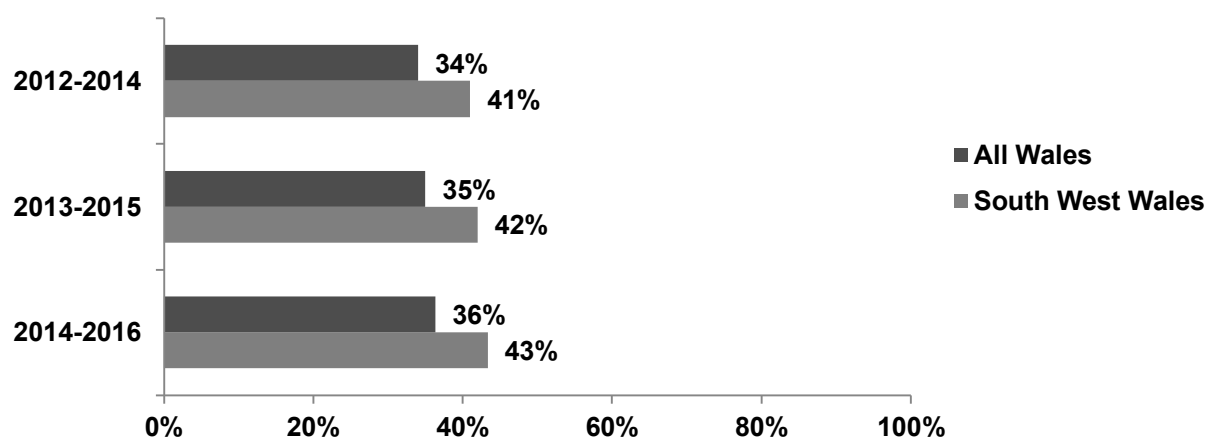
Figure 3.3 Three Year Annual Average Hotel Room Occupancy Rates for All Wales and South West Wales



Hotel room occupancy rates in South West Wales have continuously increased over the years, reaching 63 per cent in 2014-2016. However this was below the all Wales average of 67 per cent.

Guesthouses and B&Bs

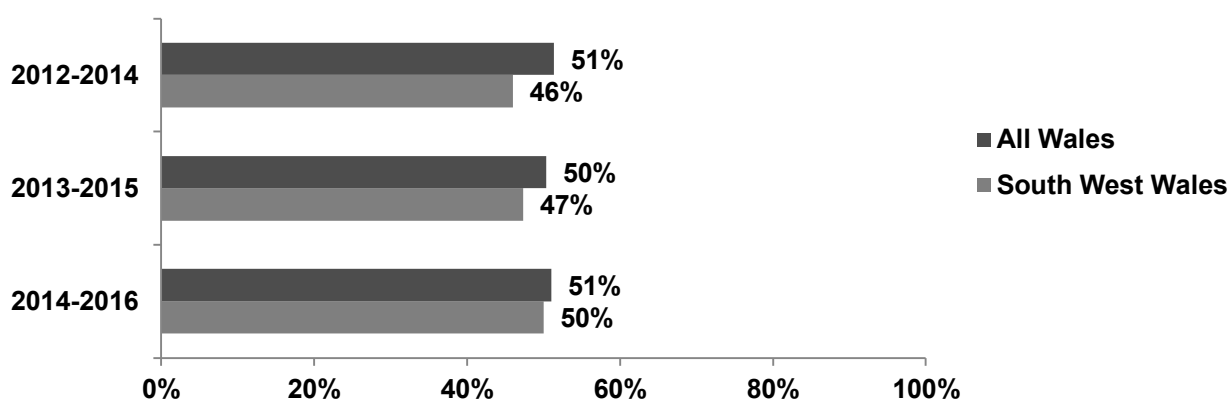
Figure 3.4 Three Year Annual Average Guesthouse and B&B Room Occupancy Rates for All Wales and South West Wales



Even though Guesthouse/B&B room occupancy rates have only slightly increased since 2012-2014, South West Wales had the highest rate of all the Welsh regions in 2014-2016 at 43 per cent. In comparison, the all Wales average during the same period was 36 per cent.

Self-Catering

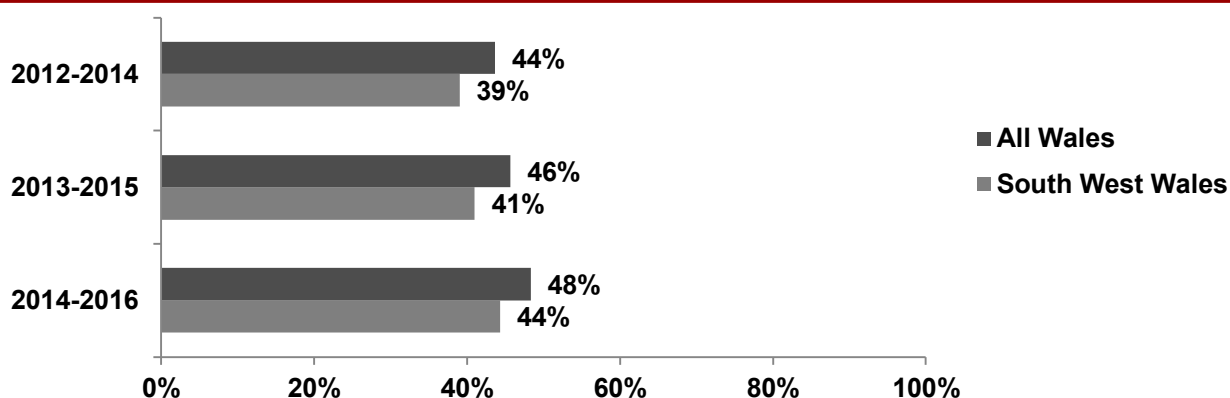
Figure 3.5 Three Year Annual Average Self-Catering Unit Occupancy Rates for All Wales and South West Wales



Following slight increases over the years, Self-Catering unit occupancy rates for South West Wales in 2014-2016, at 50 per cent, remain close to that of the all Wales average of 51 per cent.

Hostels

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



Of all the Welsh regions, South West Wales, along with South East Wales, had the lowest Hostel occupancy rates in Wales for 2014-2016. In comparison, the Wales average during this period was 48 per cent, while the South West Wales average was 44 per cent.

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 36 per cent of all accommodation establishments and 27 per cent of all bedspaces in Wales. The dominant type of accommodation establishment in both South West Wales (3,066) and all Wales (7,067) was self-catering, while the majority of bedspaces were Caravan/Camping (104,469 and 399,124 respectively).

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

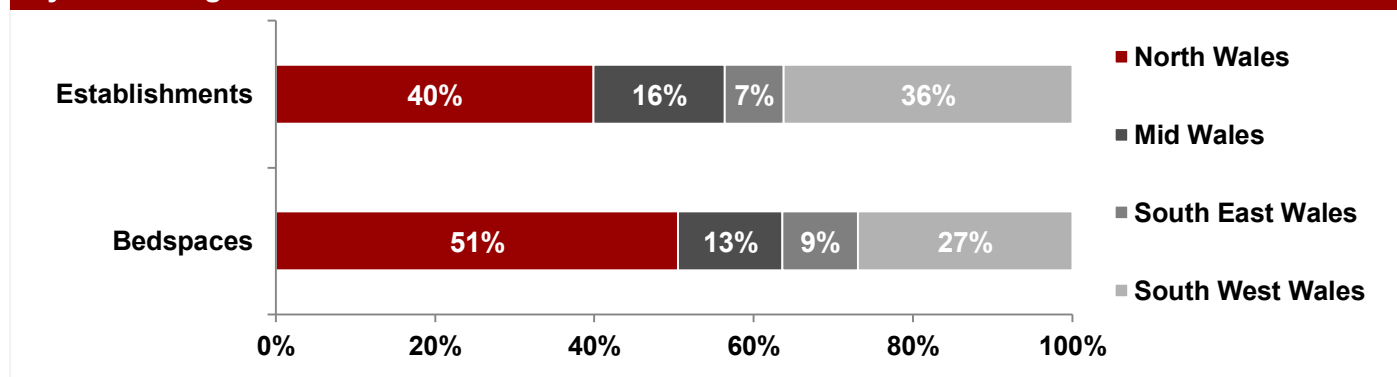
*Includes nomadic structures such as tipis and yurts, as well as Romany caravans.

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

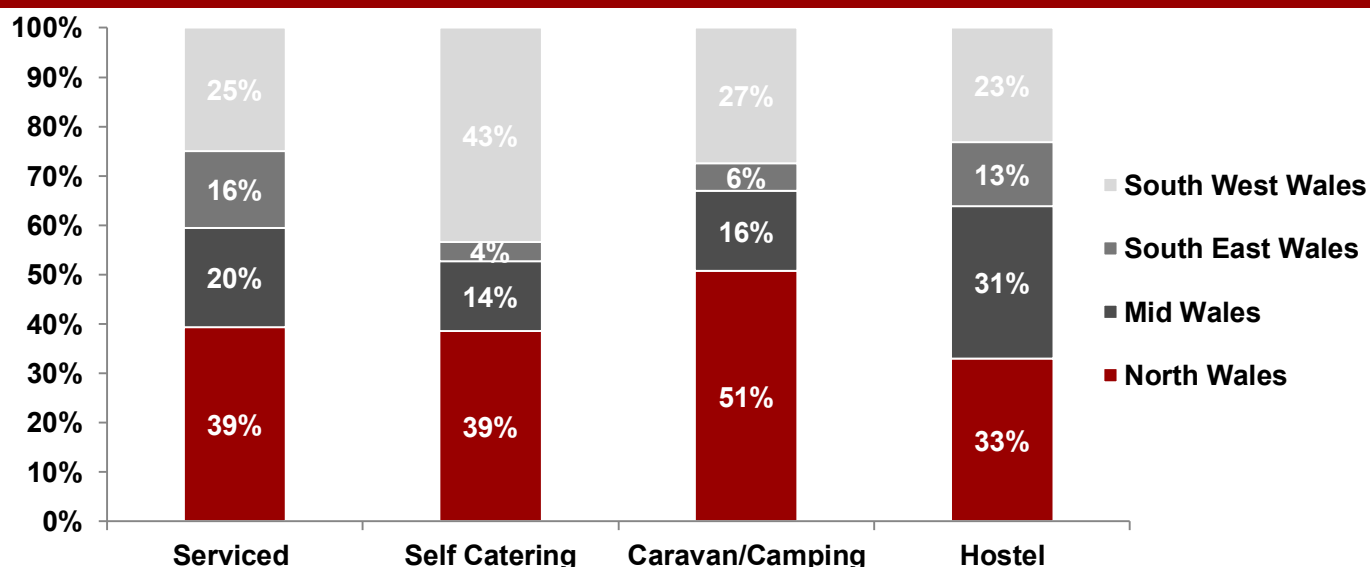
*Includes nomadic structures such as tipis and yurts, as well as Romany caravans.

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



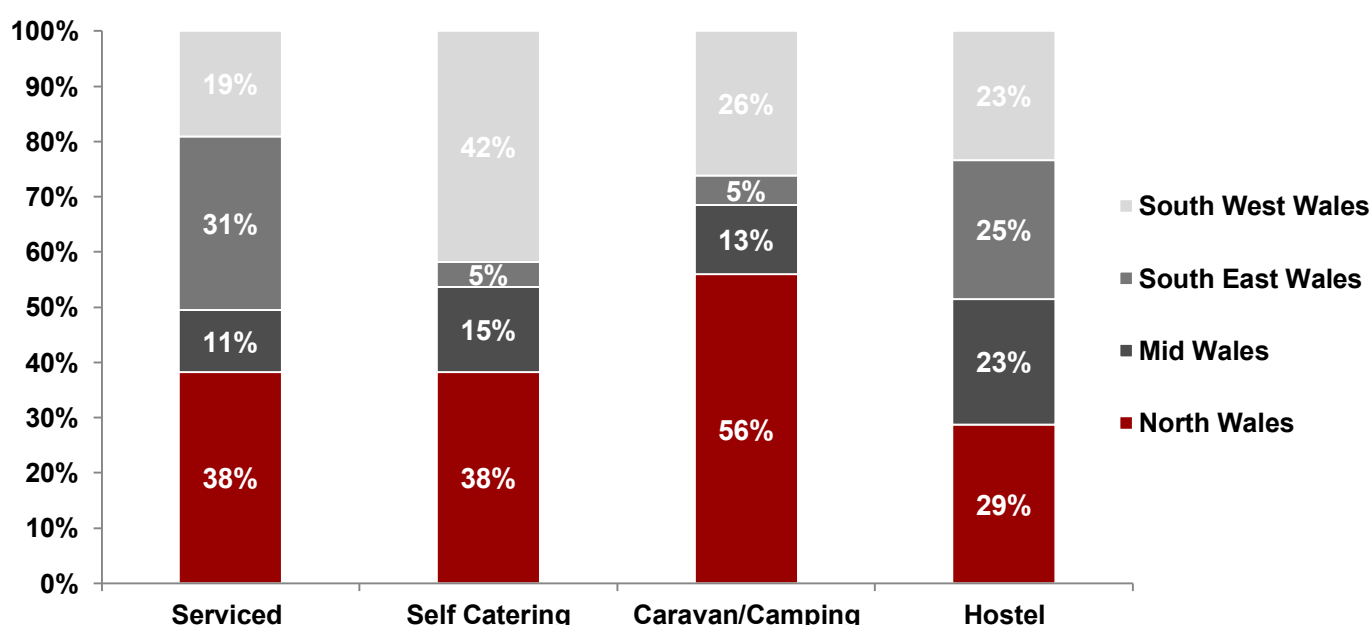
In addition, as seen in in Figure 3.8, a quarter (25 per cent) of serviced accommodation, 27 per cent of caravan/camping and over a fifth (23 per cent) of hostel establishments in Wales are found in South West Wales. Furthermore, the majority (43 per cent) of the self-catering accommodation establishments in Wales are based in South West 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 West Wales for Self Catering, Caravan/Camping and Hostel are similar to those for establishments. For example South West Wales had 43 per cent of all Self Catering establishments and 42 per cent of Self Catering bedspaces in Wales. In contrast, South West Wales had a smaller proportion of serviced bedspaces (19 per cent) than serviced establishments (25 per cent).

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

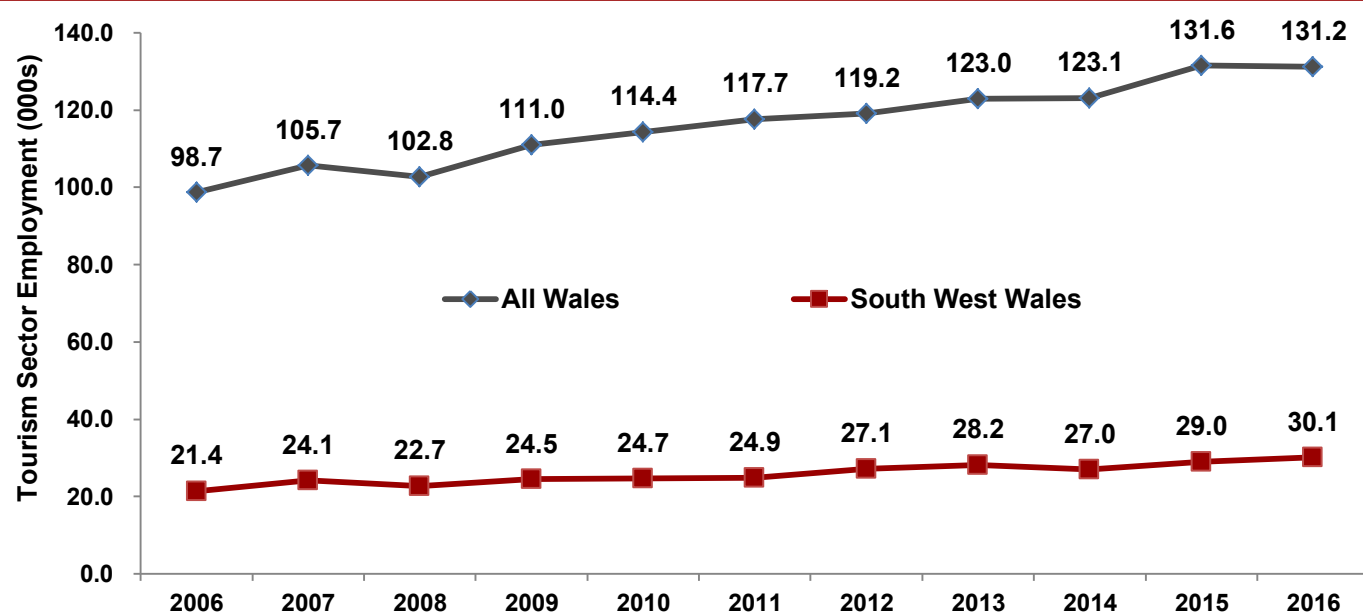


7. Tourism Sector Employment

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

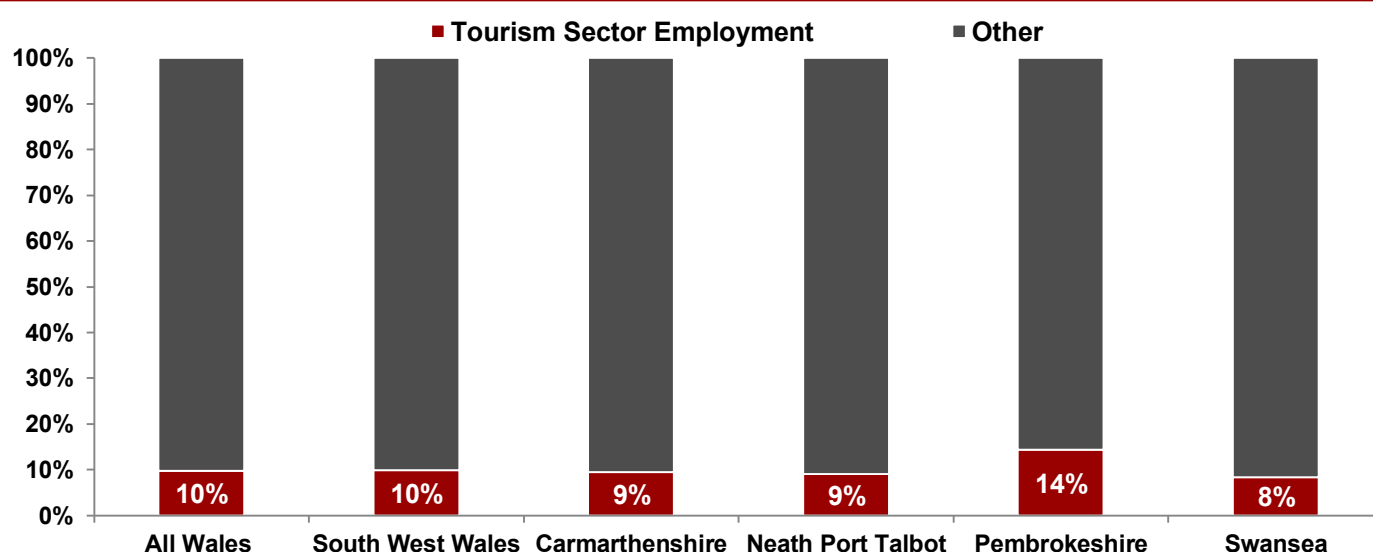
Although Wales experienced a slight decrease in the number of those employed in the Tourism Sector, from 131,600 in 2015 to 131,200 in 2016, South West Wales increased its tourism sector employment from 29,000 to 30,100.

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



In 2016, South West Wales and all Wales had the same proportion, 10 per cent, of the workforce employed in the Tourism Sector. Particularly the proportion of those employed in the Tourism Sector in Pembrokeshire, at 14 per cent, was even higher than the all Wales and South West Wales average.

Figure 4.1 Proportion (%) of Tourism Sector Employment compared to all all employment in Wales, South West Wales and in each Local Authority in South West Wales - 2016



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 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	387

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	