

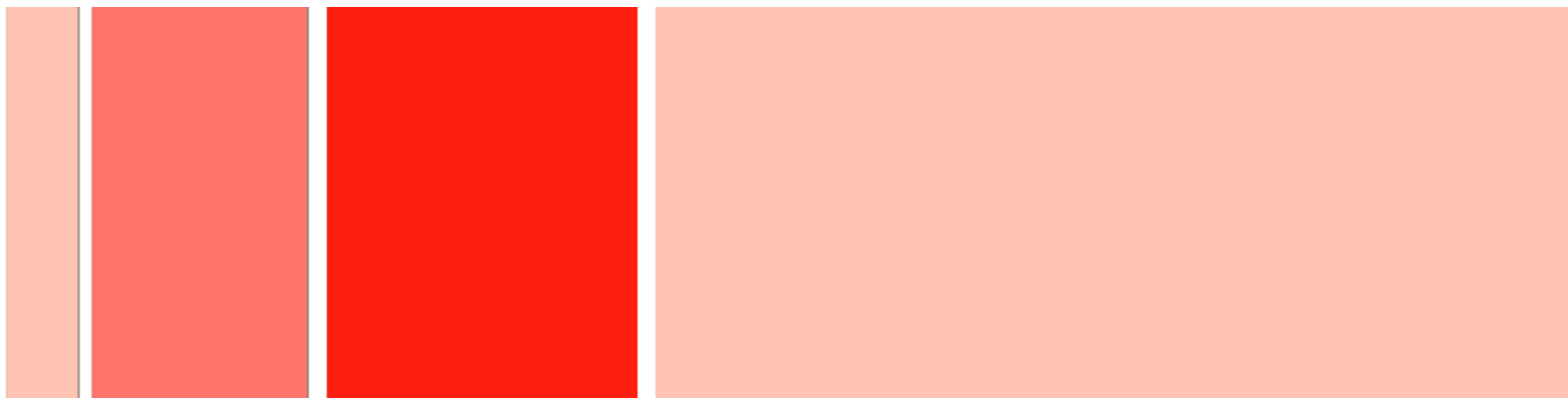
SOCIAL RESEARCH NUMBER:

48/2018

PUBLICATION DATE:

23/08/2018

# Tourism Profile – North Wales 2014 - 2016



Title: Tourism Profile – North Wales 2014 - 2016

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

Researcher: Birgitte Magnussen

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

For further information please contact:

Birgitte Magnussen

Visit Wales

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

0300 062 5296

Email: [birgitte.magnussen@gov.wales](mailto:birgitte.magnussen@gov.wales)

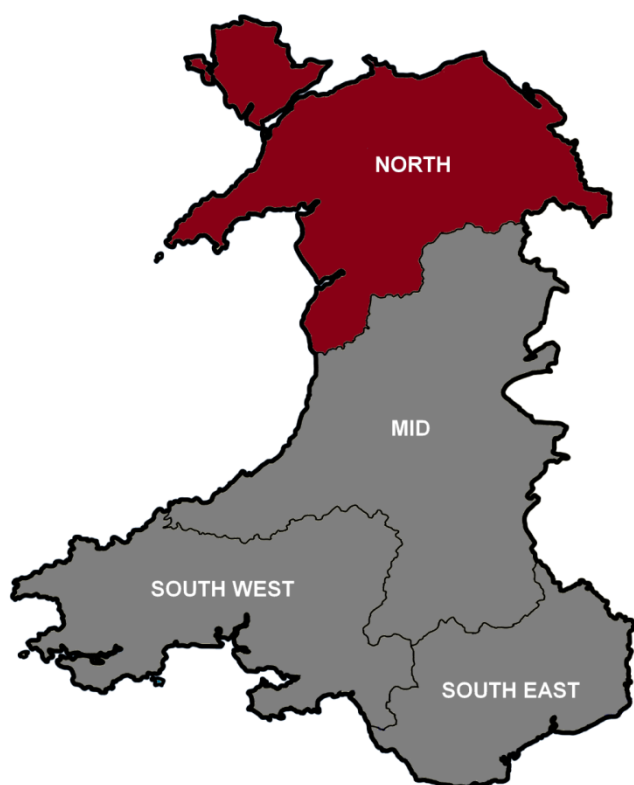
This factsheet contains tourism related data for the North Wales region for the period 2014-2016 providing comparisons with the overall GB level, all-Wales level and the other regions of Wales. Please refer to the other three Wales regional tourism factsheets also and the local authority factsheet for comparative information. Please note that the data is presented using 3-year rolling annual averages, as the sample sizes of the various tourism surveys used to compile this profile would be too small to give statistically reliable data for each region on an annual basis.

The factsheet contains 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.

## **Table of Contents**

<b>1. <a href="#"><u>Overview and Key Points</u></a></b>	<b>3</b>
<b>2. <a href="#"><u>Overnight Domestic Great Britain Visitors</u></a></b>	<b>4</b>
<b>3. <a href="#"><u>International Visitors</u></a></b>	<b>15</b>
<b>4. <a href="#"><u>Tourism Day Visits</u></a></b>	<b>23</b>
<b>5. <a href="#"><u>Accommodation Occupancy Rates</u></a></b>	<b>30</b>
<b>6. <a href="#"><u>Bedstock</u></a></b>	<b>32</b>
<b>7. <a href="#"><u>Tourism Sector Employment</u></a></b>	<b>34</b>
<b>8. <a href="#"><u>Appendix</u></a></b>	<b>35</b>

## 1. Overview and Key Points



During 2014-2016, North Wales accounted for 37 per cent of all overnight domestic GB trips and 28 per cent of both international visits and Tourism Day visits to Wales.

The annual average volume of all tourism types (overnight domestic GB trips, international visits and Tourism Day visits) to North Wales between 2013-2015 and 2014-2016 increased by 4 per cent to 31,556 thousand, while related tourism expenditure increased by a considerable 10 per cent to £1,779 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](#)*

The annual average of overnight domestic GB trips to North Wales between 2013-2015 and 2014-2016 decreased by 2 per cent to 3,626 thousand, whereas related expenditure remained unchanged at £639

million. A similar trend was seen in all Wales over the same period, with a decrease of 2 per cent in the volume of trips to 9,919 thousand and related expenditure staying the same at £1,800 million.

*Please refer to [Table 1.1](#)*

Between 2013-2015 and 2014-2016, the annual average volume of international visits to North Wales increased by 8 per cent to 274,000 visits. Moreover, related expenditure increased by 7 per cent to £88 million. For comparison, during the same period, the volume of international visits to all Wales 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](#)*

Although the annual average volume of Tourism Day visits to all Wales between 2013-2015 and 2014-2016 remained unchanged at 97 million, in North Wales it increased by 5 per cent to 28 million. Furthermore over the same period in all Wales, related expenditure increased by 6 per cent to £3,432 million, whereas for North Wales it increased by 18 per cent to £1,052 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
<b>North Wales</b>	<b>1,611</b>	<b>1,779</b>	<b>+10</b>
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
<b>North Wales</b>	<b>3,713</b>	<b>3,626</b>	<b>-2</b>
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
<b>North Wales</b>	<b>639</b>	<b>639</b>	<b>0</b>
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
<b>North Wales</b>	<b>253</b>	<b>274</b>	<b>+8</b>
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
<b>North Wales</b>	<b>82</b>	<b>88</b>	<b>+7</b>
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
<b>North Wales</b>	<b>26</b>	<b>28</b>	<b>+5</b>
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
<b>North Wales</b>	<b>889</b>	<b>1,052</b>	<b>+18</b>
Mid Wales	354	307	-13
South East Wales	1,379	1,533	+11
South West Wales	701	694	-1

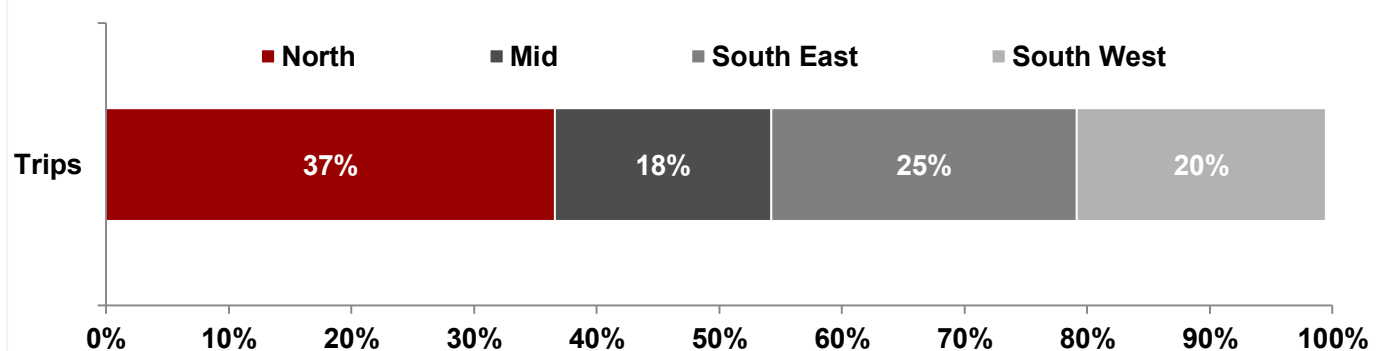
Source: Great Britain Day Visits Survey

## 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.

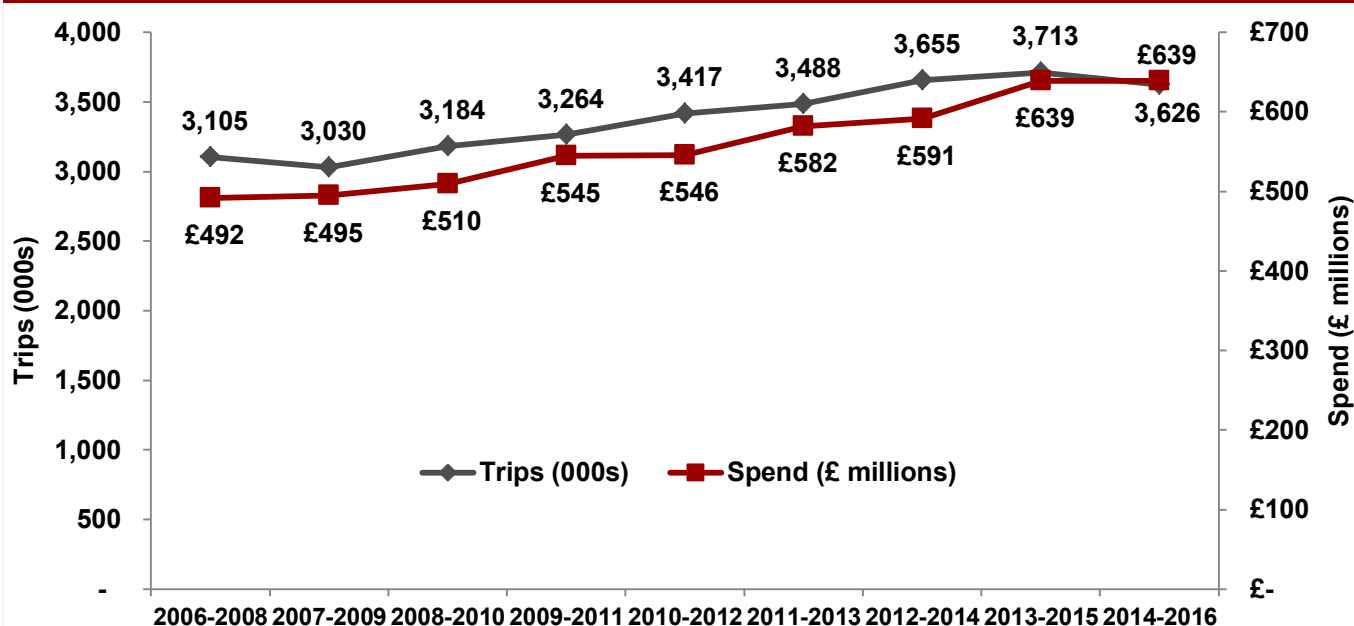
Over the period of 2014-2016 North Wales received an annual average of 3,626,000 overnight domestic GB trips per year. Over this same period these trips have contributed £639 million per year to the Welsh economy. North Wales received 37 per cent of all overnight domestic GB trips to Wales making it the most popular Welsh region for this kind of tourism.

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



## Volume of Trips and Related Expenditure

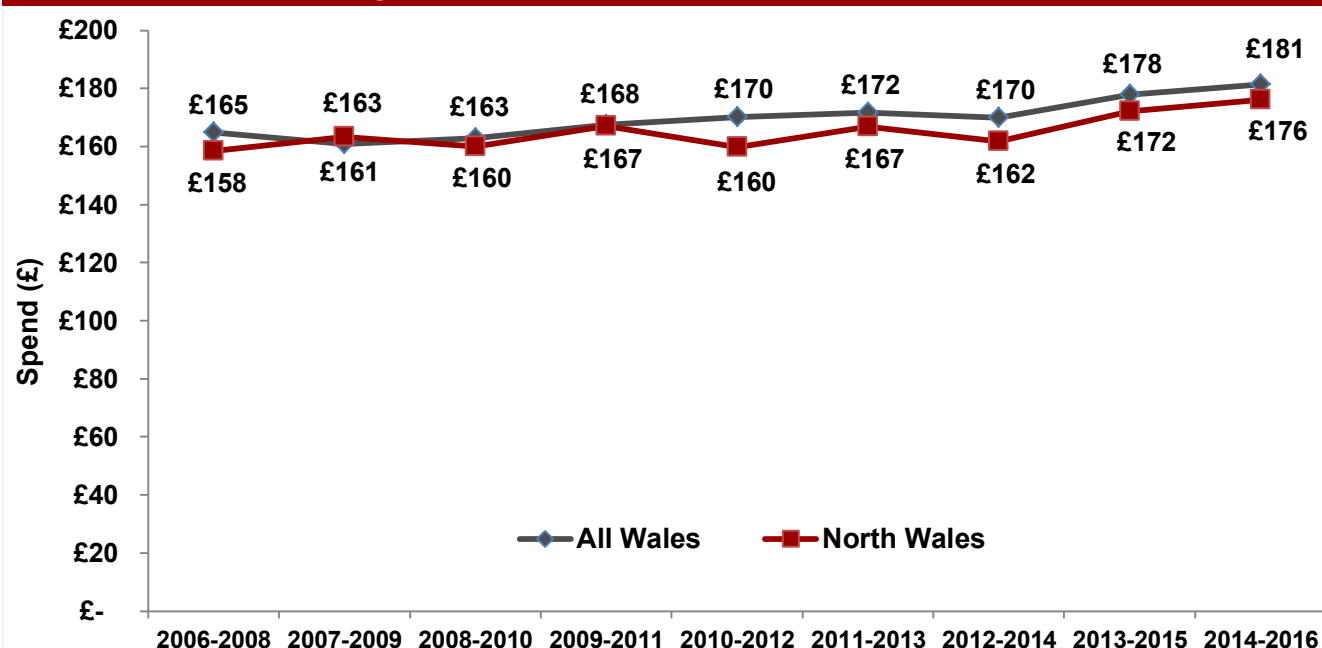
**Figure 1.1 Overnight Domestic GB Trips (000s) and Related Expenditure (£ millions) to North Wales - Three Year Annual Averages**



Between 2006-2008 and 2013-2015 there was a continuous increase in the annual average volume of overnight domestic GB trips and related expenditure to North Wales. Related expenditure between 2013-2015 and 2014-2016 have remained unchanged at £639 million. On the other hand, over the same period, the annual average volume of overnight domestic GB trips decreased slightly from 3,713 thousand to 3,626 thousand.

## Average Spend per Trip

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

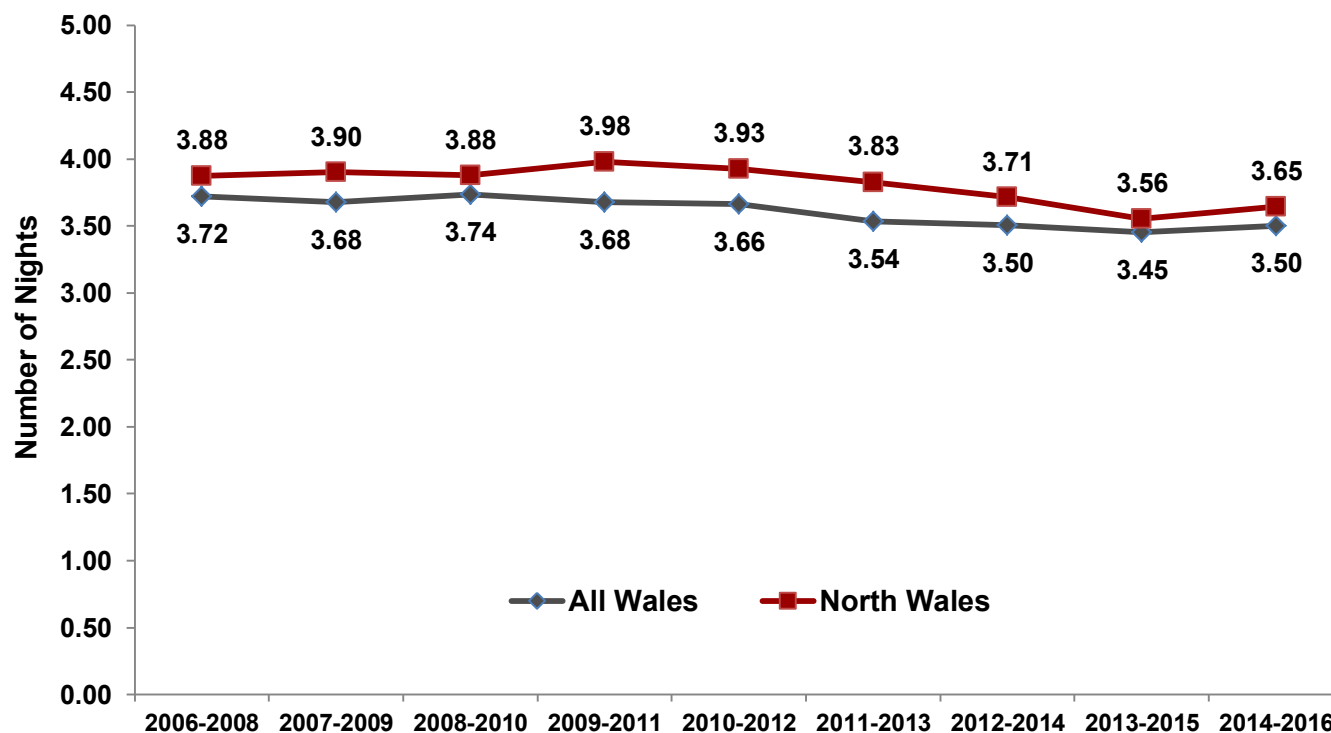




The average spend per overnight domestic GB trip to North Wales in 2014-2016 was £176, the highest it has been since 2006-2008. For comparison, during the same period, the all Wales average was £181.

### Average Number of Nights per Trip

**Figure 1.3 Average Number of Nights per Overnight Domestic GB Trip to Wales and North Wales – Three Year Annual Averages**



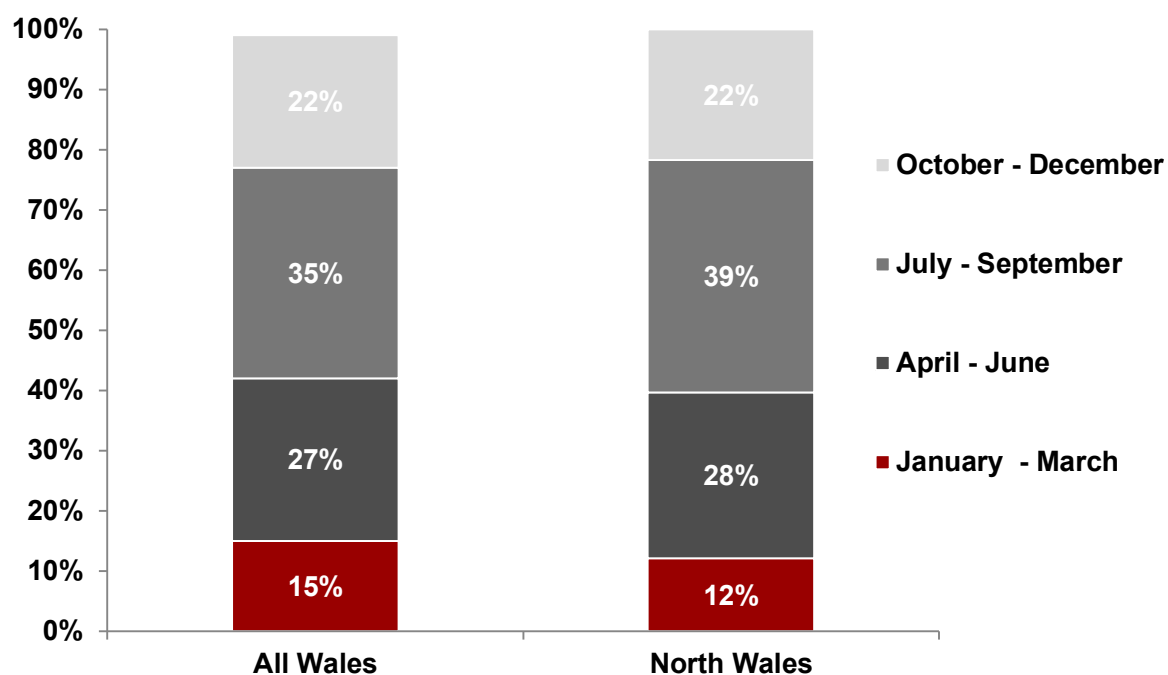
The average number of nights per overnight domestic GB trips in North Wales decreased over the years between 2009-2011 and 2013-2015. Nonetheless, between 2013-2015 and 2014-2016 it increased from 3.56 to 3.65 nights, just over the all Wales average for 2014-2016 of 3.50 nights.

## Seasonality of Trips

Figure 1.5 for North Wales and all Wales during 2014-2016 reflects typical high and low season periods. Overnight domestic GB trips to North Wales tended to happen during the summer months between July-September (39 per cent) or April-June (28 per cent), with Easter usually falling during the month of April.

Over the same period, when compared to Wales overall, North Wales had a lower proportion of visitors arriving between January and March (15 per cent and 12 per cent respectively), but a slightly higher proportion of visitors arriving between July and September (35 per cent and 39 per cent respectively).

**Figure 1.4 Proportion (%) of Overnight Domestic GB Trips to All Wales and North 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.

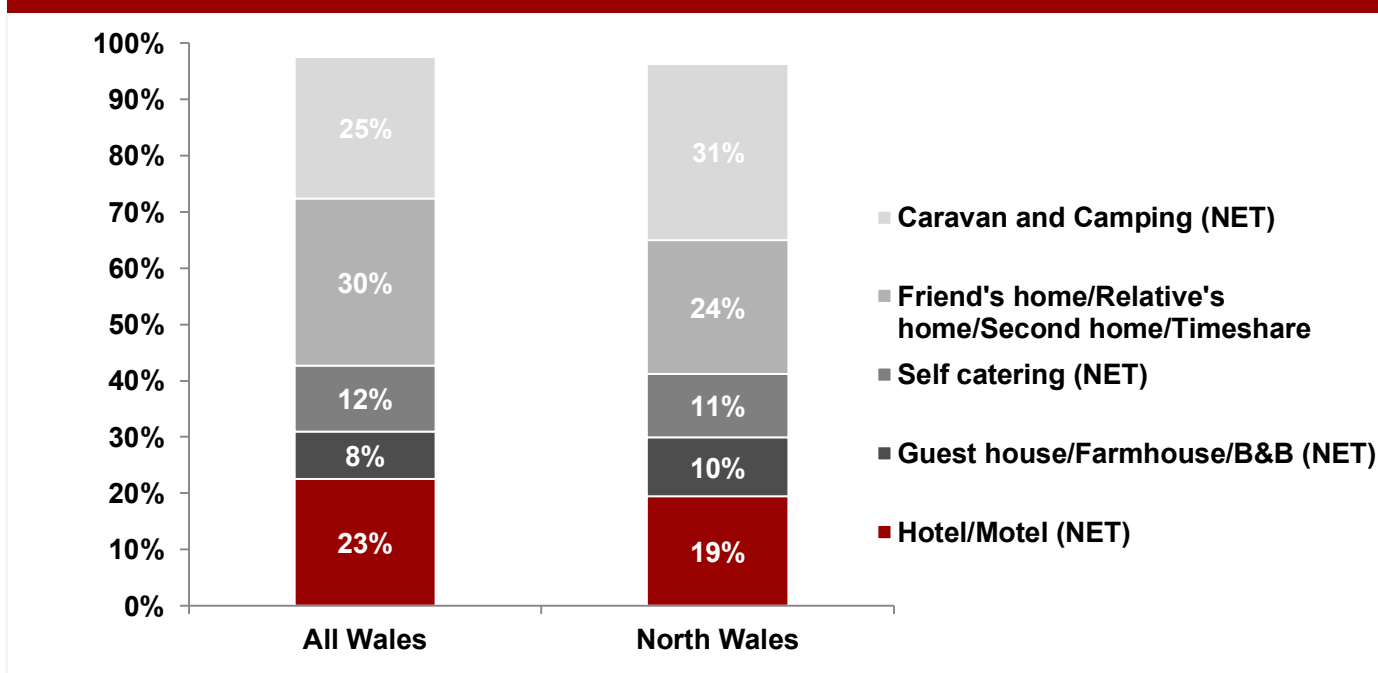
The 2016 Great Britain Tourism Survey used different category names for accommodation types to those in 2014 and 2015. Please refer to [Table 3.9](#) for a full list categories that have been included under NET to calculate three year averages.

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

	All Wales	North Wales
<b>Total Trips</b>	<b>9,919</b>	<b>3,626</b>
Hotel/Motel (NET)	2,233	706
Guest house/Farmhouse/B&B (NET)	836	380
Self catering (NET)	1,169	407
Friend's home/Relative's home/Second home/Timeshare	2,938	866
Caravan and Camping (NET)	2,496	1,132

In 2014-2016 the most popular type of accommodation used on an overnight domestic GB trip to North Wales was 'Caravan and Camping (NET)', with 1,132 thousand trips, nearly a third (31 per cent) of all trips, involving this type of accommodation. On the other hand, during the same period, the most popular accommodation type used in all Wales was a 'Friend's home/Relative's home/Second home/Timeshare' (30 per cent, 2,938 thousand trips).

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



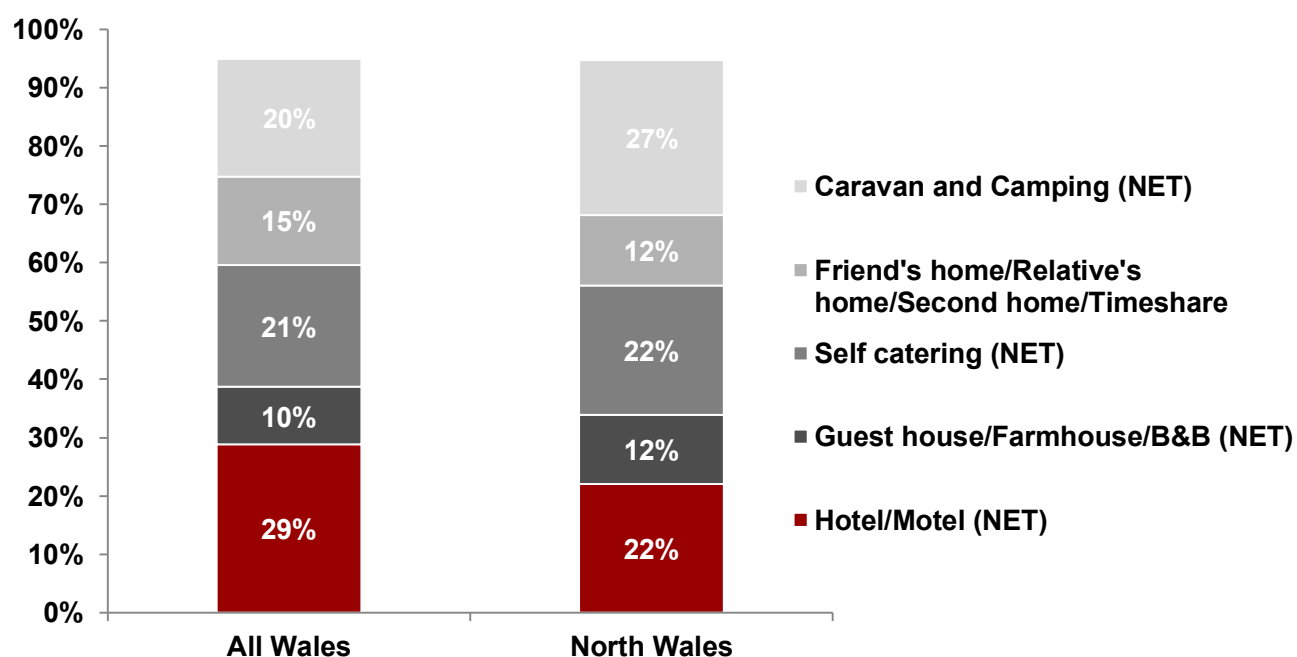
**Table 1.5 Value of Related Expenditure (£ millions) from Overnight Domestic GB Trips by Type of Accommodation Used during a trip to Wales and North Wales – Annual Average 2014-2016**

	All Wales	North Wales
<b>Total Spend</b>	<b>1,800</b>	<b>639</b>
Hotel/Motel (NET)	518	141
Guest house/Farmhouse/B&B (NET)	178	76
Self catering (NET)	376	142
Friend's home/Relative's home/Second home/Timeshare	272	77
Caravan and Camping (NET)	362	169

As seen in Figure 1.5, although 'Friend's home/Relative's home/Second home/Timeshare' included a considerable share of volume of trips, 24 per cent for North Wales and 30 per cent for all Wales, it contributed to a much smaller proportion of related expenditure, 12 per cent in North Wales and 15 per cent in all Wales. 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 North Wales and all Wales, 'Hotel/Motel (NET)' contributed to a higher proportion of related expenditure than volume of trips. For example in North Wales, 'Hotel/Motel (NET)' was responsible for 19 per cent of trips (706,000) but contributed to 22 per cent (£141 million) of all expenditure.

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



## Purpose of Trip

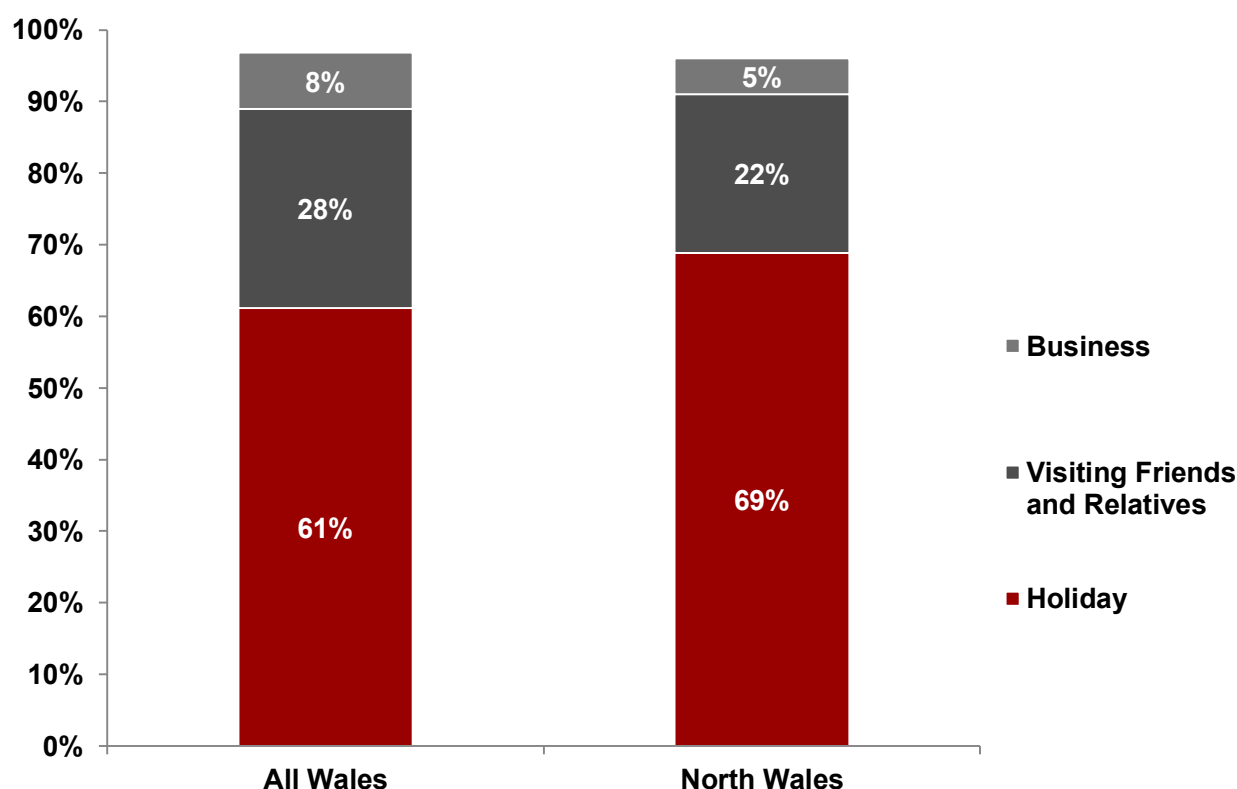
**Table 1.6 Volume of Overnight Domestic GB Trips (000s) by Purpose of Trip to All Wales and North Wales – Annual Average 2014-2016**

	All Wales	North Wales
<b>Total Trips</b>	<b>9,919</b>	<b>3,626</b>
Holiday	6,065	2,495
Visiting Friends and Relatives	2,755	804
Business	779	182

Almost seven in every ten overnight domestic GB trips (69 per cent) in North Wales were likely to be for a holiday - this is to be expected as most visitors tended to arrive between July and September (see [Figure 1.4](#)).

Furthermore, North Wales received the smallest proportion of business visitors (5 per cent) of all the Welsh regions in 2014-2016, with the overall Wales average at 8 per cent over the same period.

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



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

## Type of Place Visited

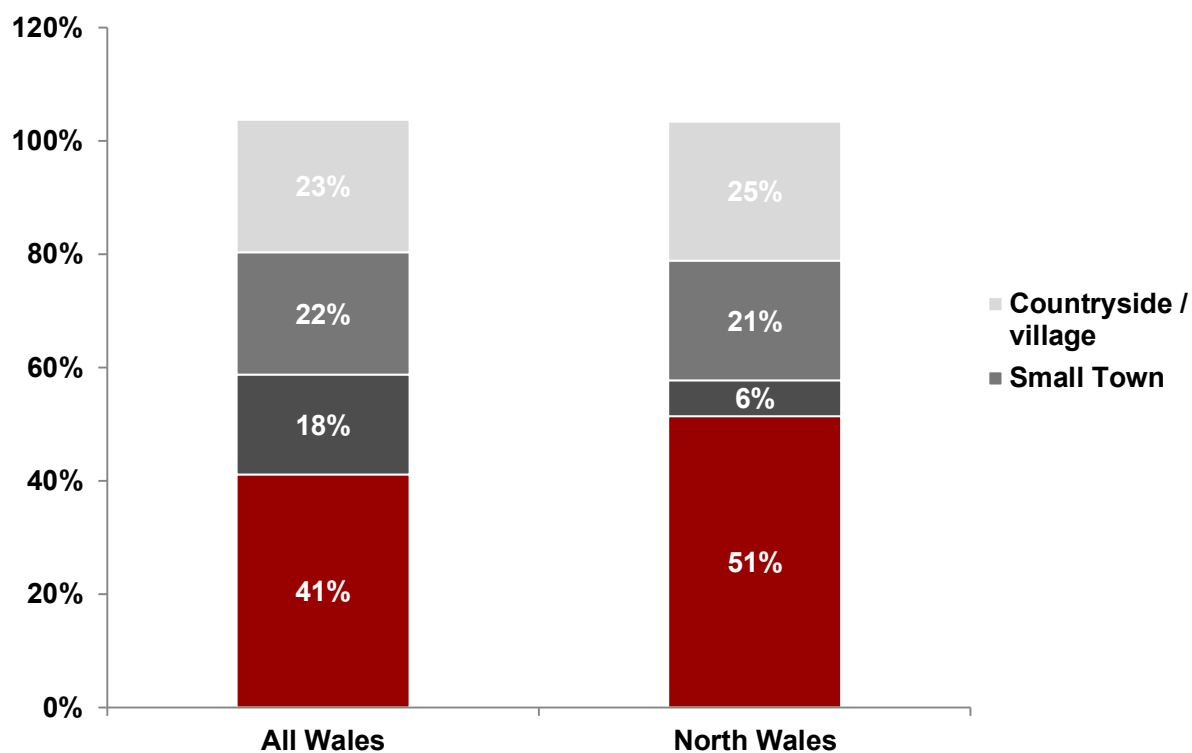
**Table 1.7 Volume of Overnight Domestic GB Trips (000s) by Type of Place Visited to All Wales and North Wales – Annual Average 2014-2016**

	All Wales	North Wales
<b>Total Trips</b>	<b>9,919</b>	<b>3,626</b>
Seaside	4,076	1,865
Large city / large town	1,747	229
Small town	2,143	766
Countryside / village	2,320	889

In 2014-2016, the most popular destination for overnight domestic GB trips to North Wales was the seaside (51 per cent). The least popular place to visit was a large city or town (6 per cent). A similar pattern can be seen in the whole of Wales, with 41 per cent visiting the seaside and only 18 per cent a large city/town.

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 North Wales – Annual Average 2014-2016**



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

## Lifestage

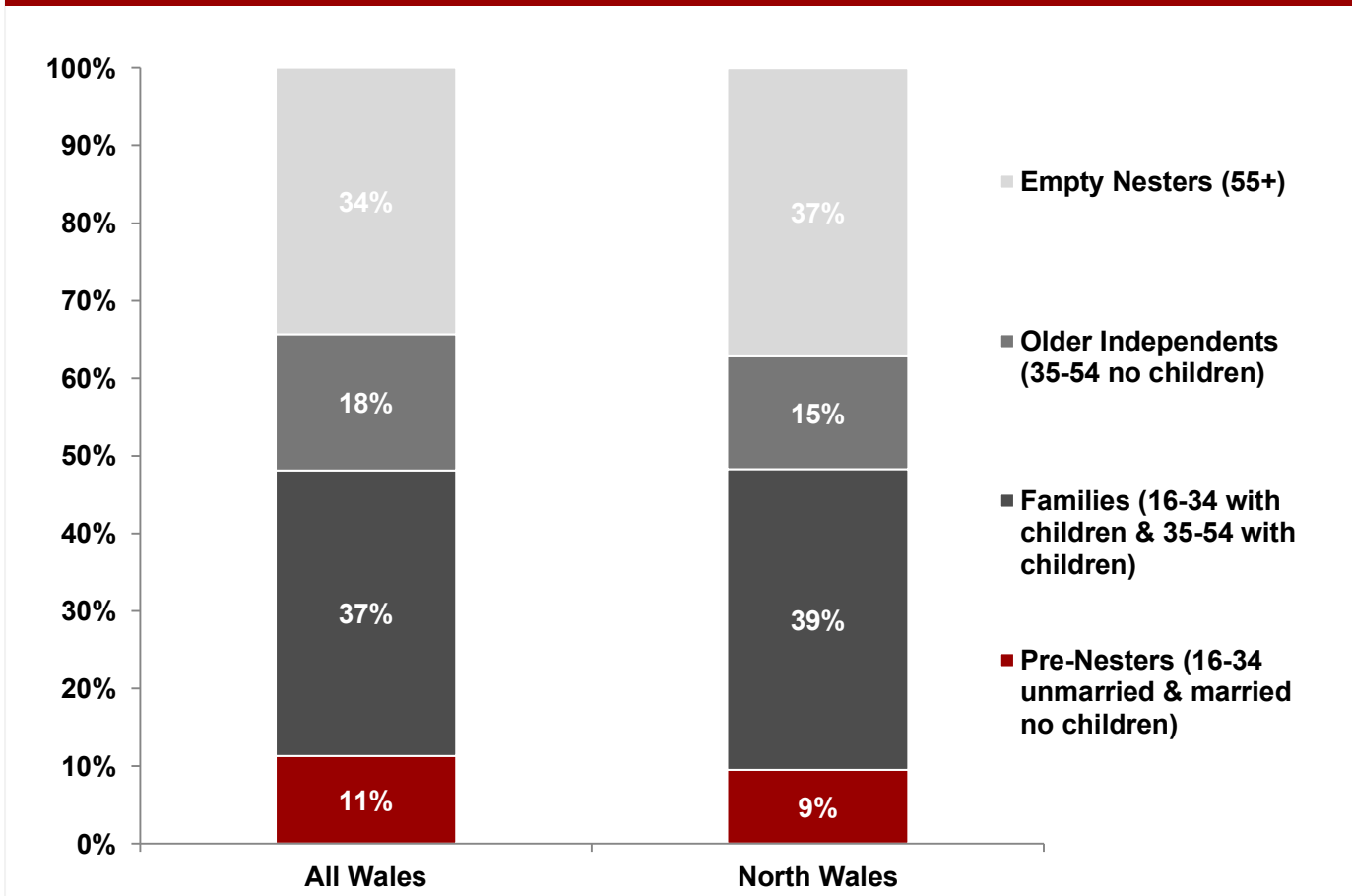
**Table 1.8 Volume of Overnight Domestic GB Holiday Trips (000s) by Lifestage to All Wales and North Wales – Annual Average 2014-2016**

	All Wales	North Wales
<b>Total Holiday Trips</b>	<b>6,065</b>	<b>2,490</b>
Pre-Nesters (16-34 unmarried & married no children)	685	236
Families (16-34 with children & 35-54 with children)	2,234	965
Older Independents (35-54 no children)	1,063	363
Empty Nesters (55+)	2,083	925

The majority of overnight domestic GB holiday trips taken in North Wales during 2014-2016 were made by families (39 per cent). This trend is also seen in Wales, with 37 per cent of holiday trips belonging to this category.

Empty nesters also made up a high proportion of total holiday trips to North Wales, at 37 per cent. In addition, older independents made up 15 per cent of holiday trips to North Wales, whilst only 9 per cent were made by pre-nesters.

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

	All Wales	North Wales
<b>Total Trips</b>	<b>9,919</b>	<b>3,626</b>
Scotland	101	42
Wales	2,048	579
England	7,766	3,005
North East England	161	63
North West England	1,885	1,406
Yorkshire and the Humber	499	221
East Midlands	537	199
West Midlands	1,716	563
East of England	369	100
London	611	133
South East England	909	167
South West England	1,079	155

Out of all the regions in Wales, North Wales had the highest proportion of overnight domestic GB trips from England (83 per cent) in 2014-2016. Moreover, over the same period, it had the smallest amount of overnight Welsh visitors (16 per cent).

Nearly two fifths (39 per cent) of overnight domestic GB trips to North Wales originated from North West England. In comparison, the highest proportion of English visitors to Wales originated from North West England (19 per cent).

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

	All Wales	North Wales
<b>Total Trips</b>	<b>100%</b>	<b>100%</b>
Scotland	1%	1%
Wales	21%	16%
England	78%	83%
North East England	2%	2%
North West England	19%	39%
Yorkshire and the Humber	5%	6%
East Midlands	5%	5%
West Midlands	17%	16%
East of England	4%	3%
London	6%	4%
South East England	9%	5%
South West England	11%	4%

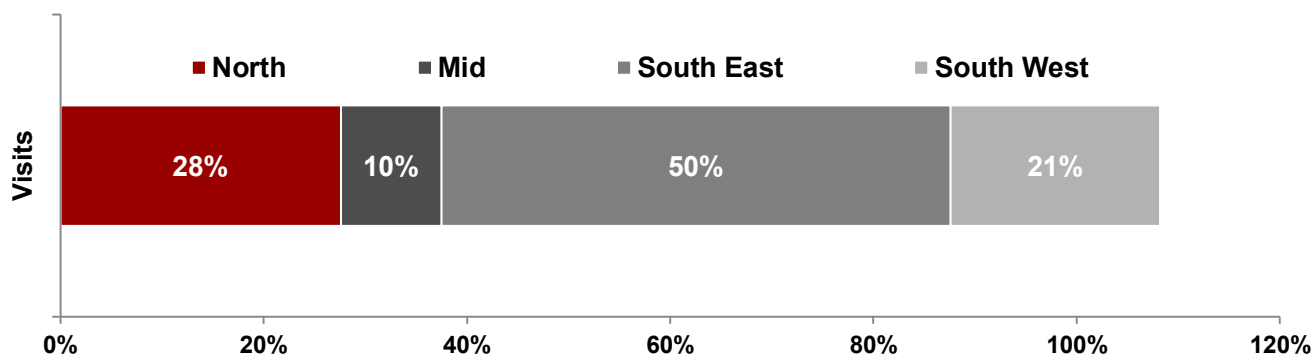


### 3. International Visitors

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, North Wales received an annual average of 274,000 international visits per year. Over this same period, these visits contributed an average of £88 million per year to the Welsh economy. North Wales received 28 per cent of all international visits to Wales.

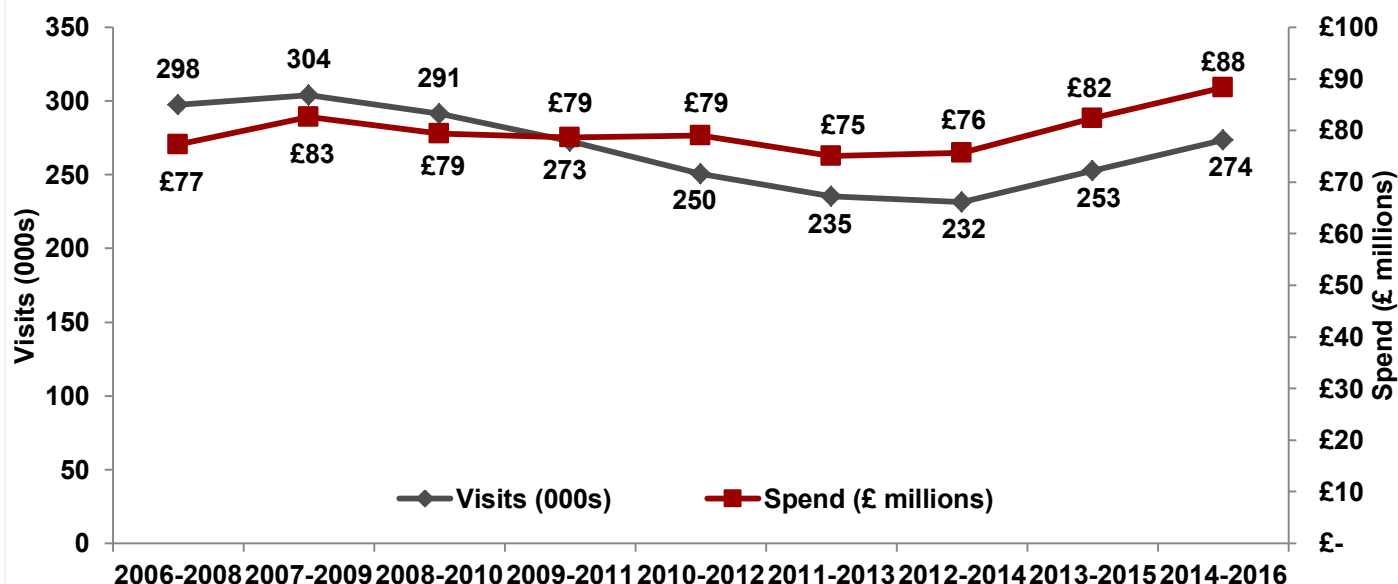
**Figure 2.0 Proportion (%) of International Visits to Wales by Welsh Region – Annual Average 2014-2016**



*\*Please note that the figures might add up to over 100% 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 North Wales - Three Year Annual Averages**

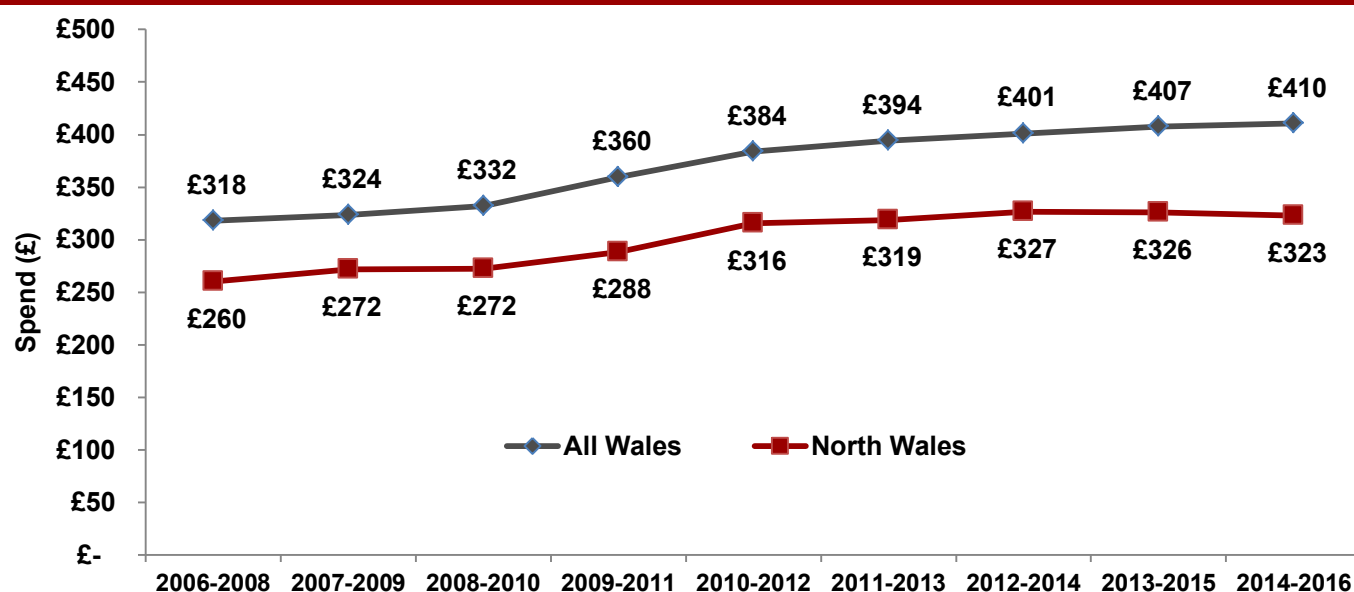


Between 2007-2009 and 2012-2014 there was a continuous decrease in the annual average volume of overnight domestic GB trips to North Wales. Nonetheless, post 2012-2014 the volume of visits recovered, and in 2014-2016 it reached 274,000.

The annual average related expenditure remained the same at £79 million between 2008-2010 and 2010-2012, decreasing slightly in the years following this period but then increasing rapidly post 2012-2014. The annual average related expenditure in 2014-2016 was £88 million.

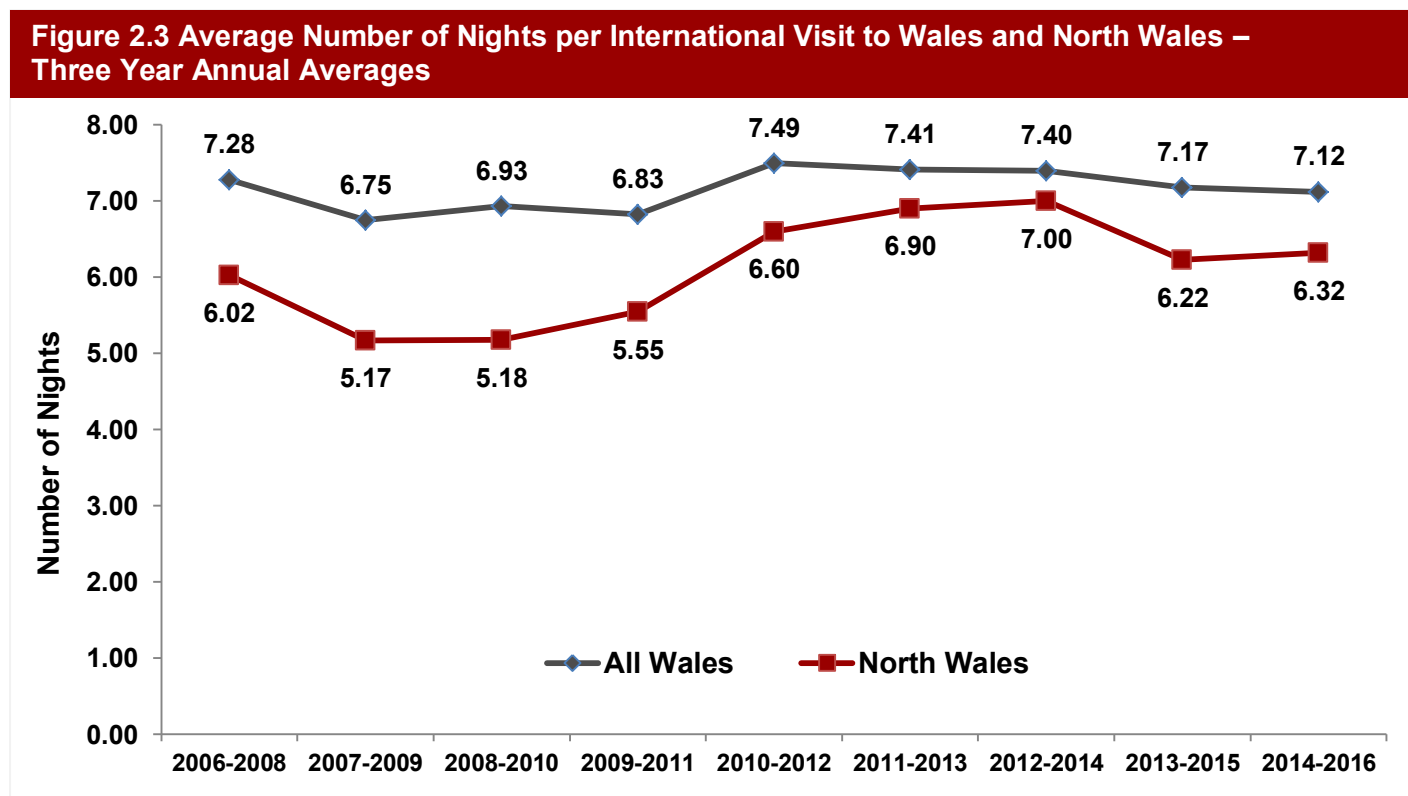
## Average Spend per Visit

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



From 2008-2010 onwards, the average spend per international visit to North Wales increased, reaching £323 in 2014-2016, consistently falling below the all Wales average of £410 during the same period.

## Average Number of Nights per Visit



The average number of nights per international visit to North Wales increased considerably in the years following 2007-2009, reaching 7.00 nights in 2012-2014. Nonetheless, there were decreases after this period and in 2014-2016 it was at an average of 6.32 nights per international visit, below the all Wales average of 7.12 during the same period.

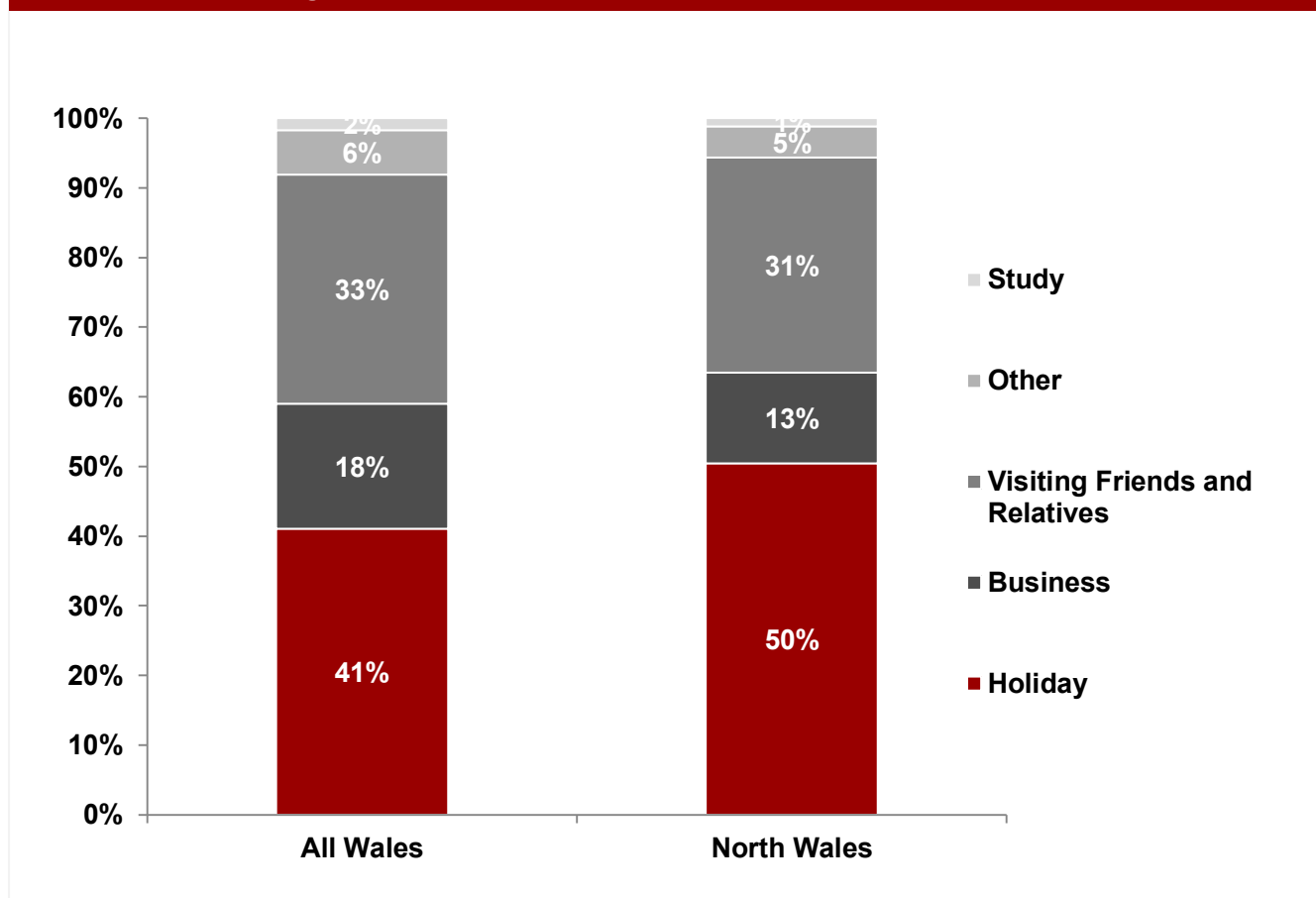
## Purpose of Trip

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

	All Wales	North Wales
<b>Total Trips</b>	<b>992</b>	<b>274</b>
Holiday	407	138
Business	178	36
Visiting Friends and Relatives	327	84
Other	63	12
Study	17	3

In 2014-2016, half (50 per cent) of all international visitors to North Wales came for a holiday, a higher proportion than Wales overall (41 per cent). Moreover, nearly a third (31 per cent) of international visitors came to visit friends and family – a similar average to that of all Wales (33 per cent). In addition, North Wales had a smaller proportion of business visitors (13 per cent) than all Wales (18 per cent).

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

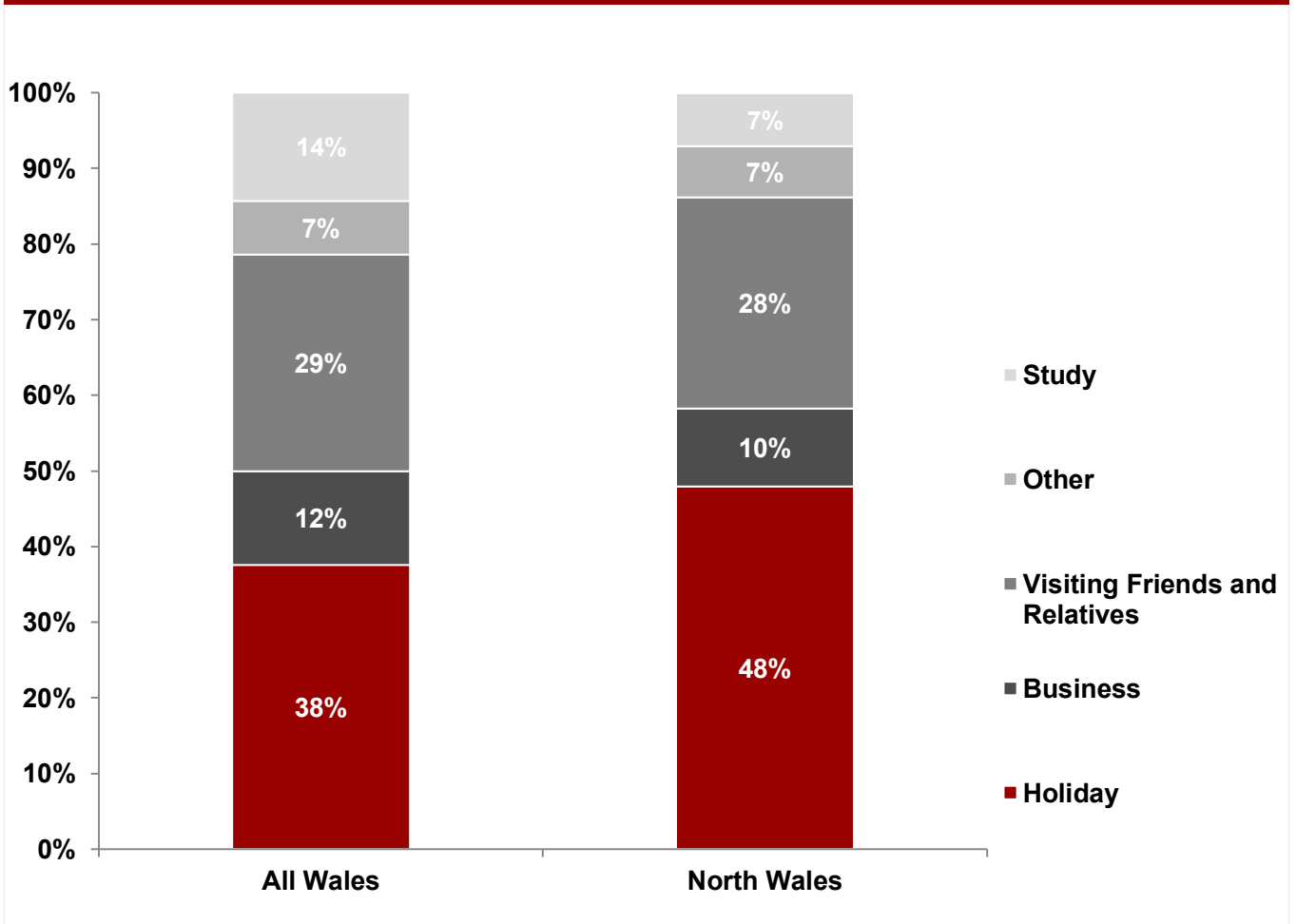


**Table 2.2 Related Expenditure (£ millions) of International Visits by Purpose of Trip to All Wales and North Wales – Annual Average 2014-2016**

	All Wales	North Wales
<b>Total Expenditure</b>	<b>407</b>	<b>88</b>
Holiday	153	42
Business	50	9
Visiting Friends and Relatives	117	25
Other	29	6
Study	58	6

In 2014-2016, international visitors coming to North Wales to study generated 7 per cent (£6 million) of all tourism related expenditure. 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 volume of international visits. For example in 2014-2016 the proportion of international visitors arriving to study in North Wales accounted for only 1 per cent of the total visitor numbers, but they contributed to 7 per cent of all tourism related expenditure in North Wales.

**Figure 2.5 Proportion (%) of Related Expenditure of International Visitors to All Wales and North 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 North Wales and all Wales.

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

All Wales		North Wales	
<b>All Visits</b>	<b>992</b>	<b>All Visits</b>	<b>274</b>
Ireland	148	Ireland	54
France	103	Germany	31
Germany	94	USA	30
USA	89	France	25
Australia	66	Australia	19
Netherlands	64	Netherlands	18
Spain	55	Poland	13
Poland	49	Spain	12
Canada	31	Belgium	8
Italy	30	Canada	8

The most common countries of origin for international visitors to North Wales were from Ireland 20 per cent, followed by Germany 12 per cent and the USA 11 per cent.

North Wales had similar countries listed in its top 10 when compared to Wales overall. The only dissimilarities being Belgium, which was listed for North Wales (3 per cent) but not all Wales; and Italy (3 per cent), listed for Wales but not North Wales.

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

All Wales		North Wales	
<b>All Visits</b>	<b>100%</b>	<b>All Visits</b>	<b>100%</b>
Ireland	15%	Ireland	20%
France	10%	Germany	12%
Germany	9%	USA	11%
USA	9%	France	9%
Australia	7%	Australia	7%
Netherlands	6%	Netherlands	7%
Spain	6%	Poland	5%
Poland	5%	Spain	4%
Canada	3%	Belgium	3%
Italy	3%	Canada	3%

## Local Authorities Visited

The most visited local authority in North Wales by international visits in 2014-2016 was Gwynedd with 88,000 visits, followed closely by Conwy with 82,000

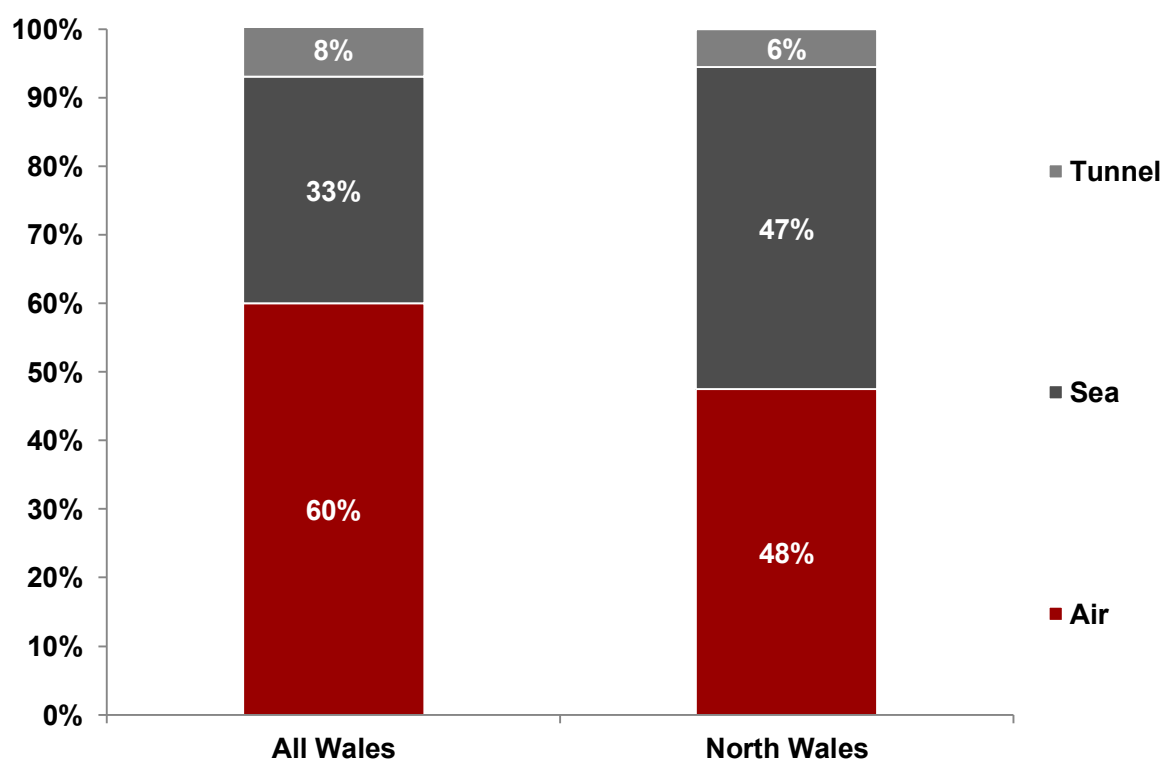
**Table 2.5 Volume of International Visits to each Local Authority in North Wales – Annual Average 2014-2016**

	Visits
Gwynedd	88,000
Conwy	82,000
(Isle of) Anglesey	48,000
Denbighshire	35,000
Wrexham	32,000
Flintshire	20,000

## Mode of Transport Used

In 2014-2016 North Wales had the highest proportion of all the Welsh regions for international visitors choosing to travel by sea (47 per cent), a higher proportion than the overall Wales average of 33 per cent.

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





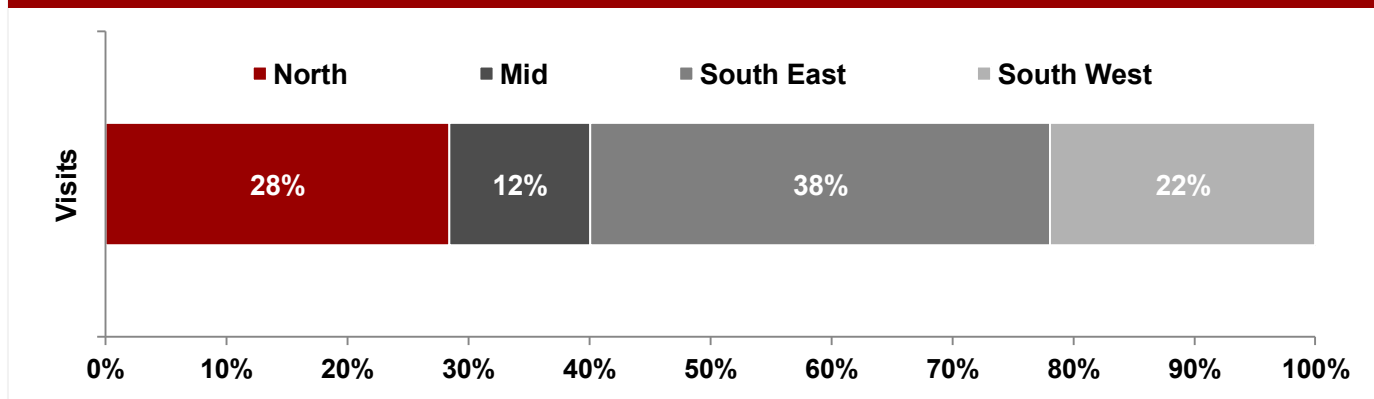
## 4. Tourism Day Visits

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.

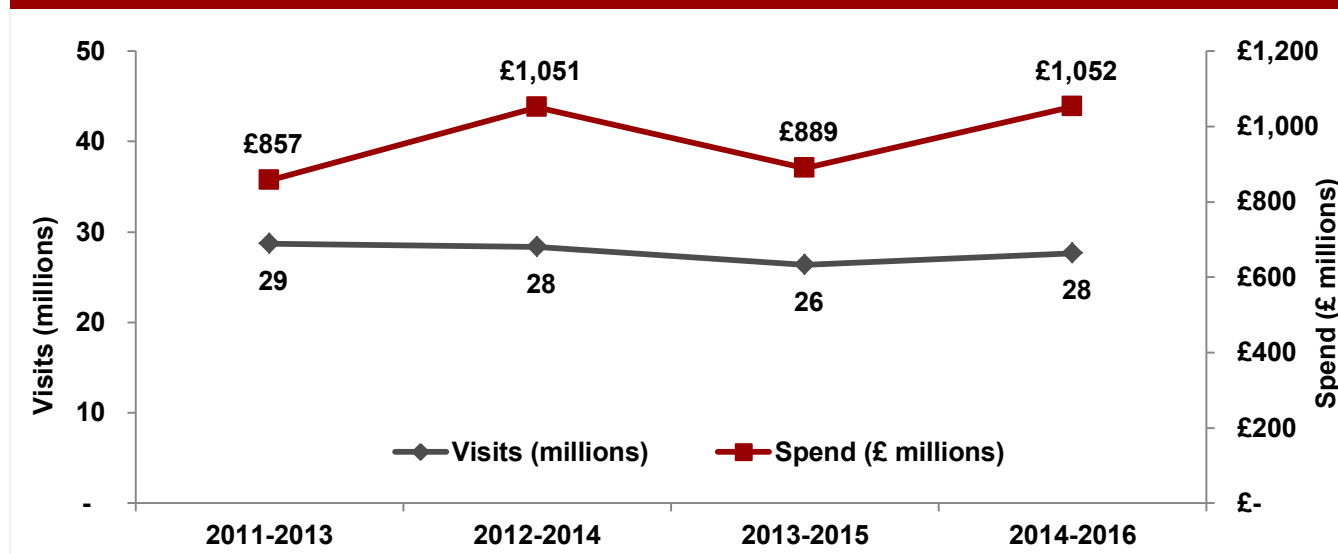
During 2014-2016, North Wales received an annual average of 28 million day visits with a related expenditure of £1,052 million. Moreover, North Wales accounted for 28 per cent of all Tourism Day visits to Wales.

**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 North Wales - Three Year Annual Averages**

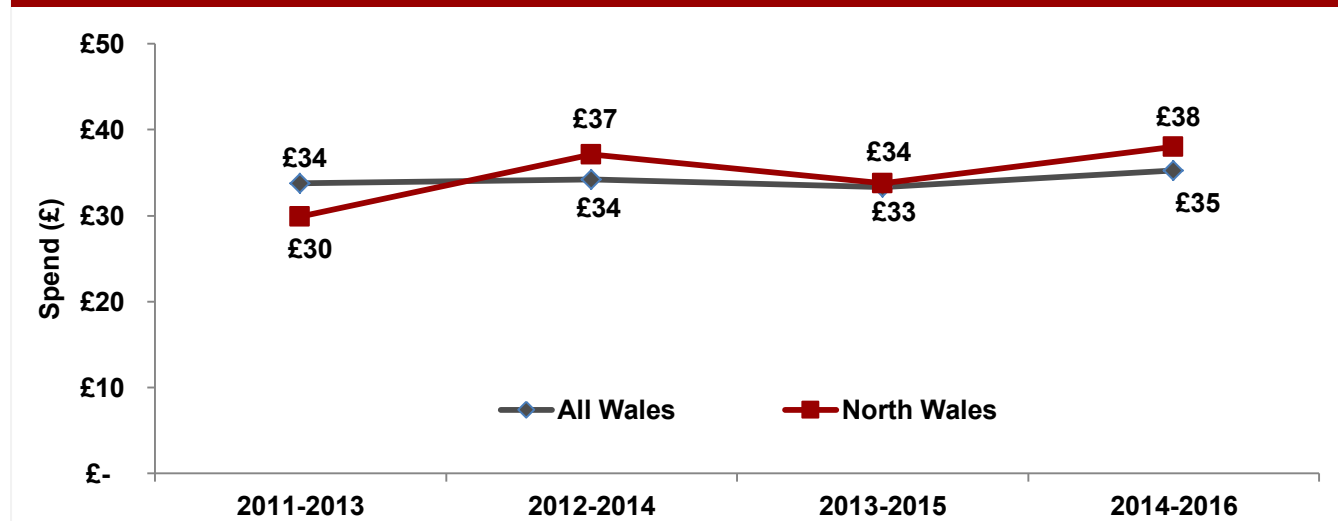


The annual average volume of Tourism Day visits remained constant over the years with slight decreases in 2013-2015 to 26 million visits but increasing again to 28 million in 2014-2016.

Related expenditure for Tourism Day visits to North Wales has tended to fluctuate over the years, increasing post 2011-2013 and then decreasing again after 2012-2014. Nonetheless, related expenditure following 2013-2015 has increased, reaching a peak in 2014-2016 at £1,052 million.

## Average Spend per Visit

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



From 2012-2014 onwards, the average spend per Tourism Day visit in North Wales is higher than that of Wales overall. In 2014-2016 the average spend per Tourism Day visit in Wales was £35, whereas for North Wales it was £38.

## 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 North Wales – Annual Average 2014-2016**

All Wales			North Wales		
<b>All Visits</b>	<b>97.3</b>	<b>100%</b>	<b>All Visits</b>	<b>27.7</b>	<b>100%</b>
Visiting friends or family	19.8	20%	Visiting friends or family	6.0	22%
Going out for a meal	10.5	11%	Going out for a meal	3.6	13%
Outdoor activities	9.1	9%	Outdoor activities	3.1	11%
General day out	7.1	7%	General day out	4.6	17%
Going on a night out	6.9	7%	Going on a night out	1.2	4%
Special shopping	6.2	6%	Special shopping	1.5	6%
Going out for entertainment	4.7	5%	Going out for entertainment	1.3	5%
Watching live sporting events	3.6	4%	Watching live sporting events	1.1	4%
Taking part in sports	3.4	3%	Taking part in sports	0.4	1%
Other day out for leisure	3.3	3%	Other day out for leisure	1.5	6%
Going to visitor attractions	3.3	3%	Going to visitor attractions	1.3	5%
Other leisure/ hobbies	2.9	3%	Other leisure/ hobbies	1.1	4%
Special personal events	2.5	3%	Special personal events	0.5	2%
Special public events	1.9	2%	Special public events	0.4	1%
Day out to health/beauty spa	0.7	1%	Day out to health/beauty spa	0.2	1%

Just over a fifth (22 per cent, 6.0 million) of Tourism Day visitors to North Wales in 2014-2016 visited friends or family, making it the most popular activity undertaken. This was also seen in Wales as a whole, where 20 per cent (19.8 million) Tourism Day visitors visited friends or family in 2014-2016.

A higher proportion of Tourism Day visitors to North Wales (17 per cent) selected a 'General Day Out' as an activity undertaken in 2014-2016, while only 8 per cent did this when visiting all Wales.

## Type of Place Visited

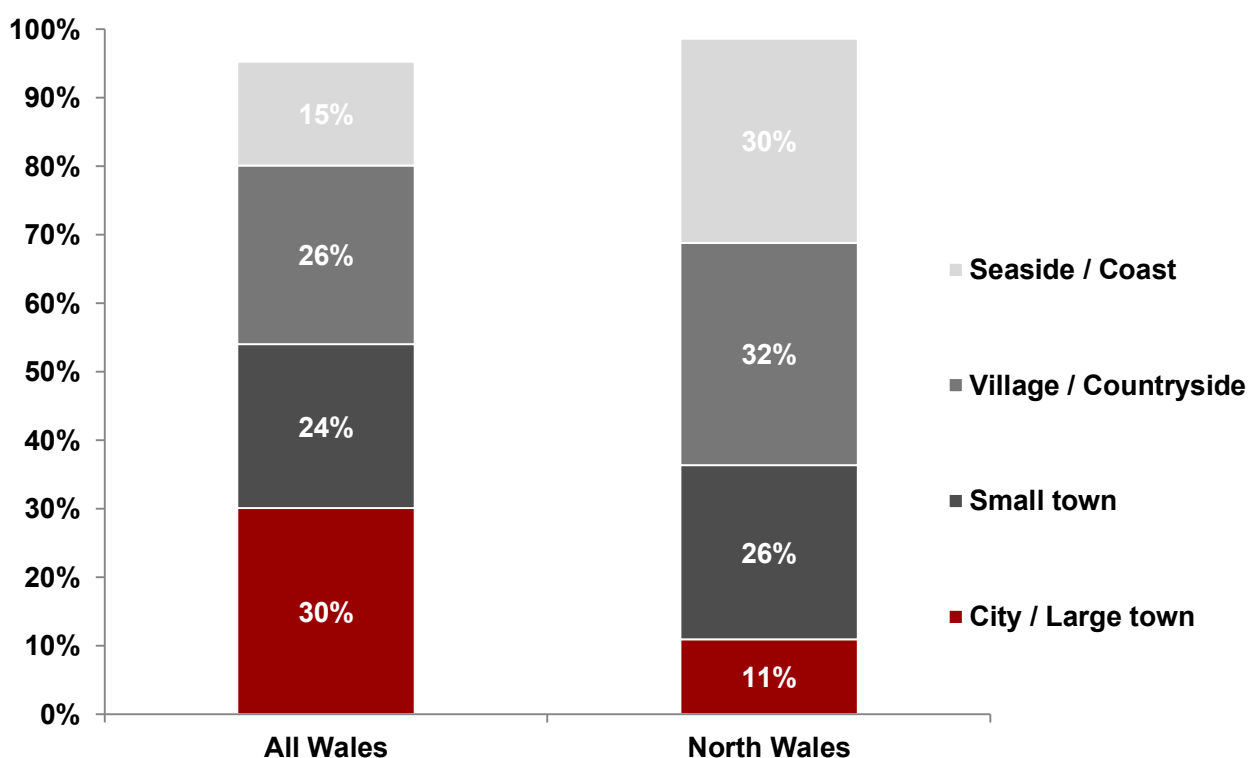
**Table 2.7 Volume of Tourism Day Visits (millions) by Type of Place Visited to All Wales and North Wales – Annual Average 2014-2016**

	All Wales	North Wales
<b>Total Visits</b>	<b>97</b>	<b>28</b>
City / Large town	29	3
Small town	23	7
Village / Countryside	25	9
Seaside / Coast	15	8

In North Wales, the type of place most visited on a Tourism Day visit during 2014-2016 was the village/countryside, with nearly a third (32 per cent, 9 million) of visitors choosing this type of location. This contrasts with overnight domestic GB trips, where just over half (51 per cent) decided to visit a seaside location (see [Figure 1.8](#)).

In comparison with all Wales, North Wales has double the proportion of Tourism Day visitors choosing to travel to the seaside/coast (15 per cent and 30 per cent respectively). On the other hand only 11 per cent of Tourism Day visitors to North Wales visited a city/large town in 2014-2016, compared to 30 per cent in all Wales.

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



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

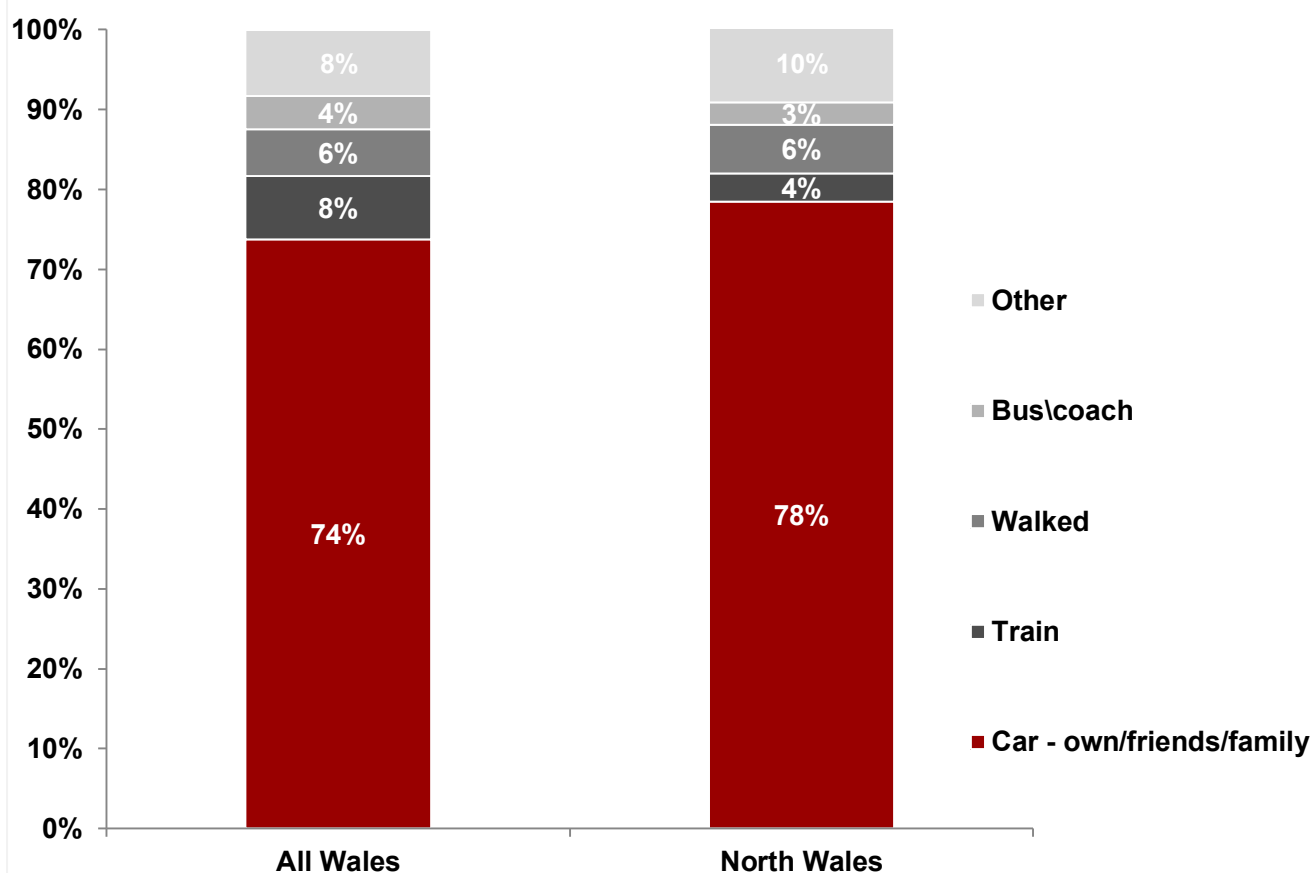
## Mode of Transport Used

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

	All Wales	North Wales
<b>Total Visits</b>	<b>97</b>	<b>28</b>
Car - own/friends/family	72	22
Train	8	1
Walked	6	2
Bus\coach	4	1
Other	8	3

Like in the other regions in Wales, the car is the most preferred mode of transportation in North Wales, with the majority (78 per cent) of Tourism Day visitors choosing to travel this way. In North Wales, a smaller proportion than for Wales overall used the train during their Tourism Day visit in 2014-2016 (4 per cent and 8 per cent respectively).

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



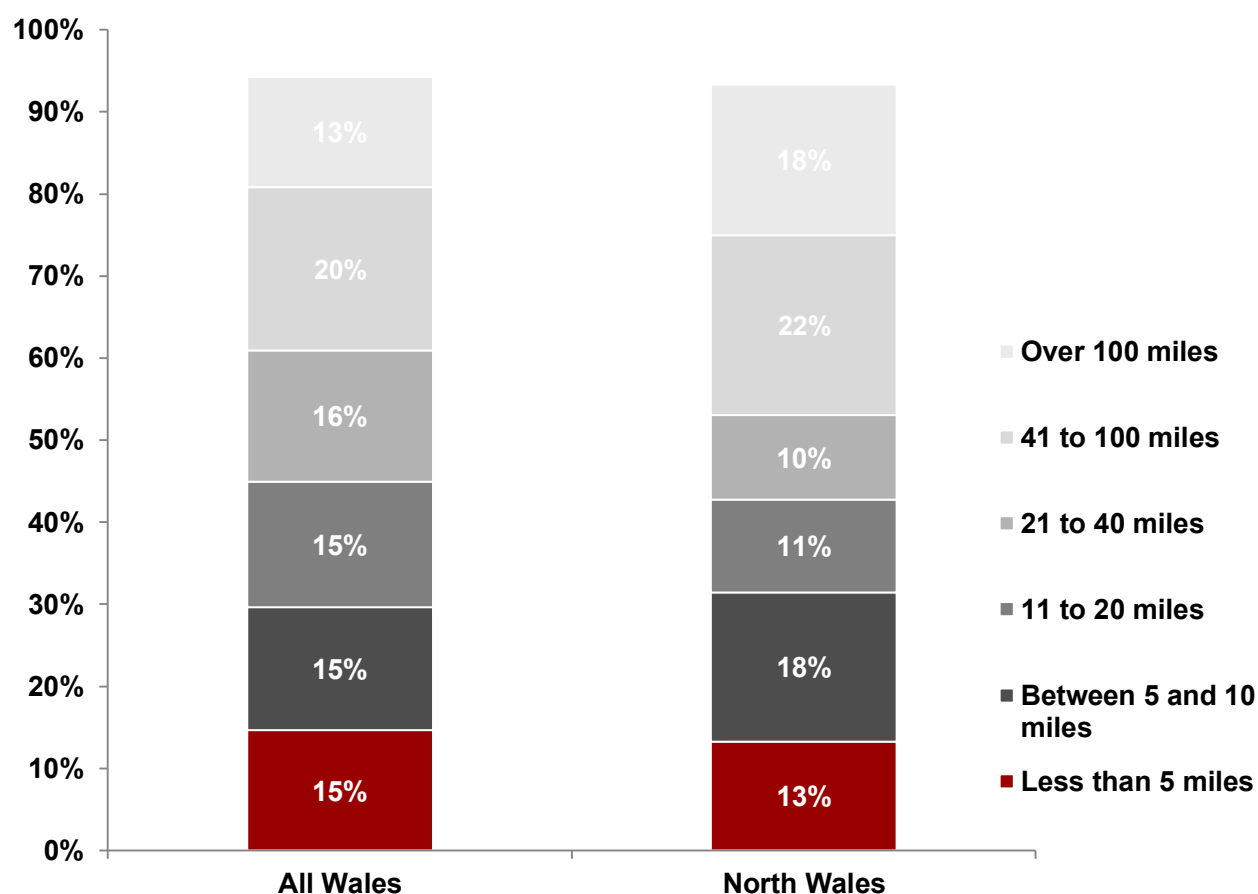
## Distance Travelled

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

	All Wales	North Wales
<b>Total Visits</b>	<b>97</b>	<b>28</b>
Less than 5 miles	14	4
Between 5 and 10 miles	15	5
11 to 20 miles	15	3
21 to 40 miles	16	3
41 to 100 miles	19	6
Over 100 miles	13	5

Compared to Wales overall and the rest of the Welsh regions, North Wales had the highest proportion of Tourism Day visits travelling 41 to 100 miles (20 per cent and 22 per cent respectively) and 100 miles and over (13 per cent and 18 per cent respectively).

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



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

## Region of Residence

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 North Wales originated from North Wales itself (44 per cent).

The second most common region of origin of Tourism Day visitors to North Wales was North West England, with nearly a third (31 per cent, 8.47 million) of Tourism Day visitors residing in this area in 2014-2016.

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

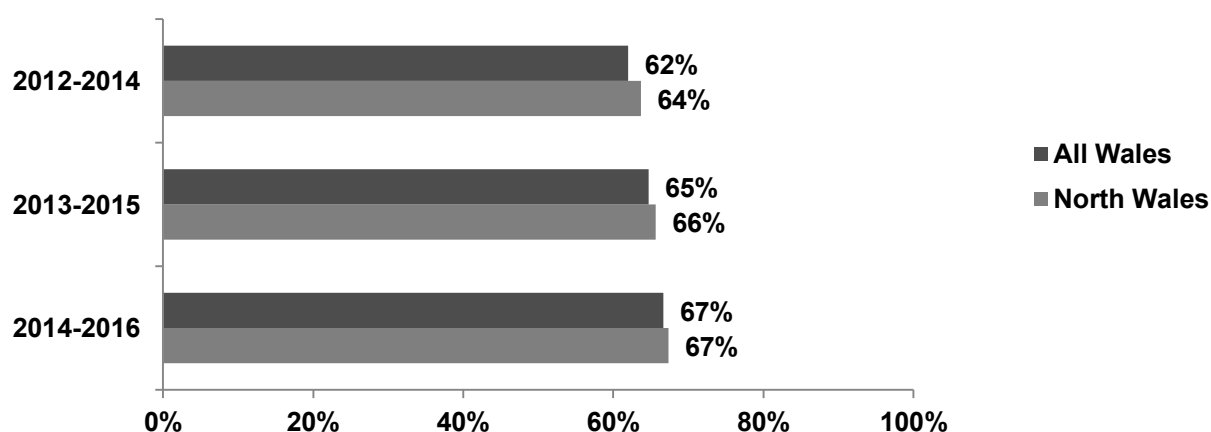
	North Wales	
<b>All Visits</b>	<b>28</b>	<b>100%</b>
North Wales	12.12	44%
North West England	8.47	31%
West Midlands	2.03	7%
Yorkshire and The Humber	1.06	4%
South West England	1.02	4%
London	0.78	3%
East Midlands	0.69	2%
Scotland	0.53	2%
Mid Wales	0.47	2%
East of England	0.16	1%
South East Wales	0.15	1%
North East England	0.10	0%
South East England	0.09	0%
South West Wales	0.06	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

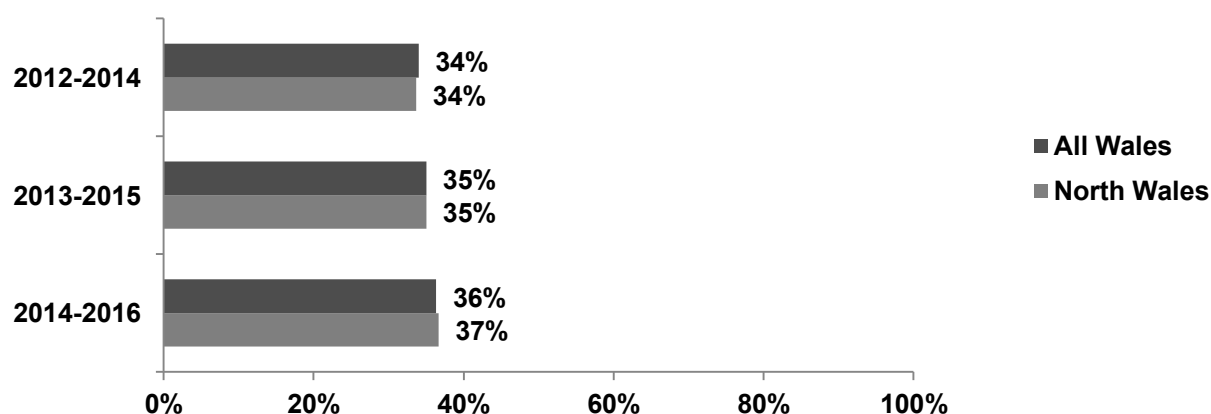
**Figure 3.3 Three Year Annual Average Hotel Room Occupancy Rates for All Wales and North Wales**



Room occupancy rates have continued to increase over the years in North Wales, reaching 67 per cent in 2014-2016, on par with the overall Wales average.

### Guesthouses and B&Bs

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

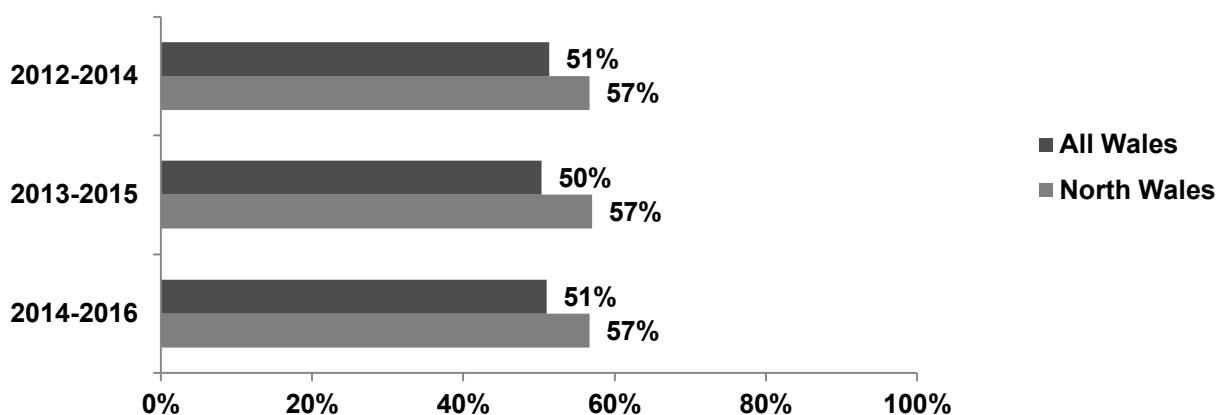


Similar to Hotel room occupancy rates, Guesthouse/B&B rates have continuously increased over the past few years and for 2014-2016, at 37 per cent, they are slightly above the overall Wales average of 36 per cent.



## Self-Catering

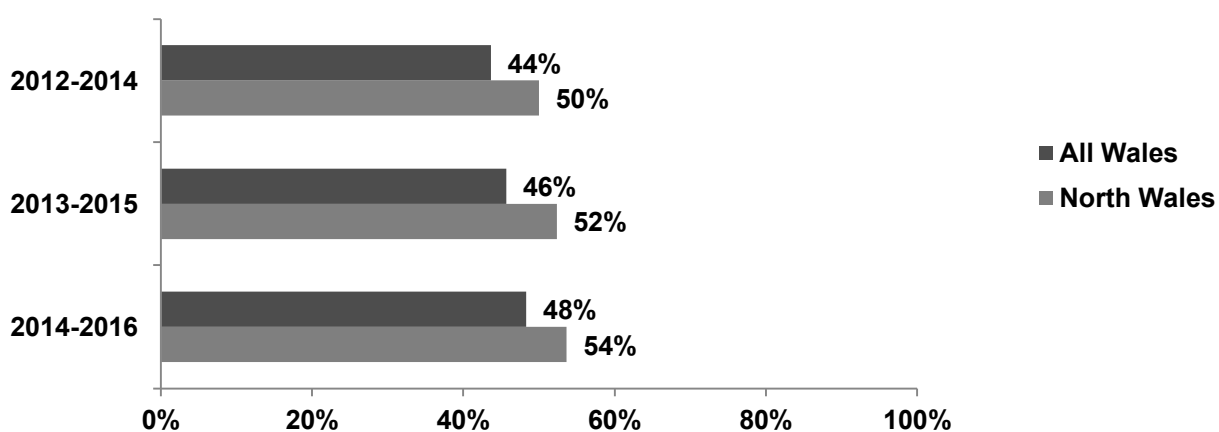
**Figure 3.5 Three Year Annual Average Self-Catering Unit Occupancy Rates for All Wales and North Wales**



Even though the Self-Catering unit occupancy rates have remained constant in North Wales over the years, the region still has the highest rates of all the Welsh regions for this kind of accommodation. In comparison the Wales average for 2014-2016 was 51 per cent, while the rate in North Wales was 57 per cent.

## Hostels

**Figure 3.6 Three Year Annual Average Hostel Bedspace Occupancy Rates for All Wales and North Wales**



Like for Self-Catering accommodation, Hostel occupancy rates in North Wales for 2014-2016 (54 per cent) were higher than for the other regions in Wales. In contrast, over the same period, the Hostel occupancy rate in Wales overall was 48 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.

North Wales had 40 per cent of all accommodation establishments and over half (51 per cent) of all bedspaces in Wales. The dominant type of accommodation establishment in both North Wales (2,730) and all Wales (7,067) was self-catering, while the majority of bedspaces were Caravan/Camping (223,368 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
<b>North Wales</b>	<b>1,260</b>	<b>2,730</b>	<b>671</b>	<b>74</b>	<b>1</b>
Mid Wales	646	995	214	69	28
South East Wales	499	276	74	29	3
South West Wales	800	3,066	363	52	18

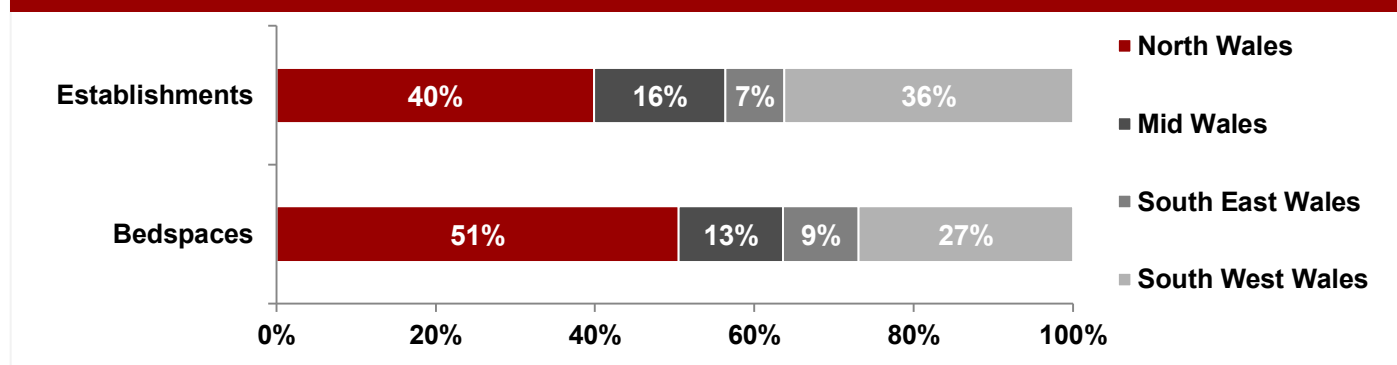
\*Includes nomadic structures such as tipis and yurts, as well as Romany caravans.

**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
<b>North Wales</b>	<b>30,265</b>	<b>24,193</b>	<b>223,368</b>	<b>4,970</b>	<b>2</b>
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

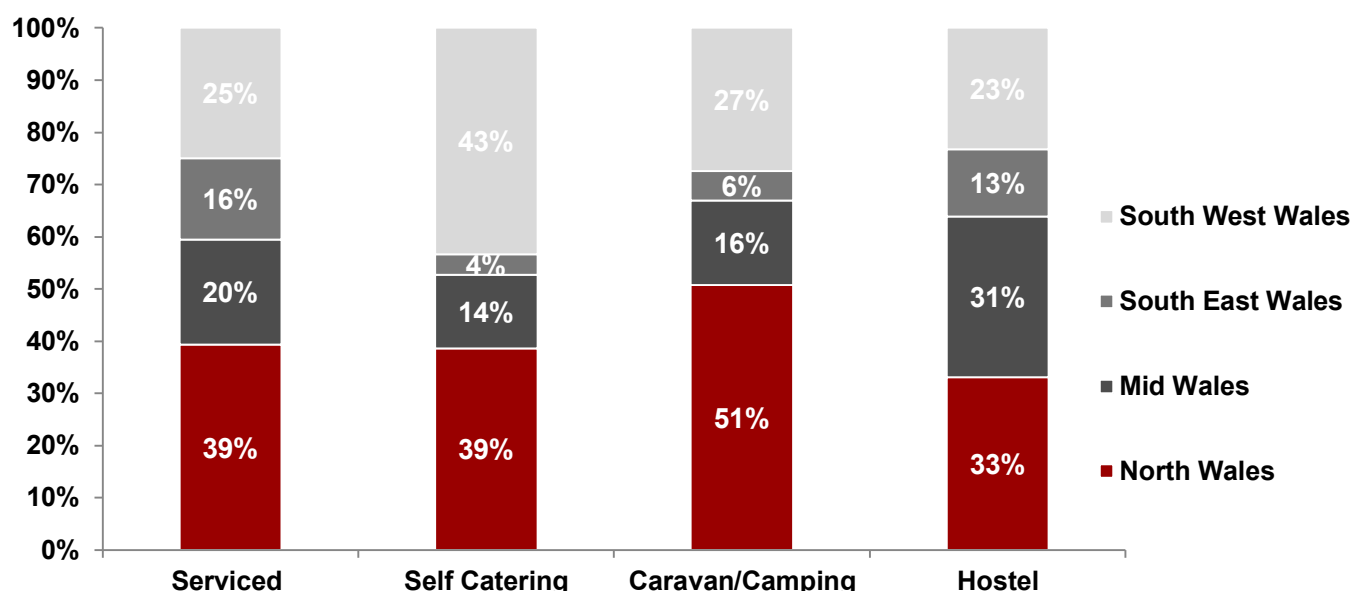
\*Includes nomadic structures such as tipis and yurts, as well as Romany caravans.

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



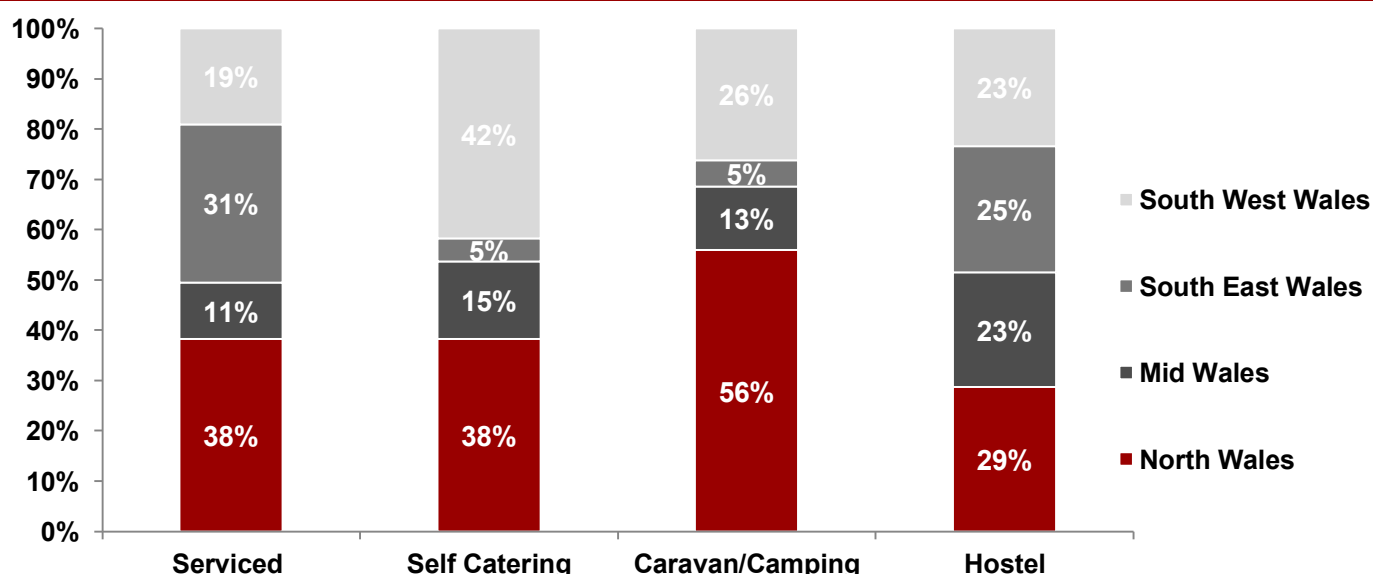
Within Wales, the majority of serviced (39 per cent), caravan/camping (51 per cent) and hostel (33 per cent) establishments were located in North Wales. Furthermore, 39 per cent of all self catering establishments in Wales are also found in North Wales.

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



The proportion of accommodation bedspaces (Figure 3.9) in North Wales for serviced and self catering are similar to those for establishments. For example North Wales had 39 per cent of all serviced establishments and 38 per cent of serviced bedspaces in Wales. In contrast, North Wales had a smaller proportion of hostel bedspaces (29 per cent) than hostel establishments (33 per cent). Furthermore, North Wales had a higher proportion of caravan/camping bedspaces (56 per cent) than caravan/camping establishments (51 per cent).

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

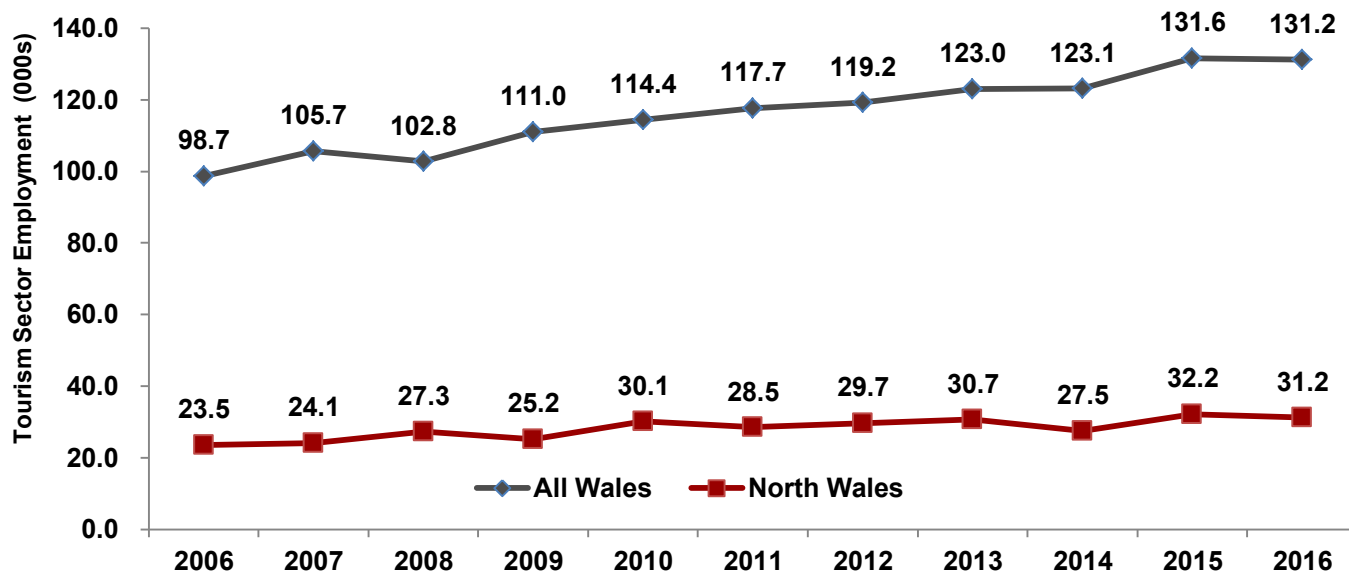


## 7. Tourism Sector Employment

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

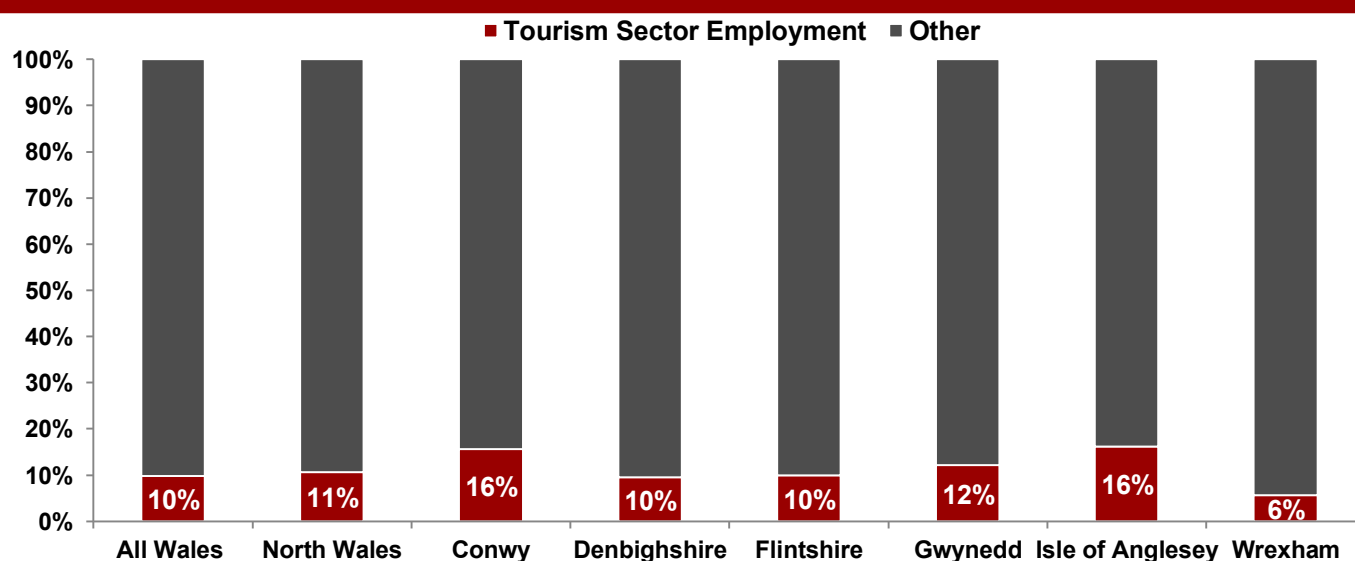
There has been a small decrease between 2015 and 2016 in the number of those employed in the tourism Sector in Wales as a whole, from 131,600 in 2015, to 131,200 in 2016. Over the same period, the volume of those employed in the tourism Sector in North Wales also decreased, from 32,200 to 31,200.

**Figure 4.0 Volume Employed (000s) per year in the Tourism Sector in All Wales and North Wales**



In 2016, the proportion of those employed in the tourism Sector in North Wales (11 per cent) was similar to that of all Wales (10 per cent). However, when looking at the individual local authorities in North Wales, the proportion for some was much higher – 16 per cent in both Conwy and Isle of Anglesey.

**Figure 4.1 Proportion (%) of Tourism Sector Employment compared to all employment in All**



## 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 (000s), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Averages									
Visits (000s)									
	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.

<b>Table 3.5 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) - Three Year Annual Averages</b>				
<b>Visits (millions)</b>				
	<b>2011-2013</b>	<b>2012-2014</b>	<b>2013-2015</b>	<b>2014-2016</b>
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
<b>Spend (£ millions)</b>				
	<b>2011-2013</b>	<b>2012-2014</b>	<b>2013-2015</b>	<b>2014-2016</b>
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
<b>Hotel/Motel (NET)</b>	<b>Hotel/Motel (NET)</b>
Hotel/Motel	Hotel
	Motel
<b>Guest house/Farmhouse/B&amp;B (NET)</b>	<b>Guest house/Farmhouse/B&amp;B (NET)</b>
Paying guest in - Other private house /B&B	Bed & Breakfast
Guest house	Guest house
Paying guest in - farmhouse	Farmhouse
<b>Self catering (NET)</b>	<b>Self catering (NET)</b>
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
<b>Friend's home/Relative's home/Second home/Timeshare</b>	<b>Friend's home/Relative's home/Second home/Timeshare</b>
Friend's /relatives home	Friend's home
Own Second home/timeshare	Relative's home
	Own second homel\timeshare
<b>Caravan and Camping (NET)</b>	<b>Caravan and Camping (NET)</b>
Camping	Caravan and Camping
Caravan - Towed	
Caravan - Static owned	
Caravan - Static not owned	