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Tourism Profile – South West Wales 2016 - 2018



Title: Tourism Profile – South West Wales 2016 - 2018

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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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This report contains tourism-related data for the South West Wales region for the period 2016-2018 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. 2018 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.

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1. Overview and Key Points



In 2016-2018, South West Wales accounted for 20 per cent of overnight domestic GB trips, 19 per cent of international visits and 24 per cent of Tourism Day visits to Wales.

All tourism

The annual average spending on all tourism visitor types (overnight domestic GB trips, international visits and Tourism Day visits) in South West Wales between 2015-2017 and 2016-2018 has increased by 5 per cent to £1.282 billion. In comparison, related expenditure for Wales overall increased by 4 per cent to £6.315 billion. Please refer to [Table 1.0](#)

Overnight Domestic GB Visitors

Both South West Wales and all Wales experienced similar levels of decreases in the annual average volume of overnight domestic GB trips between 2015-2017 and 2016-2018; South West Wales decreasing by 2 per cent to 1.862 million and all Wales by 1 per cent to 9.451 million. Furthermore, related expenditure over the same period for South

West Wales decreased by 3 per cent to £374 million and for Wales overall decreased by 2 per cent to £1,723 million. Please refer to [Table 1.1](#)

International Visitors

The annual average volume of international visits to South West Wales between 2015-2017 and 2016-2018 decreased by 3 per cent to 198,000. However, related expenditure over the same time frame in South West Wales increased by a considerable 13 per cent to £95 million. In comparison, during the same period, the volume of international visits to all Wales increased by 1 per cent to 1.060 million, while related expenditure increased by 2 per cent to £446 million. Please refer to [Table 1.2](#)

Tourism Day Visits

Between 2015-2017 and 2016-2018, the annual average volume of Tourism Day visits in South West Wales increased by 9 per cent to 24 million, while related expenditure increased by 8 per cent to £813 million. In comparison, the volume of Tourism Day visits to Wales overall increased by 3 per cent to 99 million, while related expenditure increased by 8 per cent to £4,146 million. Please refer to [Table 1.3](#)

Overall spending on trips in South West Wales increased between 2015-2017 and 2016-2018

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

Source: Great Britain Tourism Survey, International Passenger Survey & Great Britain Day Visits Survey

Spend (£ millions)			
	2015-2017	2016-2018	% change
GB	£112,376	£113,583	1%
Wales	£6,052	£6,315	4%
North Wales	£1,535	£1,636	7%
Mid Wales	£740	£755	2%
South East Wales	£2,226	£2,304	4%
South West Wales	£1,218	£1,282	5%

Expenditure on all types of tourism in South West Wales in 2016-2018 had increased by 5 per cent compared with the previous period. However other regions showed greater increases, and in North Wales spending increased by 7 per cent.

Domestic overnight trips and expenditure to South West Wales decreased between 2015-2017 and 2016-2018.

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

Source: Great Britain Tourism Survey

Trips (millions)			
	2015-2017	2016-2018	% change
GB	121.519	119.562	-2%
Wales	9.593	9.451	-1%
North Wales	3.428	3.378	-1%
Mid Wales	1.740	1.887	8%
South East Wales	2.463	2.252	-9%
South West Wales	1.890	1.862	-2%
Spend (£ millions)			
	2015-2017	2016-2018	% change
GB	£23,862	£23,574	-1%
Wales	£1,764	£1,723	-2%
North Wales	£613	£626	2%
Mid Wales	£304	£314	3%
South East Wales	£422	£373	-11%
South West Wales	£384	£374	-3%

Domestic overnight trips and spending have fallen by 2 and 3 per cent respectively in South West Wales between 2015-2017 and 2016-2018 but only by 1 and 2 per cent in Wales on average. The Wales average was driven by an 8 per cent increase in overnight domestic trips in Mid Wales and smaller increases in related spending in North and Mid Wales.

International visitor expenditure to South West Wales between 2015-2017 and 2016-2018 increased more than any other region in Wales, though volume of visits decreased.

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

Source: International Passenger Survey

Visits (millions)			
	2015-2017	2016-2018	% change
GB	39.000	40.164	3%
Wales	1.050	1.060	1%
North Wales	0.298	0.303	2%
Mid Wales	0.107	0.107	0%
South East Wales	0.526	0.525	0%
South West Wales	0.203	0.198	-3%
Spend (£ millions)			
	2015-2017	2016-2018	% change
GB	£25,749	£26,631	3%
Wales	£438	£446	2%
North Wales	£92	£90	-2%
Mid Wales	£62	£54	-13%
South East Wales	£192	£196	2%
South West Wales	£84	£95	13%

The volume of international visits to South West Wales fell between 2015-2017 and 2016-2018 by 3 per cent, the largest fall of all Welsh regions, whilst overall international visits to Wales saw a slight increase of 1 per cent to 1.060 million per year. Despite a fall in the number of visits, the related spending on international visits to South West Wales increased by 13 per cent between 2015-2017 and 2016-2018, whereas overall in Wales associated spending only increased by 2 per cent.

Tourism day visits and expenditure to South West Wales increased between 2015-2017 and 2016-2018.

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

Source: Great Britain Day Visits Survey

Visits (millions)			
	2015-2017	2016-2018	% change
GB	1,794	1,777	-1%
Wales	96	99	3%
North Wales	24	25	3%
Mid Wales	11	11	0%
South East Wales	38	39	2%
South West Wales	22	24	9%
Spend (£ millions)			
	2015-2017	2016-2018	% change
GB	£62,765	£63,378	1%
Wales	£3,850	£4,146	8%
North Wales	£830	£920	11%
Mid Wales	£374	£388	4%
South East Wales	£1,612	£1,735	8%
South West Wales	£750	£813	8%

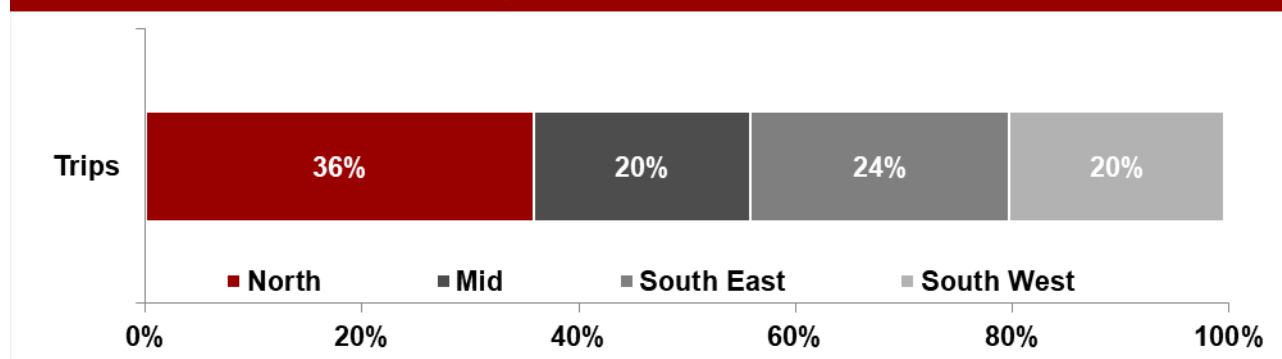
The Volume of Tourism Day visits in South West Wales increased by 9 per cent between 2015-2017 and 2016-2018, the largest increase of all regions. Related spending increased by 8 per cent over the same period, in line with the increase seen across Wales on average, but below the increase of 11 per cent in spending seen in North Wales.

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, 2016-2018, unless stated otherwise.

Figure 2.0 Proportion (%) of Overnight Domestic GB Trips to Wales by Welsh Region – Three Year Average Annual 2016-2018

Source: Great Britain Tourism Survey

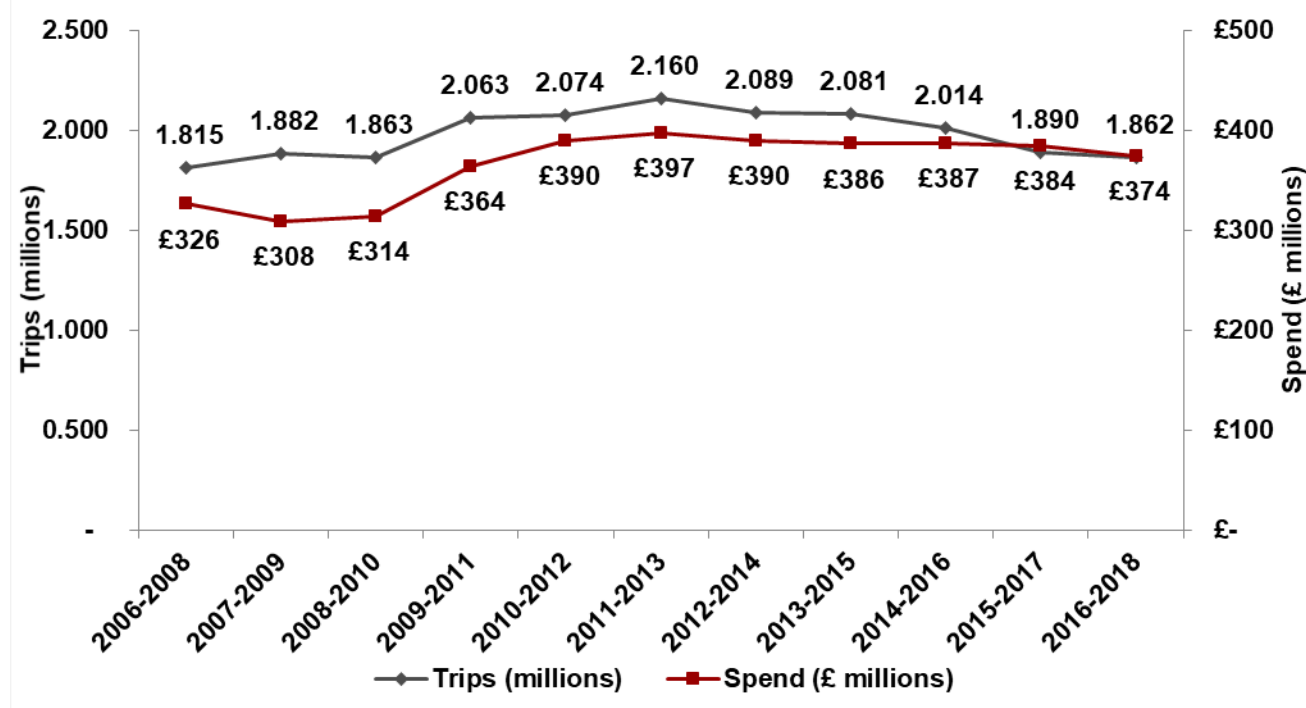


Over the period of 2016-2018, South West Wales received an average of 1,862,000 overnight domestic overnight GB trips per year. During this period these visitors generated an annual average associate spend of £374 million. South West Wales received a fifth (20 per cent) of all overnight domestic GB trips to Wales.

Volume of Trips and Related Expenditure

Figure 2.1 Overnight Domestic GB Trips (millions) and Related Expenditure (£ millions) to South West Wales - Three Year Annual Averages

Source: Great Britain Tourism Survey

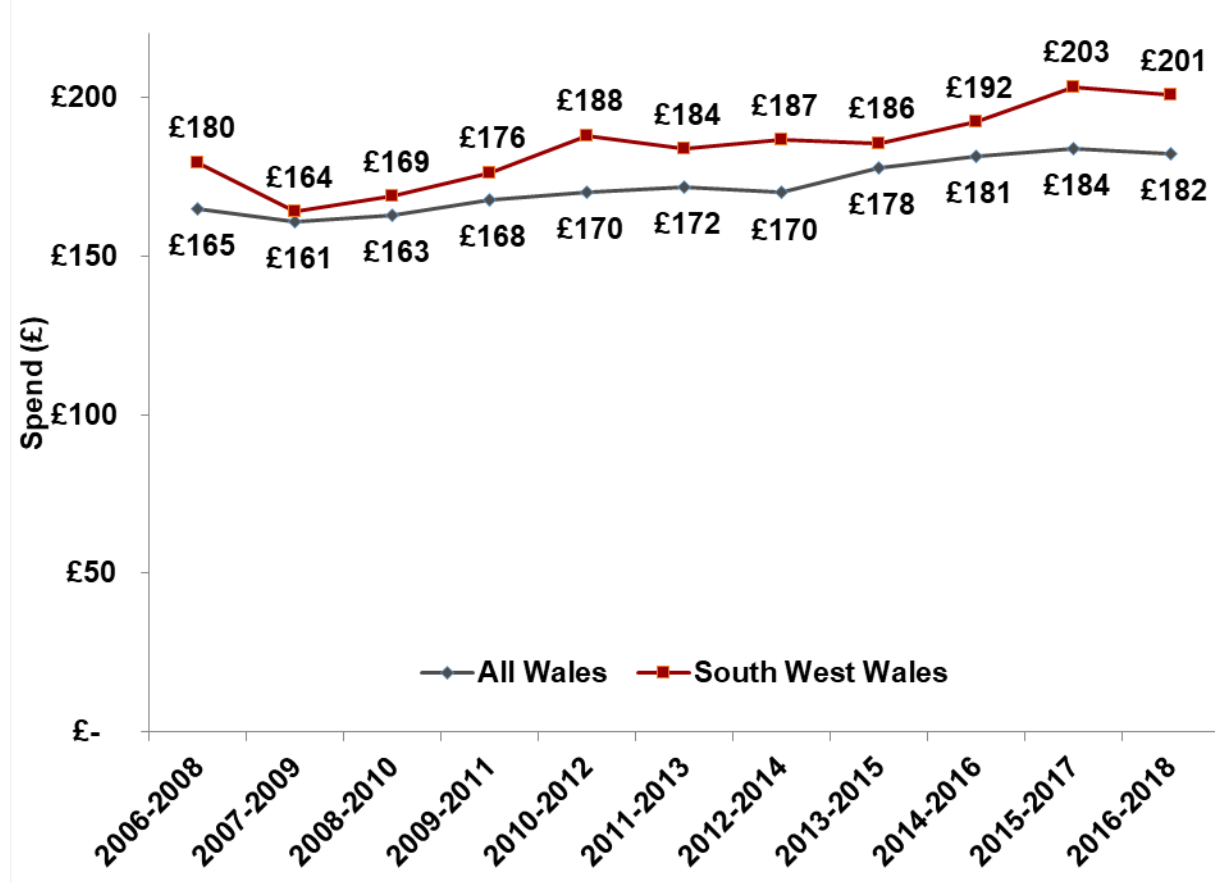


Both volume of overnight domestic GB trips and related expenditure to South West Wales peaked in 2011-2013, with 2,160,000 trips and £397 million. From then on, trips and related expenditure have continued to decrease slightly over the years.

Average Spend per Trip

Figure 2.2 Average Spend per Overnight Domestic GB Trip (£) to Wales and South West Wales - Three Year Annual Averages

Source: Great Britain Tourism Survey

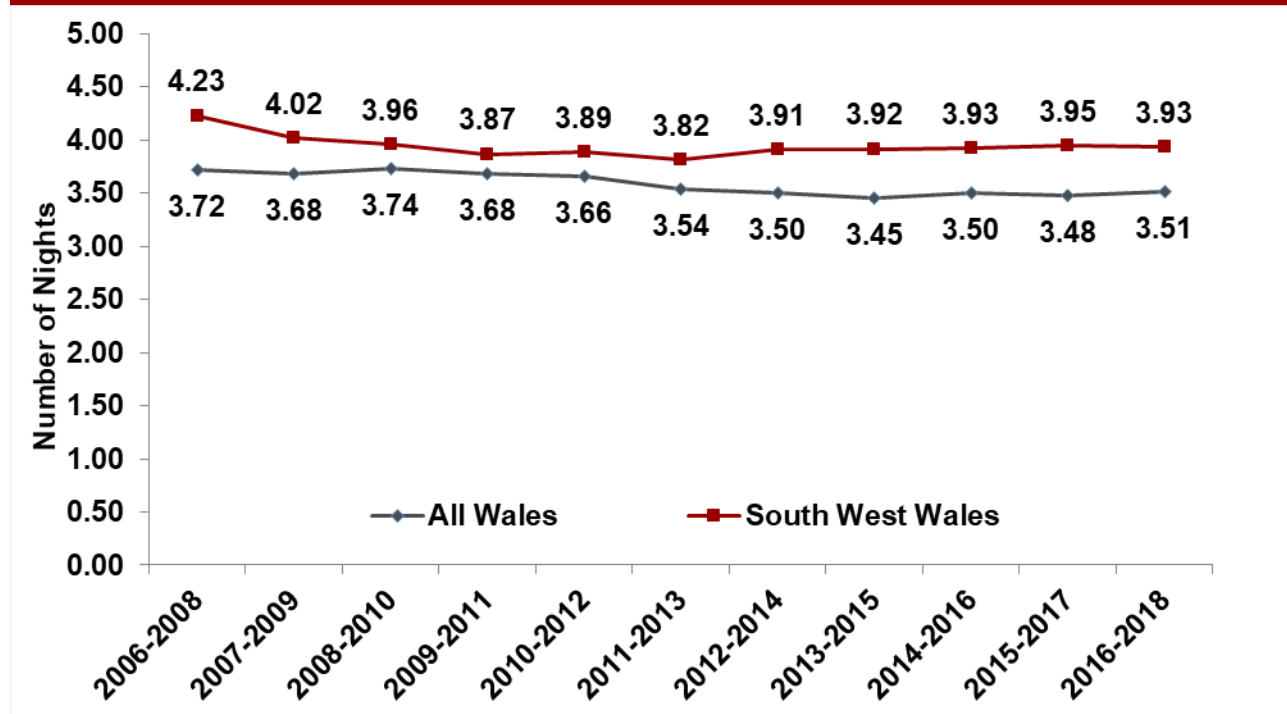


Although volume of overnight domestic GB trips and related expenditure have decreased in recent years, South West Wales, of all the Welsh regions, had the highest spend per overnight domestic GB trip in 2016-2018 at £201. In comparison, the overall Wales average for the same period was £182.

Average Number of Nights per Trip

Figure 2.3 Average Numbers of Nights per Overnight Domestic GB Trip to Wales and South West Wales – Three Year Annual Averages

Source: Great Britain Tourism Survey



The average number of nights per overnight domestic GB trip to South West Wales has consistently been higher than the all Wales average. In 2016-2018, the average number of nights per trip in South West Wales was 3.93, while the average for Wales overall was 3.51. Moreover, in 2016-2019 South West Wales had the highest average number of nights per overnight domestic GB trip of all the Welsh regions.

Purpose of Trip

Table 2.1 Volume of Overnight Domestic GB Trips (millions) by Purpose of Trip to All Wales and South West Wales – Annual Average 2016-2018

Source: Great Britain Tourism Survey

	All Wales	South West Wales
Total Trips	9.451	1.862
Holiday	5.904	1.212
Visiting Friends and Relatives	2.492	0.485
Business	0.746	0.118

During 2016-2018, more than a quarter of overnight domestic GB trips to South West Wales were to visit friends and relatives (26 per cent). In addition, 65 per cent of visitors came for a holiday, while 6

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 2.4 Proportion (%) of Overnight Domestic GB Trips to All Wales and South West Wales by Purpose of Trip – Annual Average 2016-2018

Source: Great Britain Tourism Survey



**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'.*

Duration of Holiday Trips

Figure 2.5 Proportion (%) of Overnight Domestic GB Holiday Trips to All Wales and South West Wales by Duration of Trip – Annual Average 2016-2018

Source: Great Britain Tourism Survey



For holiday visits to South West Wales in 2016-2018, the most popular length of stay was between 1-3 nights (49 per cent), and over 4 in 10 (42 per cent) stays were 4-7 nights. South West Wales had the largest proportion of holiday trips lasting 4 or more days of any Welsh region. These proportions have been relatively consistent over the last few periods, though over time there has been a small increase in the proportion of holidays lasting 8+ nights in South West Wales.

Lifestage of Holiday Trips

Table 2.2 Volume of Overnight Domestic GB Holiday Trips (millions) by Lifestage to All Wales and South West Wales – Annual Average 2016-2018

Source: Great Britain Tourism Survey

	All Wales	South West Wales
Total Holiday Trips	5.904	1.212
Pre-Nesters (16-34 unmarried & married no children)	0.672	0.120
Families (16-34 with children & 35-54 with children)	2.198	0.541
Older Independents (35-54 no children)	0.991	0.159
Empty Nesters (55+)	2.041	0.392

During 2016-2018, the majority of overnight domestic GB holiday trips to South West Wales were made by families (45 per cent), an increase from 41 per cent in 2015-2017, and higher than for Wales on average (37 per cent). Furthermore, South West Wales had a lower proportion of empty nesters (32 per cent) compared to Wales overall (35 per cent), and this decreased from 36 per cent in 2015-2017. In addition, South West Wales had a lower proportion of older independents (13 per cent) compared to all Wales (17 per cent). The proportions of older independents and pre-nesters has been relatively stable over the past few years.

Figure 2.6 Proportion (%) of Overnight Domestic GB Holiday Trips to All Wales and South West Wales by Lifestage – Annual Average 2016-2018

Source: Great Britain Tourism Survey



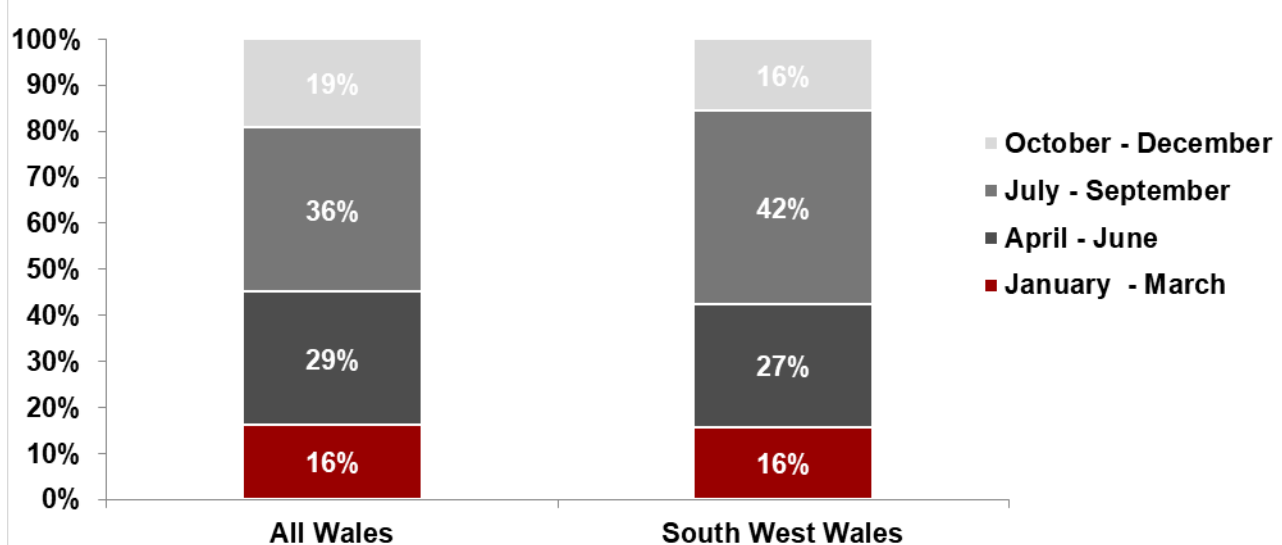
Seasonality of Trips

Figure 2.7 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 (42 per cent) or April-June (27 per cent), with Easter usually falling during the month of April.

During 2016-2018, South West Wales shared a similar seasonality pattern to that of all Wales, but saw a higher proportion of overnight trips between July and September than Wales on average (36 per cent).

Figure 2.7 Proportion (%) of Overnight Domestic GB Trips to All Wales and South West Wales by Season – Annual Average 2016-2018

Source: Great Britain Tourism Survey



Type of Place Visited

Table 2.4 Volume of Overnight Domestic GB Trips (millions) by Type of Place Visited to All Wales and South West Wales – Annual Average 2016-2018

Source: Great Britain Tourism Survey

	All Wales	South West Wales
Total Trips	9.451	1.862
Seaside	4.015	1.096
Large city / large town	1.738	0.208
Small town	1.789	0.268
Countryside / village	2.208	0.367

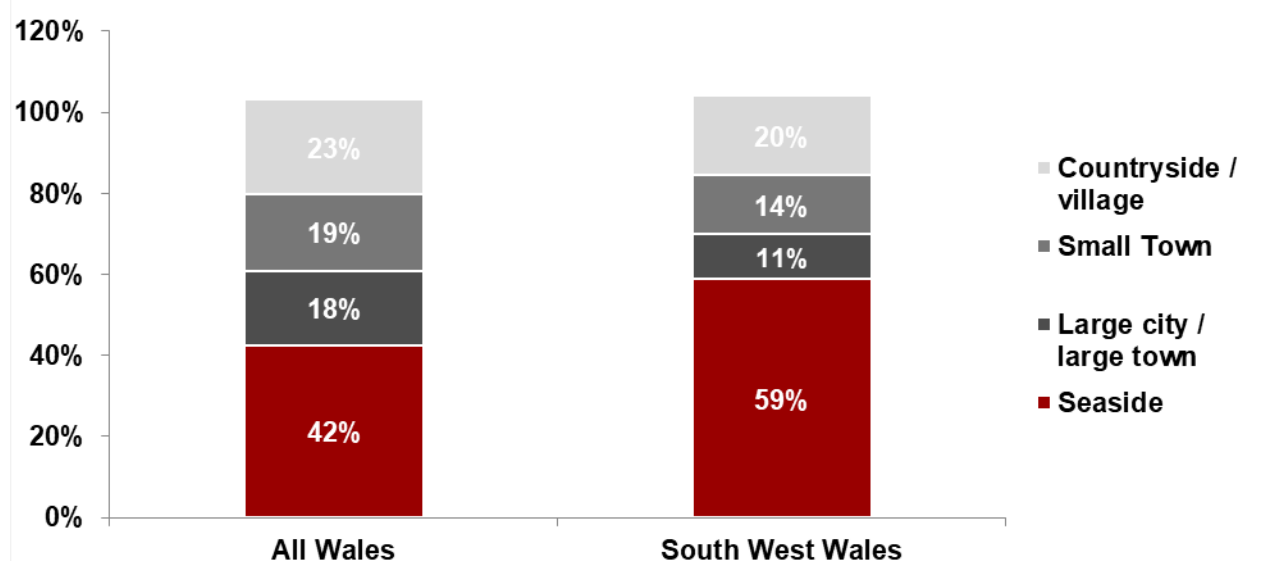
In 2016-2018 the most popular destination for overnight domestic GB trips to South West Wales was the seaside (59 per cent), a higher proportion than the overall Wales average of 42 per cent.

The least popular destination to visit on an overnight domestic GB trip to South West Wales in 2016-2018 was a large city or town (11 per cent). In contrast, during the same period, 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 (14 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 2.8 Proportion (%) of Overnight Domestic GB Trips by Type of Place Visited to All Wales and South West Wales – Annual Average 2016-2018

Source: Great Britain Tourism Survey



**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.*

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 over 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.

Please refer to [Table 8.8](#) for a full list of answer options that have been included under each accommodation type to calculate three year averages.

Table 2.5 Volume of Overnight Domestic GB Trips (millions) by Type of Accommodation Used during a trip to Wales and South West Wales – Annual Average 2016-2018

Source: Great Britain Tourism Survey

	All Wales	South West Wales
Total Trips	9.451	1.862
Hotel/Motel	2.286	0.336
Guest house/Farmhouse/B&B	0.716	0.101
Self catering	1.314	0.379
Friend's home/Relative's home/Second home/Timeshare	2.587	0.502
Caravan and Camping	2.414	0.548

During 2016-2018, South West Wales and all Wales had similar proportion for overnight domestic GB visitors staying in 'Caravan and Camping' (29 per cent and 26 per cent respectively) and 'Friend's home/Relative's home/Second home/Timeshare' (both at 27 per cent). On the other hand, South West Wales had a higher proportion of trips involving a stay in 'Self catering' than the all Wales average (20 per cent and 14 per cent respectively).

Figure 2.9 Proportion (%) of Overnight Domestic GB Trips to All Wales and South West Wales by Type of Accommodation - Annual Average 2016-2018

Source: Great Britain Tourism Survey

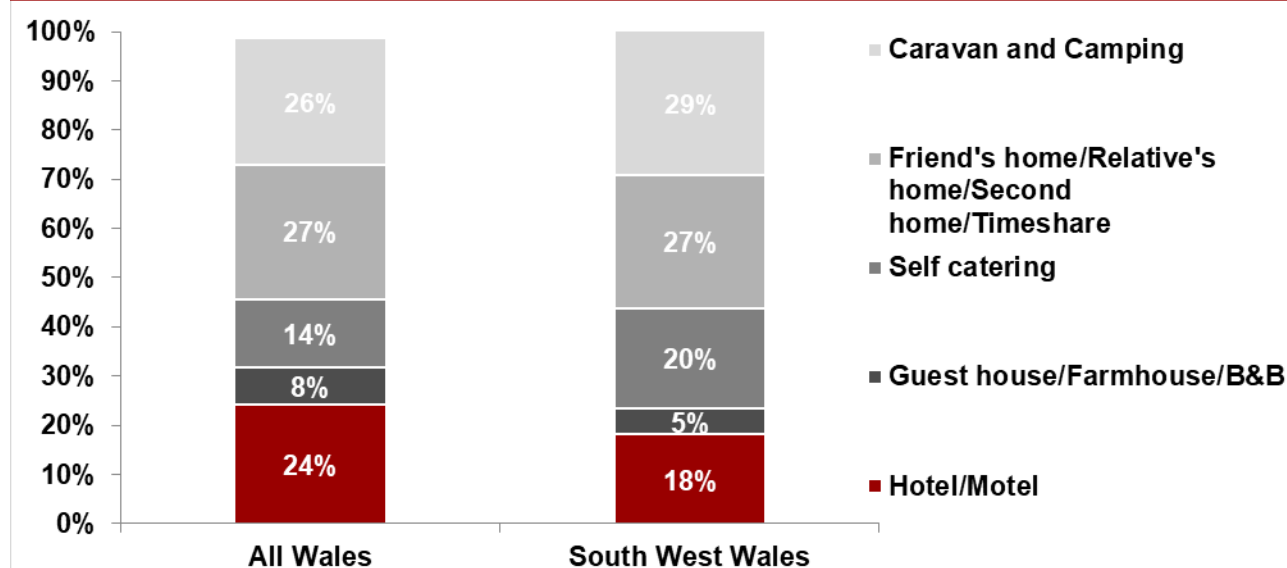


Table 2.6 Value of Related Expenditure (£ millions) from Overnight Domestic GB Trips by Type of Accommodation Used during a trip to Wales and South West Wales – Annual Average 2016-2018

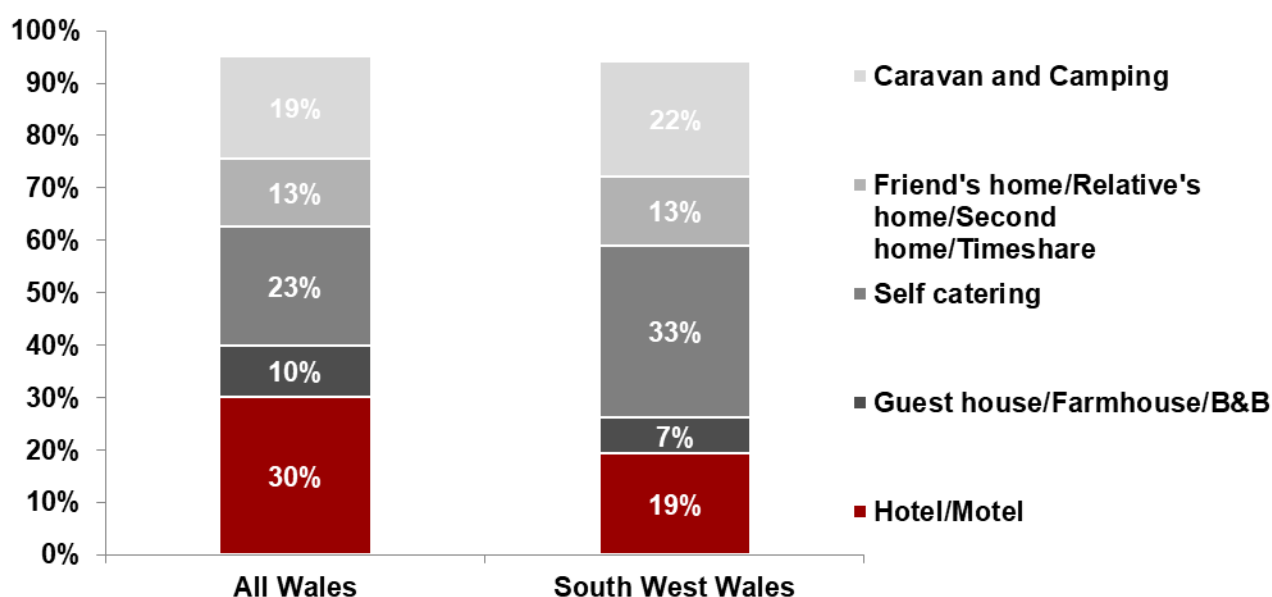
Source: Great Britain Tourism Survey

	All Wales	South West Wales
Total Expenditure	£1,723	£374
Hotel/Motel	£521	£72
Guest house/Farmhouse/B&B	£168	£26
Self catering	£392	£123
Friend's home/Relative's home/Second home/Timeshare	£222	£49
Caravan and Camping	£336	£83

In South West Wales, even though only a fifth of (20 per cent, 379,000 trips) overnight domestic GB visitors stayed in 'Self catering', this type of accommodation accounted for a third (33 per cent, £123 million) of related expenditure. This trend was also seen in all Wales, where even though only 14 per cent of overnight domestic GB trips involved a stay in 'Self catering' accommodation, these trips accounted for 23 per cent (£392 million) of related expenditure.

Figure 2.10 Proportion (%) of Related Expenditure of Overnight Domestic GB Trips to All Wales and South West Wales by Type of Accommodation – Annual Average 2016-2018

Source: Great Britain Tourism Survey



Region of Origin

Table 2.7 Volume of Overnight Domestic GB Trips (millions) by Region of Origin to All Wales and South West Wales – Annual Average 2016-2018

Source: Great Britain Tourism Survey

	All Wales	South West Wales
Total Trips	9.451	1.862
Scotland	0.120	0.017
Wales	1.631	0.502
England	7.701	1.342
North East England	0.101	0.035
North West England	1.789	0.097
Yorkshire and the Humber	0.390	0.054
East Midlands	0.567	0.092
West Midlands	1.830	0.293
East of England	0.340	0.110
London	0.637	0.115
South East England	1.018	0.270
South West England	1.028	0.277

For 2016-2018, South West Wales, had a higher proportion of overnight domestic GB trips originating from Wales (27 per cent) than seen in Wales on average (17 per cent) and a smaller proportion of English visitors (72 per cent) when compared to Wales overall, with 81 per cent.

Visitors from the West Midlands, South East England and South West England made up 45 per cent

of all overnight visitors to South West Wales in 2016-2018. Compared to Wales on average, South West Wales saw a larger proportion of visitors from South East and South West England and a smaller proportion from North West England and the West Midlands.

Table 2.8 Proportion (%) of Overnight Domestic GB Trips by Region of Origin to All Wales and South West Wales – Annual Average 2016-2018

Source: Great Britain Tourism Survey

	All Wales	South West Wales
Total Trips	100%	100%
Scotland	1%	1%
Wales	17%	27%
England	81%	72%
North East England	1%	2%
North West England	19%	5%
Yorkshire and the Humber	4%	3%
East Midlands	6%	5%
West Midlands	19%	16%
East of England	4%	6%
London	7%	6%
South East England	11%	15%
South West England	11%	15%

3. International Visitors

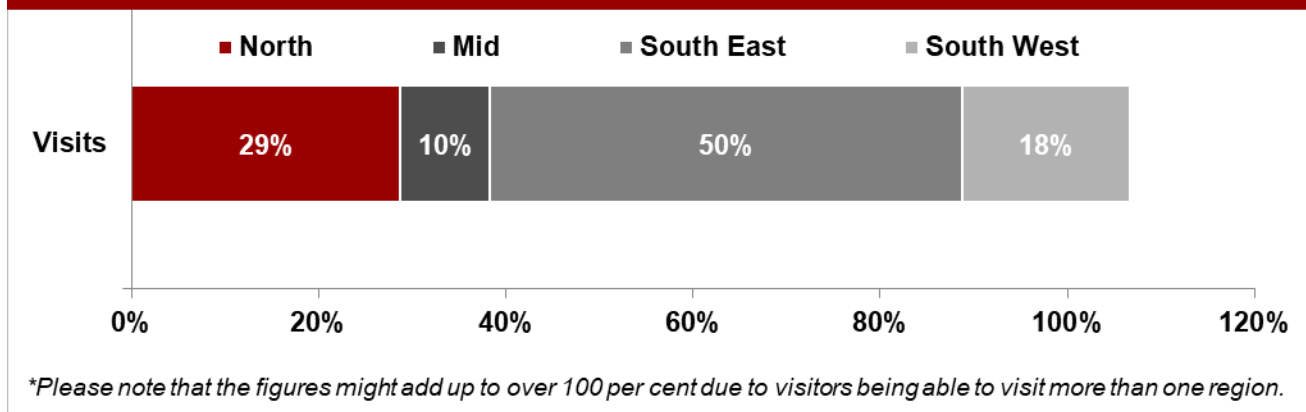
All the data used for this section has been sourced from the [International Passenger Survey](#). Figures shown are the averages taken over a period of three years, 2016-2018, unless stated otherwise.

In May 2020, the Office for National Statistics published revised estimates from the International Passenger Survey for inbound visits covering 2009 to 2019 based on an updated weighting method. Further details can be found on the [Office for National Statistics travel and tourism pages](#).

This section uses the updated data so figures for 2009 to 2018 quoted here will not match those in previous publications. Tables summarizing the original and revised data for 2009 – 2018 are in [Table 8.2](#).

Figure 3.0 Proportion (%) of International Visits to Wales by Welsh Region – Annual Average 2016-2018

Source: International Passenger Survey

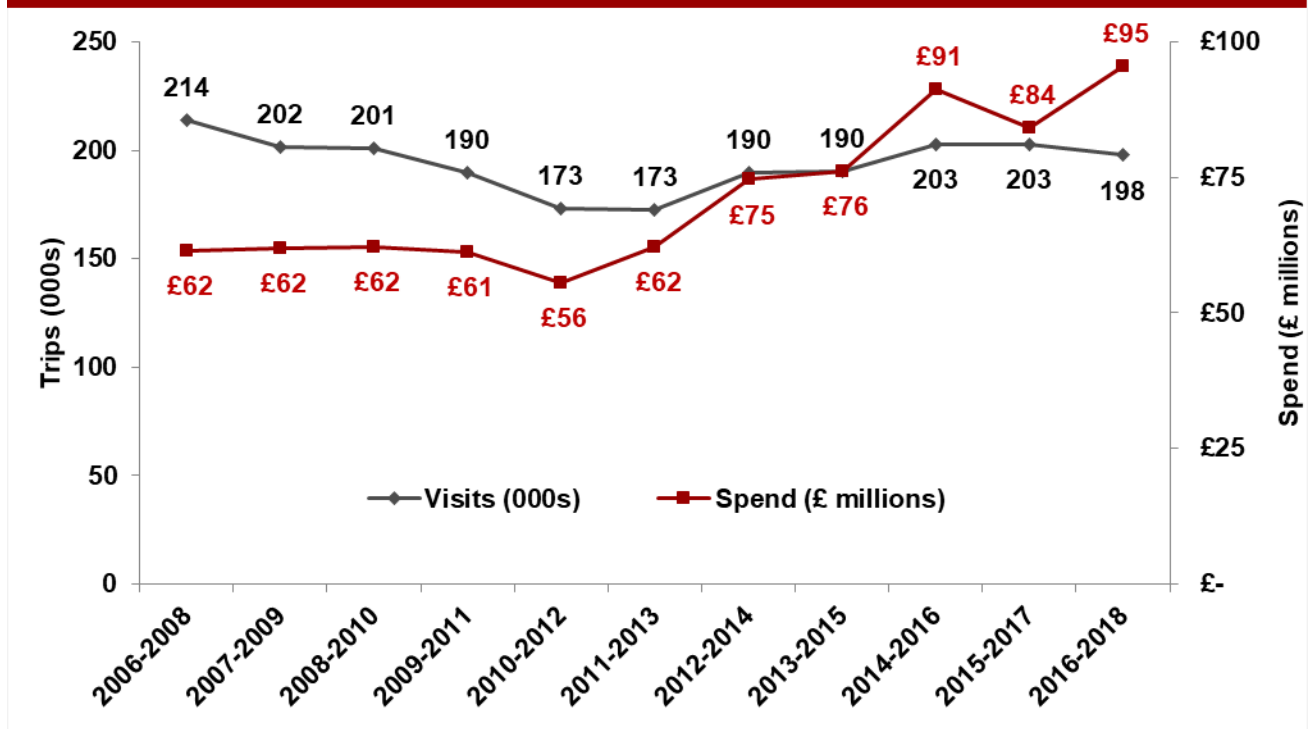


Over the period of 2016-2018, South West Wales received an annual average of 198,000 international visits per year. Over this same period these visits have contributed an average of £95 million per year to the Welsh economy. South West Wales received just under a fifth (18 per cent) of all international visits to Wales.

Volume of Visits and Related Expenditure

Figure 3.1 Volume of International Visits (000s) and Related Expenditure (£ millions) to South West Wales - Three Year Annual Averages

Source: International Passenger Survey

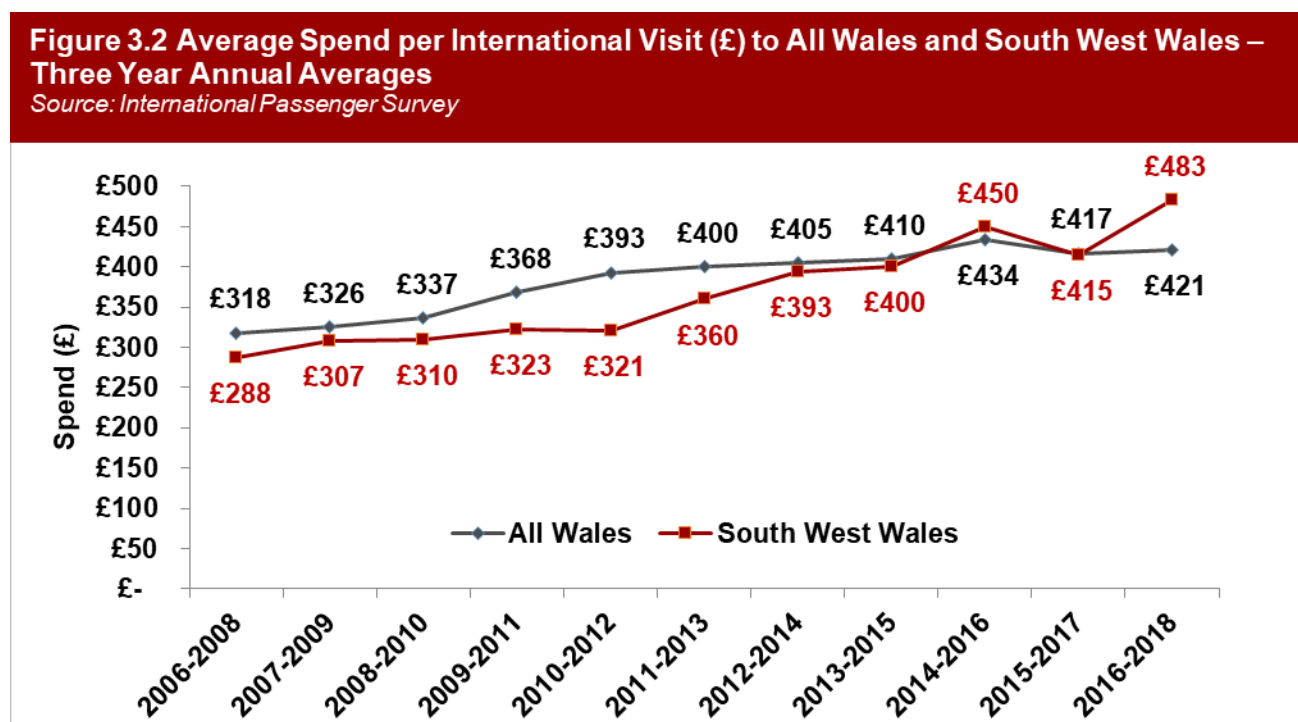


The related expenditure from international visits to South West Wales has increased from a low of £56 million in 2010-2012 to £95 million in 2016-2018, this has been a continuous increase with the

exception of 2015-2017 which saw a dip to £84 million.

The volume of international visits to South West Wales decreased steadily from 214,000 in 2006-2008 to a low of 173,000 in 2010-2012. This was followed by a slow recovery, reaching 203,000 in 2014-2016, before dipping in 2016-2018 to 198,000.

Average Spend per Visit

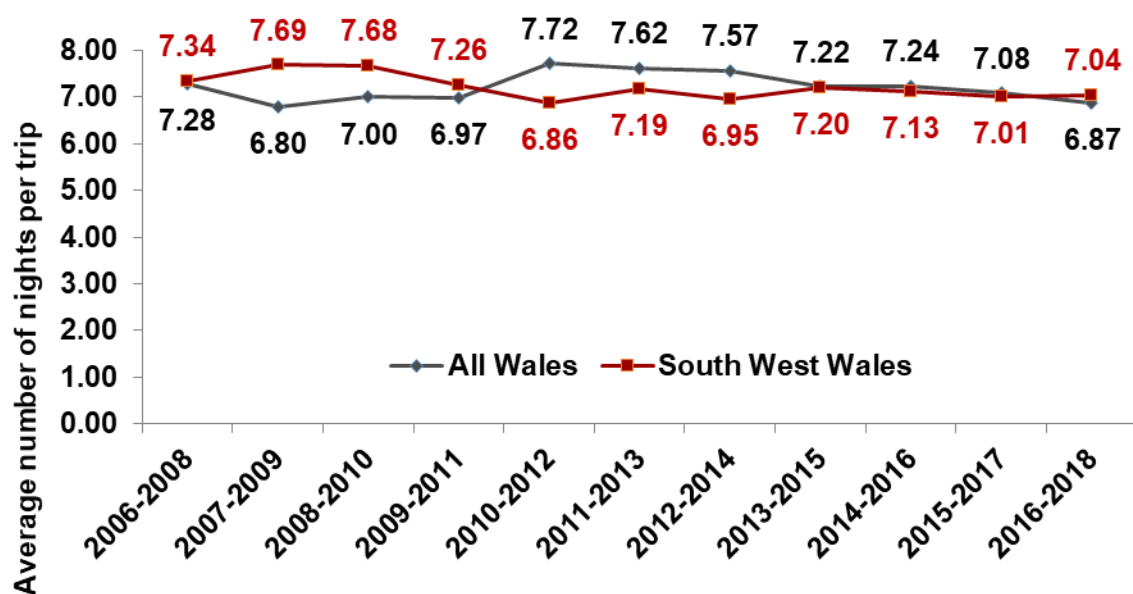


The average spend per international visit to South West Wales was consistently below the Wales average until 2014-2016. In 2016-2018 the average spend per international visit to South West Wales rose to £483 from £415 in 2015-2017, well above the Wales average of £421 which shows a steady increase over the period covered.

Average Number of Nights per Visit

Figure 3.3 Average Number of Nights per International Visit to Wales and South West Wales - Three Year Annual Averages.

Source: International Passenger Survey



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. Following this, between 2010-2012 and 2013-2015 the South West Wales average was below the all Wales average.

Since 2013-2015, the average number of nights spent by international visitors to South West Wales has remained similar to the all Wales average, and in 2016-2018 was 7.04 nights, comparable to the all Wales average of 6.87 nights.

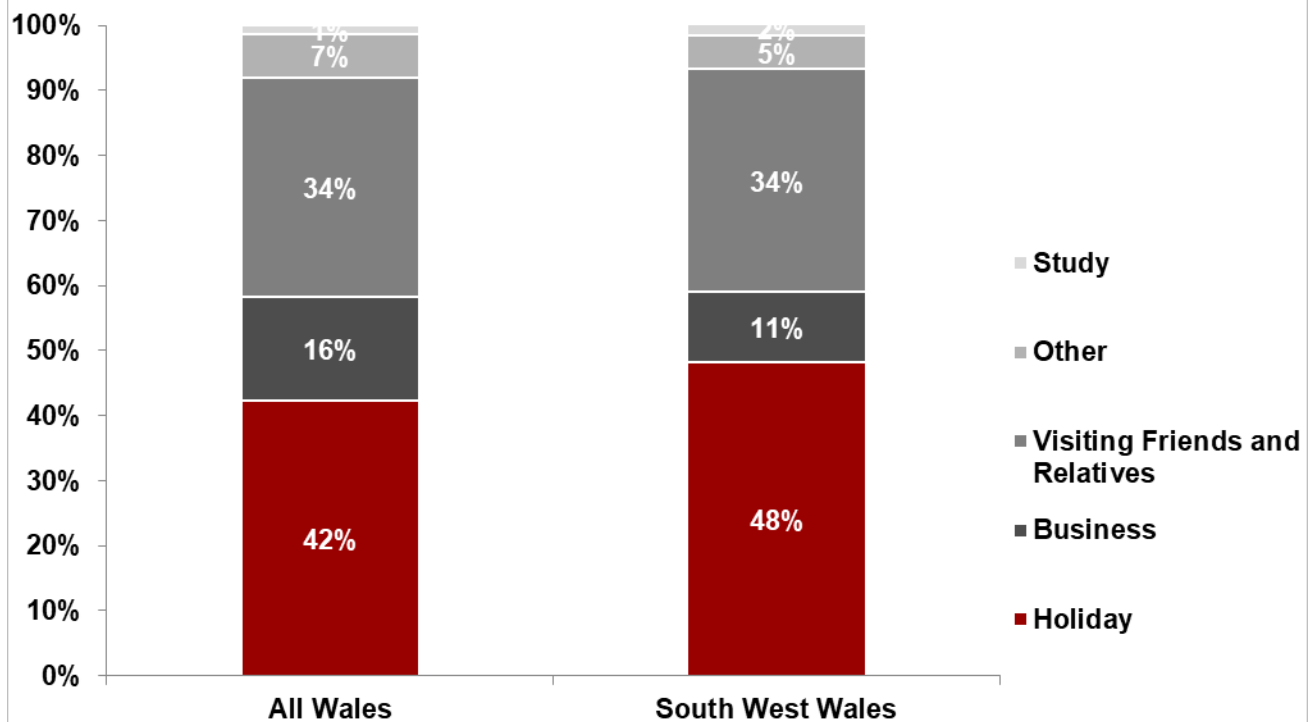
Purpose of Trip

Table 3.1 Volume of International Visits (000s) by Purpose of Trip to All Wales and South West Wales – Annual Average 2016-2018

Source: International Passenger Survey

	All Wales	South West Wales
Total Trips	1,060	198
Holiday	449	95
Business	168	21
Visiting Friends and Relatives	358	68
Other	70	10
Study	14	5

Figure 3.4 Proportion (%) of International Visits to All Wales and South West Wales by Purpose of Trip – Annual Average 2016-2018
Source: *International Passenger Survey*



During 2016-2018, 48 per cent of all the international visitors to South West Wales came for a holiday, a higher proportion than the overall Wales average of 42 per cent. In contrast, South West Wales received 11 per cent of international business visits, below the Wales average of 16 per cent.

Table 3.2 Related Expenditure (£ millions) of International Visits by Purpose of Trip to All Wales and South West Wales – Annual Average 2016-2018
Source: *International Passenger Survey*

	All Wales	South West Wales
Total Expenditure	£446	£95
Holiday	£179	£34
Business	£56	£6
Visiting Friends and Relatives	£123	£27
Other	£26	£3
Study	£62	£38

As seen across all four Welsh regions, international visitors coming to study account for a larger proportion of related expenditure in relation to the volume of visits. In 2016-2018, the 2 per cent of international visitors coming to South West Wales to study accounted for two fifths (40 per cent) of all related expenditure from international visitors to the region. Conversely, international holiday

visitors accounted for almost half of the volume of trips in 2016-2018, but only one third (35 per cent) of related expenditure.

Figure 3.5 Proportion (%) of Related Expenditure of International Visits to All Wales and South West Wales by Purpose of Trip – Annual Average 2016-2018

Source: International Passenger Survey



Country of Origin

Please note that table 3.3 shows only the top ten countries of origin of international visitors by volume of visits to South West Wales and all Wales.

Table 3.3 Top 10 Countries of Origin of International Visits by Volume of Visits (000s) with proportions (%) to All Wales and South West Wales – Annual Average 2016-2018

Source: International Passenger Survey

All Wales			South West Wales		
All Visits	1,060	100%	All Visits	198	100%
1. Ireland	174	16%	1. Ireland	45	23%
2. USA	98	9%	2. Germany	18	9%
3. Germany	81	8%	3. France	14	7%
4. France	78	7%	4. USA	13	7%
5. Netherlands	56	5%	5. Australia	11	6%
6. Australia	56	5%	6. Netherlands	10	5%
7. Spain	49	5%	7. Spain	9	4%
8. Poland	45	4%	8. Italy	9	4%
9. Italy	43	4%	9. Poland	8	4%
10. Canada	34	3%	10. Belgium	6	3%

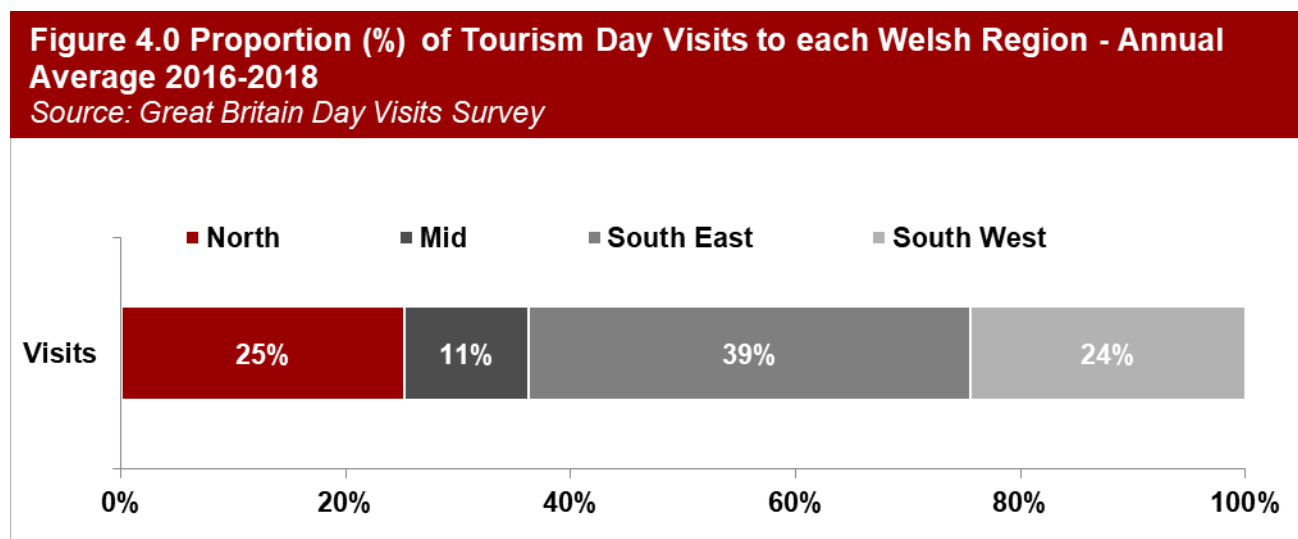
The most common country of origin for international visitors to South West Wales was Ireland (23 per cent), followed by Germany (9 per cent) and France (7 per cent).

The top 10 countries of origin for international visitors to South West Wales in 2016-2018 mirrored those for Wales on average, with the exception of Canada which does not feature in the top 10 for South West Wales, being replaced at number 10 by Belgium.

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 for other leisure day visits can be found in the Great Britain Day Visits [Annual reports](#). Figures shown, unless otherwise stated, are the averages taken over three years: 2016-2018.

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 published.

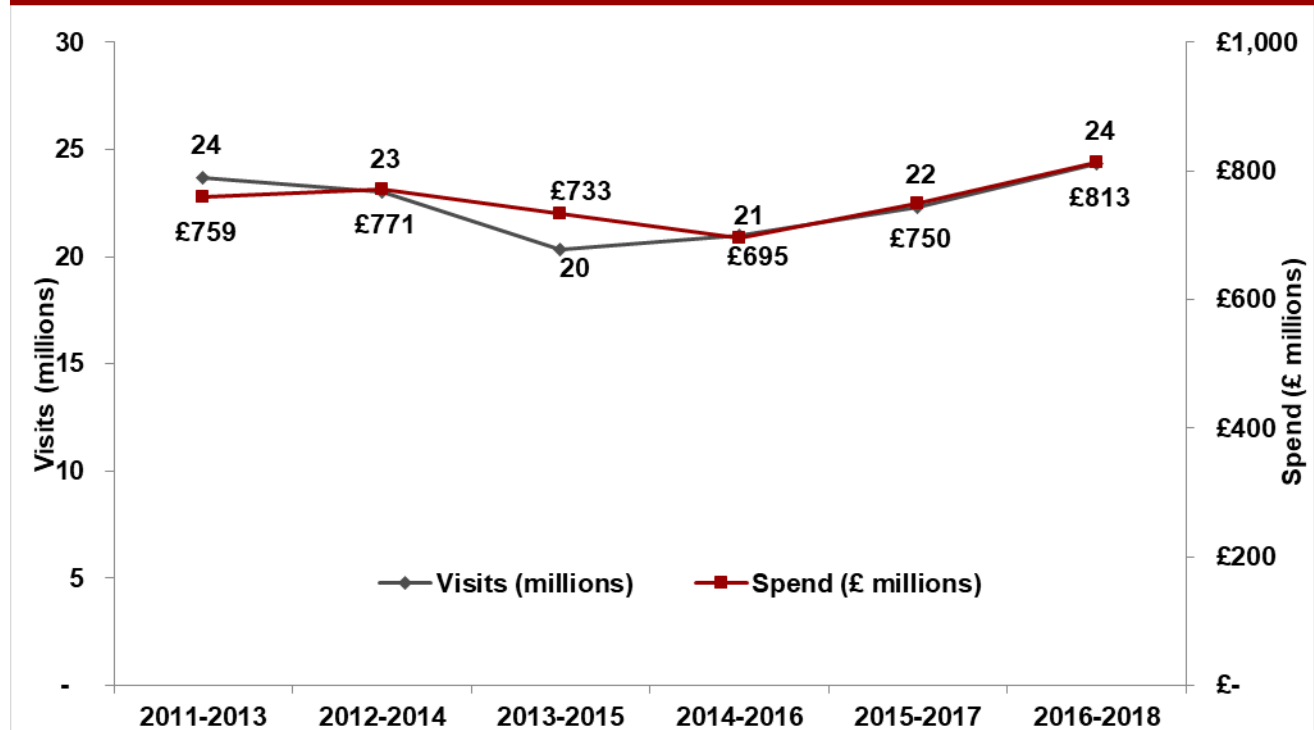


During 2016-2018, South West Wales received an annual average of 24 million Tourism Day visits with a related expenditure of £813 million. South West Wales accounted for 24 per cent of all Tourism Day visits to Wales.

Tourism Day Visits and Related Expenditure

Figure 4.1 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) to South West Wales - Three Year Annual Averages

Source: Great Britain Day Visits Survey

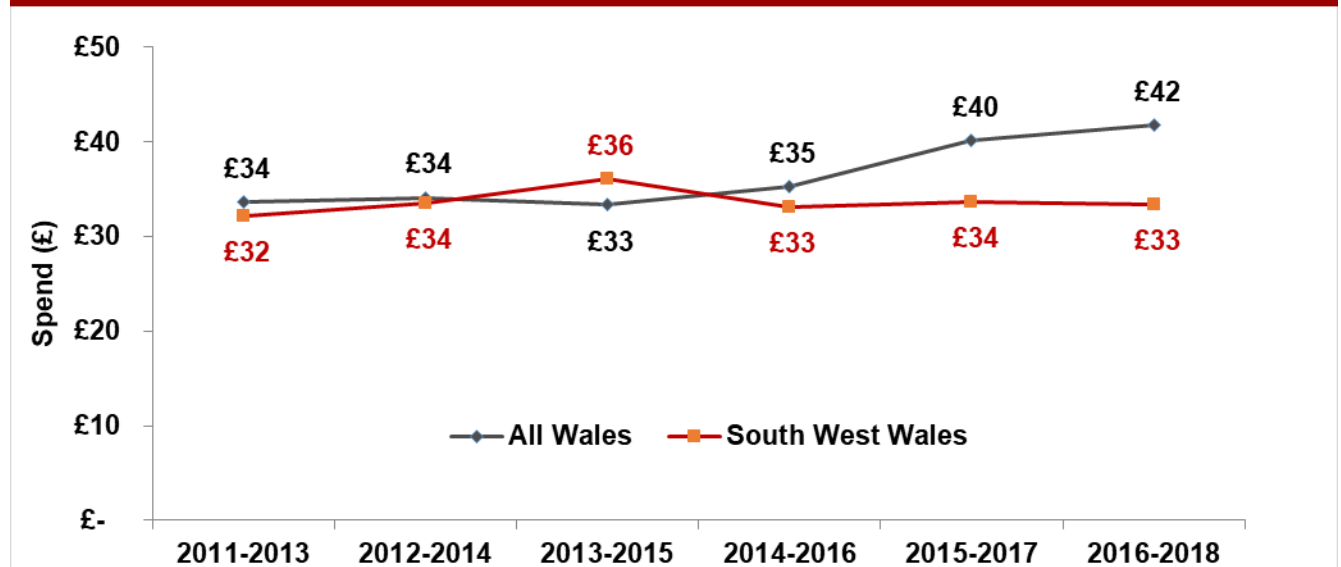


The volume of Tourism Day visits to South West Wales between 2014-2016 and 2016-2018 has steadily increased from 21 million to 24 million visits, while related expenditure has also increased, from £695 million to £813 million.

Average Spend per Visit

Figure 4.2 Average Spend per Tourism Day Visit (£) to All Wales and South West Wales - Three Year Annual Averages

Source: Great Britain Day Visits Survey



Average spend per Tourism Day visit to South West Wales has been lower than the all Wales average since 2011-2013, except for in 2013-2015. Whilst average spend per visit in South West Wales has remained relatively level since 2014-2019 at £33 or £34, for Wales overall this has increased in recent years to reach £42 in 2016-2018.

Activities Undertaken

Table 4.1 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 2016-2018

Source: Great Britain Day Visits Survey

All Wales			South West Wales		
All Visits	99.3	100%	All Visits	24.3	100%
Visiting friends or family	22.3	22%	Visiting friends or family	5.3	22%
Going out for a meal	11.0	11%	Going out for a meal	2.6	11%
Outdoor activities	9.7	10%	Outdoor activities	2.7	11%
General day out	9.0	9%	General day out	2.3	9%
Going on a night out	7.3	7%	Going on a night out	1.7	7%
Special shopping	6.3	6%	Special shopping	1.4	6%
Going out for entertainment	5.0	5%	Going out for entertainment	1.2	5%
Going to visitor attractions	4.7	5%	Going to visitor attractions	1.3	5%
Watching live sporting events	3.3	3%	Watching live sporting events	1.2	5%
Special personal events	3.0	3%	Special personal events	0.8	3%
Special public events	2.3	2%	Special public events	0.5	2%
Taking part in sports	1.3	1%	Taking part in sports	0.5	2%
Day out to health/beauty spa	0.7	1%	Day out to health/beauty spa	0.2	1%
Other leisure/ hobbies	2.3	2%	Other leisure/ hobbies	0.4	2%
Other day out for leisure	3.0	3%	Other day out for leisure	0.6	2%

Just over a fifth (22 per cent) of Tourism Day visits in South West Wales in 2016-2018, 5.3 million, were to visit friends or family, 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 22 per cent. A slightly higher proportion of visits to South West Wales were to watch a live sporting event (5 per cent) compared to Wales on average (3 per cent).

Type of Place Visited

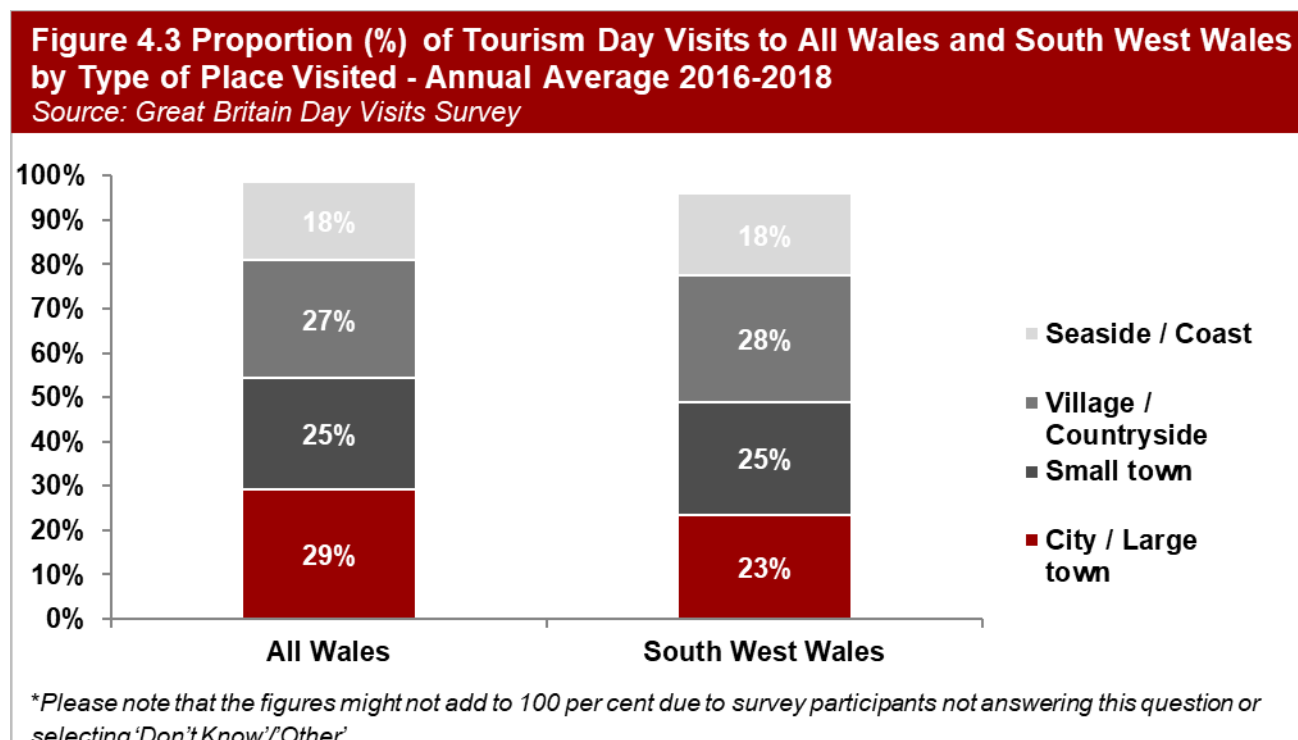
Table 4.2 Volume of Tourism Day Visits (millions) by Type of Place Visited to All Wales and South West Wales – Annual Average 2016-2018

Source: Great Britain Day Visits Survey

	All Wales	South West Wales
Total Visits	99	24
City / Large town	29	6
Small town	25	6
Village / Countryside	26	7
Seaside / Coast	18	4

During 2016-2018 in South West Wales, the type of location most visited on a Tourism Day visit was the village/countryside, with 7 million (28 per cent) Tourism Day visitors choosing this kind of place. The distribution of types of place visited for Tourism Day trips differ from that for overnight visits, of which 20 per cent were to a village / countryside, and 59 per cent were to the seaside / coast (see [Figure 2.8](#)).

South West Wales had a smaller proportion than for Wales overall of Tourism Day visits to a city or large town (23 per cent and 29 per cent respectively).



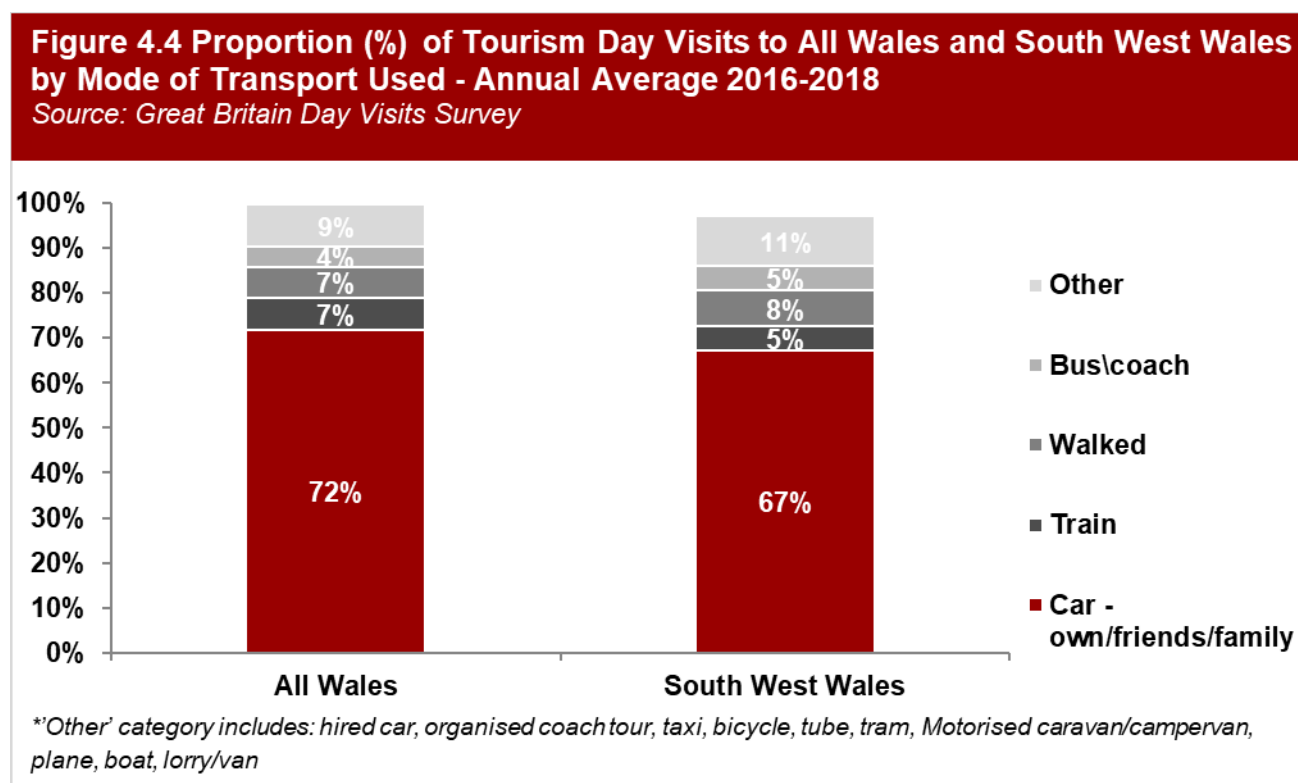
Mode of Transport Used

Table 4.3 Volume of Tourism Day Visits (millions) by Mode of Transport to All Wales and South West Wales – Annual Average 2016-2018
Source: Great Britain Day Visits Survey

	All Wales	South West Wales
Total Visits	99	24
Car - own/friends/family	71	16
Train	7	1
Walked	7	2
Bus\coach	4	1
Other	9	3

Like all the other regions in Wales, the car is the most preferred mode of transportation in South West Wales, with the majority (67 per cent) of Tourism Day visitors choosing to travel this way.

As seen in Figure 4.4, the proportions of mode of transport used on a Tourism Day visit to South West Wales are similar to those for Wales on average, with slightly more in South West Wales using other modes of transport, and slightly fewer using cars and trains, compared to Wales overall.



Distance Travelled

Table 4.4 Volume of Tourism Day Visits (millions) by Distance Travelled in All Wales and South West Wales – Three Year Average 2016-2018		
Source: Great Britain Day Visits Survey		
	All Wales	South West Wales
Total Visits	99	24
Less than 5 miles	14	4
Between 5 and 10 miles	15	4
11 to 20 miles	17	4
21 to 40 miles	14	3
41 to 100 miles	18	4
Over 100 miles	16	3

**Please note that the travel distance categories vary in size.*

The distribution of distances travelled for Tourism Day visits during 2016-2018 in South West Wales follows the approximate distribution for Wales on average. For both South West Wales, and Wales on average, around 3 in 10 (29 per cent) Tourism Day visits involved travelling 0-10 miles.

Figure 4.5 Proportion (%) of Tourism Day Visits to All Wales and South West Wales by Distance Travelled - Annual Average 2016-2018

Source: Great Britain Day Visits Survey



*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'.

Region of Residence

Table 4.5 Volume (millions) and Proportion (%) of Tourism Day Visits to South West Wales by Region of Residence – Annual Average 2016-2018

Source: Great Britain Day Visits Survey

	South West Wales	
All Visits	24	100%
South West Wales	12.60	52%
South East Wales	1.99	8%
East of England	1.49	6%
South West England	1.38	6%
West Midlands	1.28	5%
London	1.18	5%
East Midlands	1.09	4%
South East England	1.06	4%
North West England	0.84	3%
Mid Wales	0.40	2%
Yorkshire and The Humber	0.39	2%
North East England	0.33	1%
North Wales	0.08	0%
Scotland	0.07	0%

During 2016-2018, the largest proportion of Tourism Day visitors in all four regions originated from the Welsh region in question. Over half of the Tourism Day visits to South West Wales originated from South West Wales itself (52 per cent, 12.60 million).

The second most common region of origin of Tourism Day visits to South West Wales in 2016-2018 was South East Wales with an average of 1.99 million Tourism Day visitors (8 per cent) from this area.

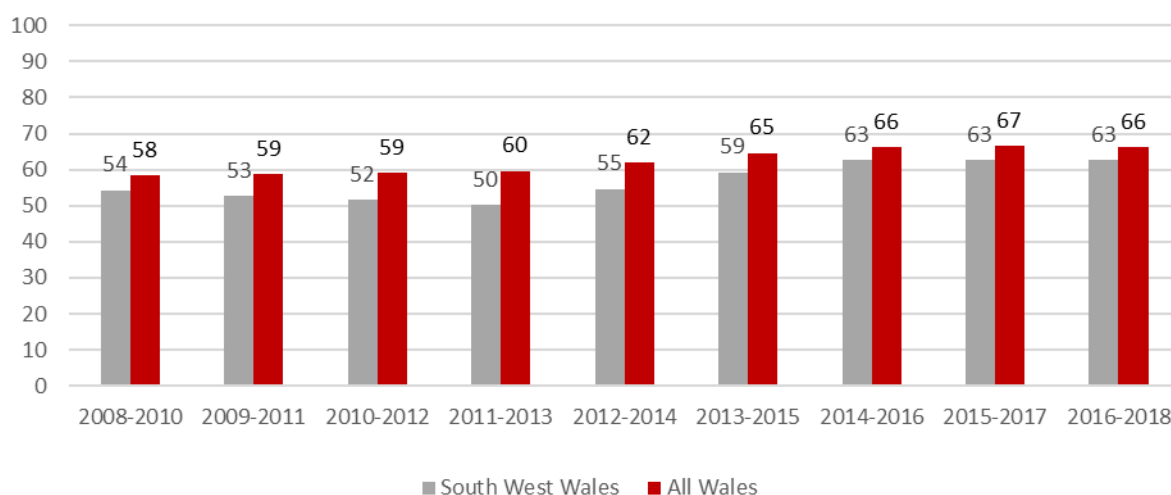
5. Accommodation Occupancy Rates

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, 2016-2018, unless stated otherwise.

Hotels

Figure 5.0 Three Year Annual Average Hotel Room Occupancy Rates for All Wales and South West Wales

Source: Visit Wales Occupancy Survey

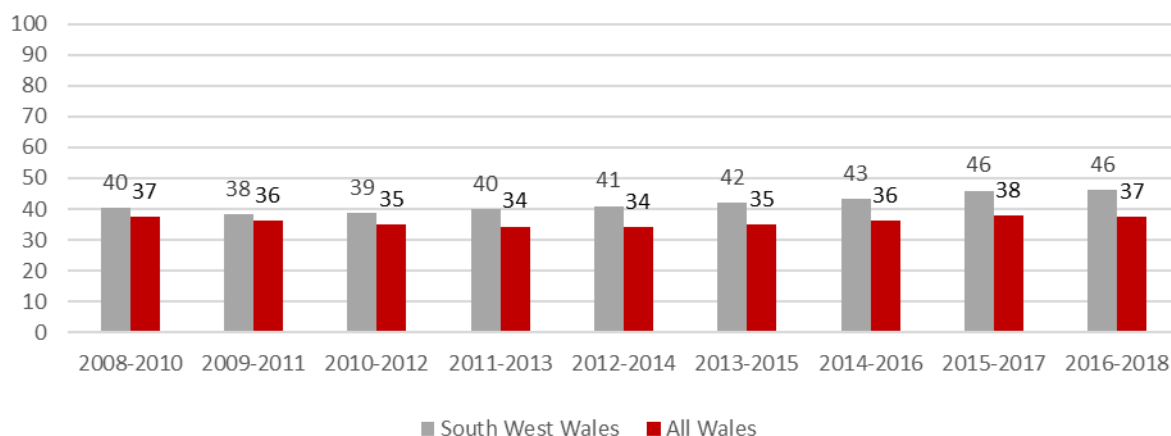


Hotel room occupancy rates in South West Wales have continuously increased over the years, reaching 63 per cent in 2016-2018. However, this was below the all Wales average of 66 per cent.

Guesthouses and B&Bs

Figure 5.1 Three Year Annual Average Guesthouse and B&B Room Occupancy Rates for All Wales and South West Wales

Source: Visit Wales Occupancy Survey

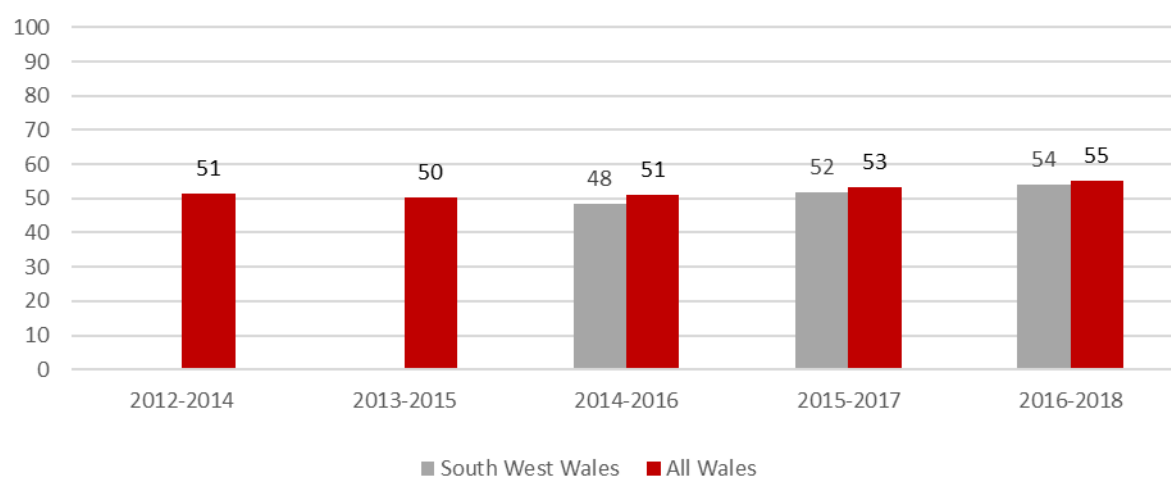


Even though Guesthouse/B&B room occupancy rates have only slightly increased since 2015-2017, South West Wales had the highest rate of all the Welsh regions in 2016-2018 at 46 per cent. In comparison, the all Wales average during the same period was 37 per cent.

Self-Catering

Figure 5.2 Three Year Annual Average Self-Catering Unit Occupancy Rates for All Wales and South West Wales

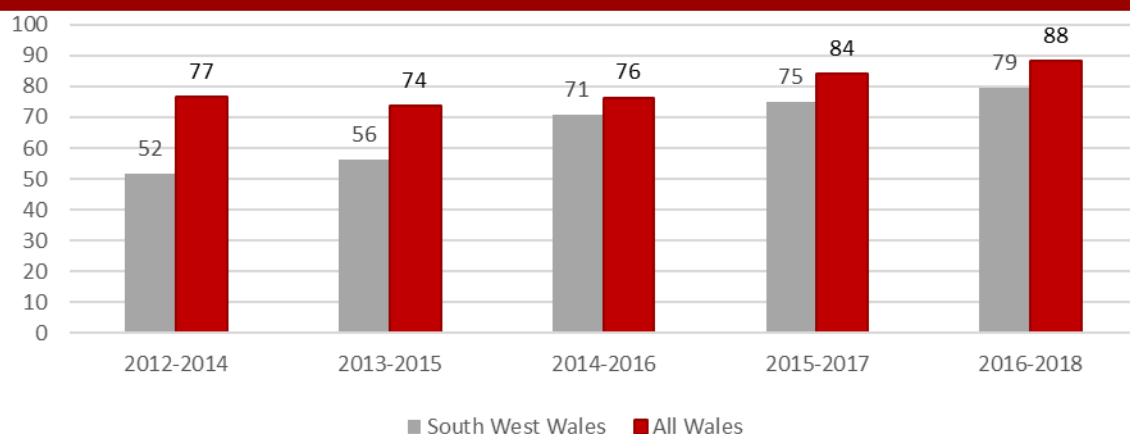
Source: Visit Wales Occupancy Survey



Following slight increases over recent years, self-catering unit occupancy rates for South West Wales in 2016-2018, at 54 per cent, remain close to that of the all Wales average of 55 per cent.

Static Caravan and Holiday Homes

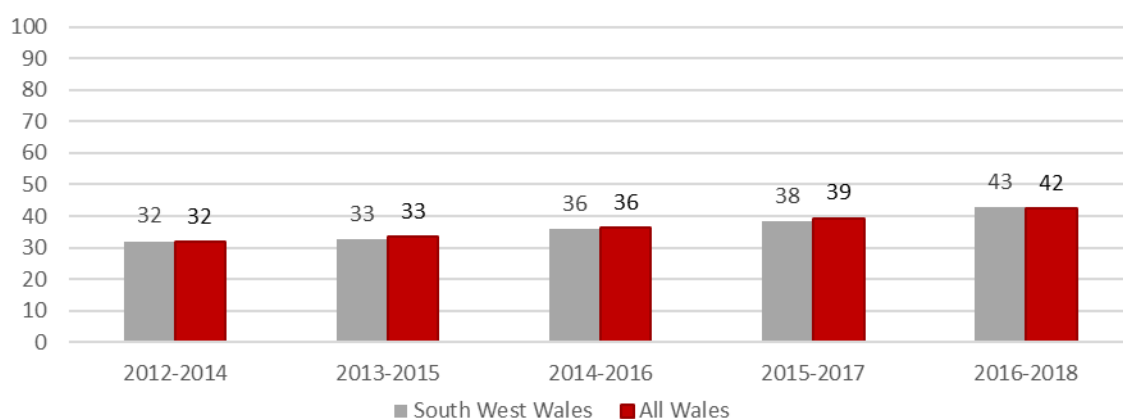
Figure 5.3 Three Year May to October Average Static Caravan and Holiday Homes Unit Occupancy Rates (%) for All Wales and South West Wales
Source: Visit Wales Occupancy Survey



Unit occupancy rates for static caravan and holiday homes in South West Wales have increased sharply since the start of the data series, to reach 79 per cent in 2016-2018. However, they have consistently been, and are still, below the all Wales average of 88 per cent.

Touring Caravan and Camping

Figure 5.4 Three Year May to October Average Touring Caravan and Camping Pitch Occupancy Rates (%) for All Wales and South West Wales
Source: Visit Wales Occupancy Survey

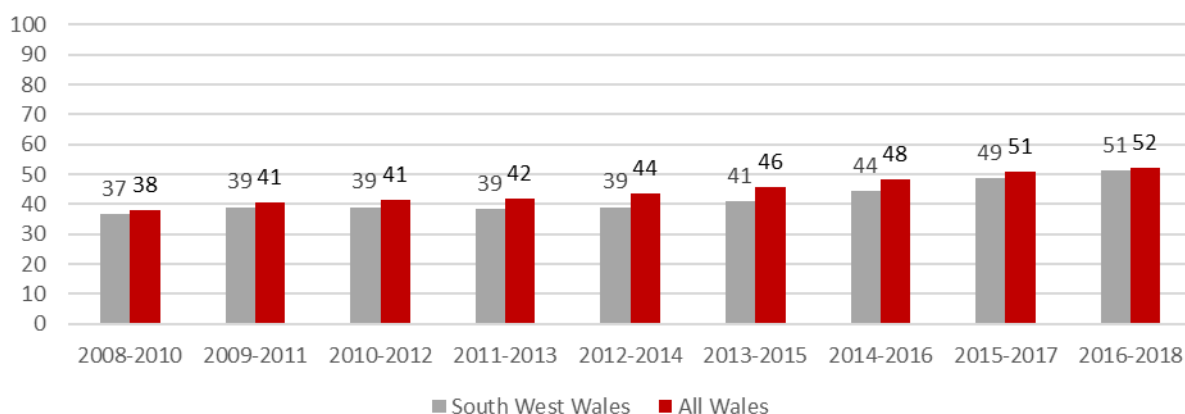


Pitch occupancy for touring caravan and camping in South West Wales has been similar to the Wales average since 2012-2014, and having increased steadily in the last few years, reached 43 per cent in 2016-2018.

Hostels

Figure 5.5 Three Year Annual Average Hostel Bedspace Occupancy Rates for All Wales and South West Wales

Source: Visit Wales Occupancy Survey



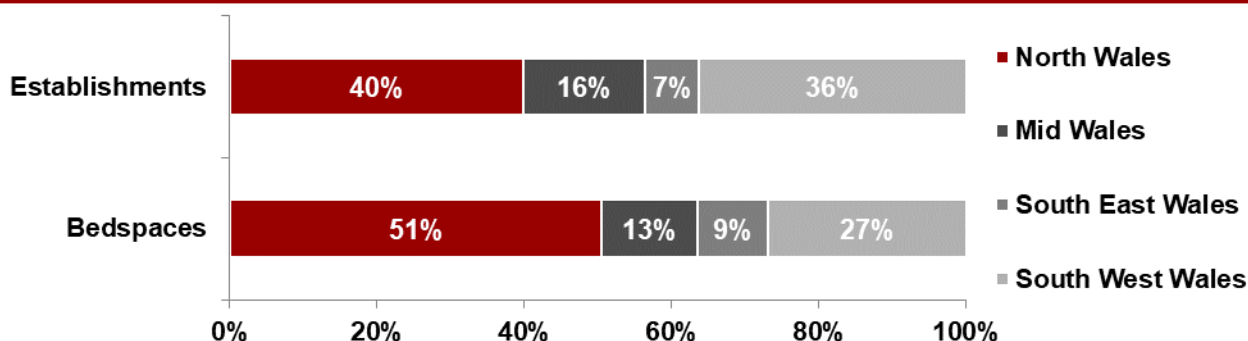
South West Wales had slightly lower hostel occupancy for 2016-2018 (51 per cent) than the all Wales average of 52 per cent.

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.

Figure 6.0 Proportion (%) of Accommodation Bedstock Establishments and Bedspaces in Wales by Welsh Region – 2013

Source: Visit Wales Bedstock Survey



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

Source: Visit Wales Bedstock Survey

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

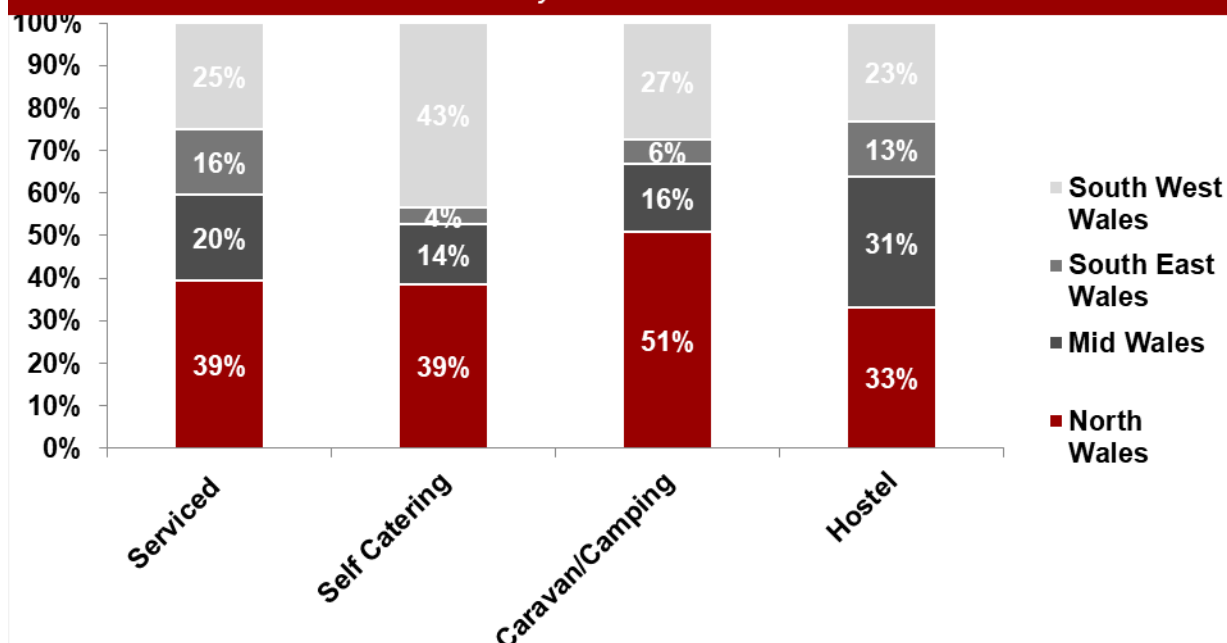
Source: Visit Wales Bedstock Survey

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

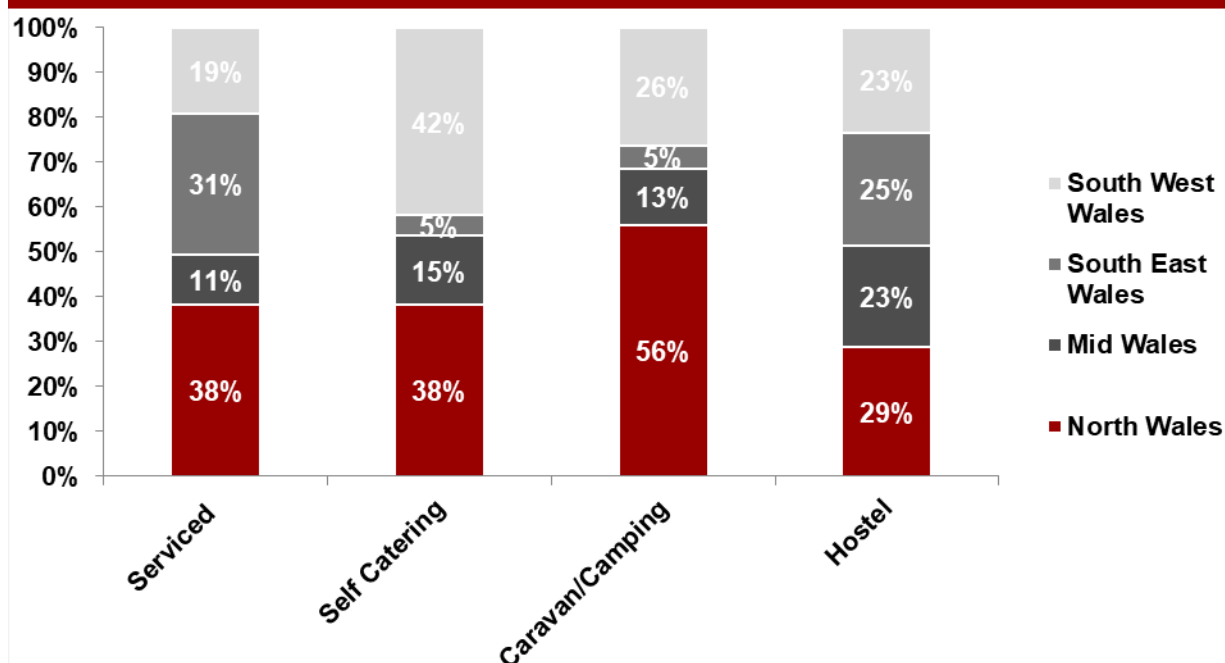
Source: Visit Wales Bedstock Survey



In addition, as seen in in Figure 6.1, 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, over two fifths (43 per cent) of the self-catering accommodation establishments in Wales are based in South West Wales.

Figure 6.2 Proportion (%) of Accommodation Bedstock Bedspaces in Wales by Welsh region - 2013

Source: Visit Wales Bedstock Survey



The proportion of accommodation bedspaces (Figure 6.2) 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).

7. Tourism Sector Employment

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

Although Wales increased the number of those employed in the Tourism Sector by 4 per cent, from 127,300 in 2017 to 132,300 in 2018, South West Wales experienced a decreased of 4 per cent in its tourism sector employment from 29,600 to 28,400.

Figure 7.0 Number Employed (000s) per year in the Tourism Sector in All Wales and South West Wales

Source: Welsh Government Economic Stats

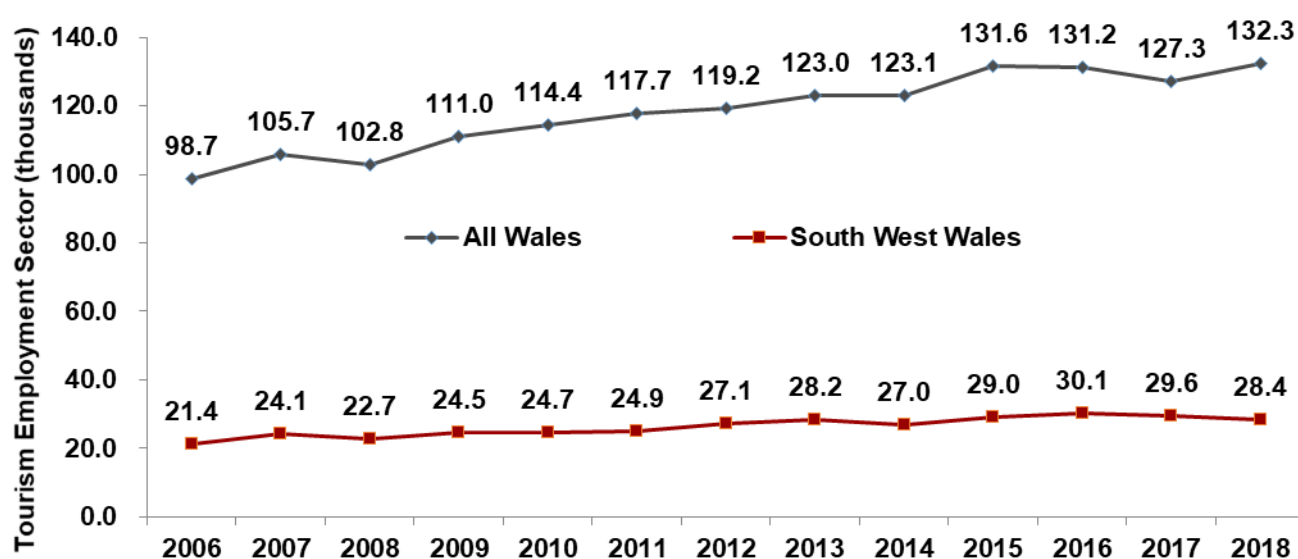
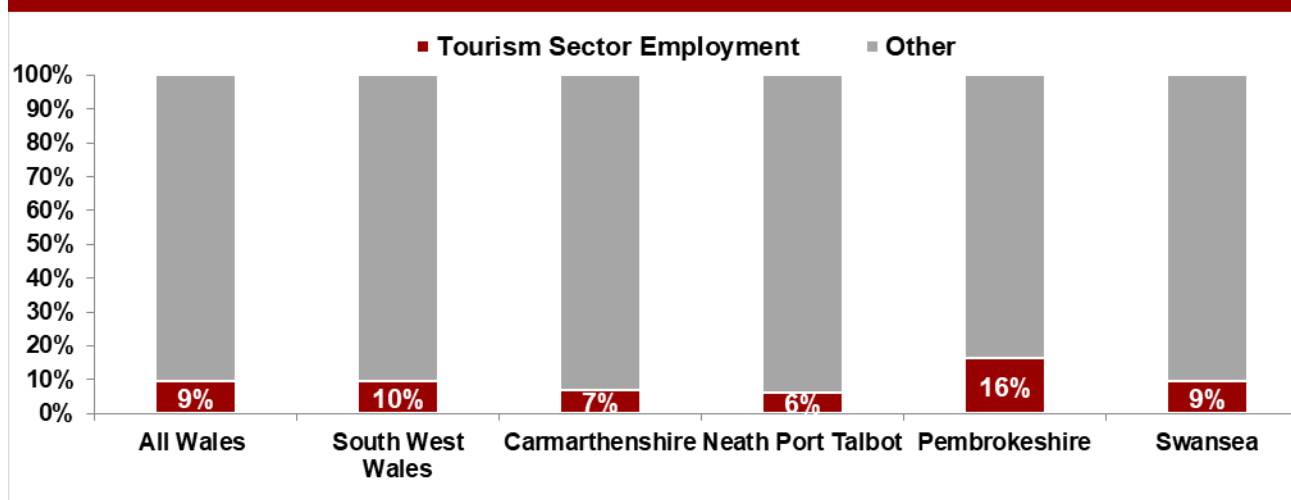


Figure 7.1 Proportion (%) of Tourism Sector Employment compared to all employment in Wales, South West Wales and in each Local Authority in South West Wales - 2018

Source: Welsh Government Economic Stats



In 2018, South West Wales had a slightly larger proportion, 10 per cent, of the workforce employed in the Tourism Sector than all Wales, 9 per cent. The proportion of those employed in the Tourism Sector in Pembrokeshire, at 16 per cent, was even higher than the all Wales and South West Wales average.

8. Appendix

Overnight Domestic GB Visitors

Table 8.1 Volume of Overnight Domestic GB Trips (millions), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Averages

Source: Great Britain Tourism Survey

Trips (millions)											
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
GB	118.959	118.944	117.563	121.628	122.788	125.186	121.055	120.524	119.374	121.519	119.562
Wales	8.937	8.718	8.669	9.084	9.322	9.743	9.845	10.127	9.919	9.593	9.451
North Wales	3.105	3.030	3.184	3.264	3.417	3.488	3.655	3.713	3.626	3.428	3.378
Mid Wales	1.642	1.591	1.577	1.585	1.540	1.618	1.717	1.763	1.750	1.740	1.887
South East Wales	2.254	2.124	1.943	2.027	2.110	2.310	2.231	2.473	2.471	2.463	2.252
South West Wales	1.815	1.882	1.863	2.063	2.074	2.160	2.089	2.081	2.014	1.890	1.862
Nights (millions)											
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
GB	378.860	379.046	372.160	378.725	378.989	383.059	370.464	366.751	362.068	368.704	366.920
Wales	33.238	32.084	32.380	33.429	34.144	34.450	34.484	34.974	34.739	33.385	33.198
North Wales	12.035	11.822	12.346	12.988	13.415	13.354	13.575	13.199	13.222	12.221	12.450
Mid Wales	6.463	6.026	6.204	6.131	6.087	6.244	6.535	6.794	6.819	6.730	6.977
South East Wales	6.202	5.818	5.476	5.241	5.370	5.494	5.291	6.097	6.213	6.350	5.866
South West Wales	7.676	7.558	7.382	7.983	8.066	8.243	8.166	8.153	7.907	7.468	7.321

Spend (£ millions)											
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
GB	£20,165	£20,458	£20,312	£21,145	£22,146	£23,312	£23,320	£23,603	£23,532	£23,862	£23,574
Wales	£1,473	£1,403	£1,413	£1,523	£1,587	£1,673	£1,673	£1,802	£1,800	£1,764	£1,723
North Wales	£492	£495	£508	£544	£545	£582	£591	£639	£639	£613	£626
Mid Wales	£239	£228	£252	£257	£255	£262	£281	£309	£311	£304	£314
South East Wales	£375	£328	£302	£309	£349	£374	£361	£418	£421	£422	£373
South West Wales	£326	£308	£314	£364	£390	£397	£390	£386	£387	£384	£374

International Visitors

Table 8.2 Volume of International Visits (000s), Nights (000s) and Related Expenditure (£ millions) – Annual original v revised

Source: International Passenger Survey

	Visits (000s)										
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Wales - original	991	890	879	854	869	933	970	1,074	1,079	941	
Wales - revised	986	878	877	848	877	935	958	1,080	1,112	988	1,023

	Nights (000s)										
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Wales - original	6,288	6,245	6,302	7,112	5,866	6,662	7,355	7,166	6,894	6,522	
Wales - revised	15,013	13,233	13,838	15,229	12,540	15,794	15,859	15,791	14,450	13,906	13,731

	Spend (£ millions)										
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Wales - original	£332	£333	£328	£346	£352	£368	£410	£444	£369	£405	
Wales - revised	£337	£336	£335	£352	£353	£373	£409	£507	£397	£433	£515

Table 8.3 Volume of International Visits (000s), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Averages

Source: International Passenger Survey

Visits (000s)											
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
UK	32,460	31,913	31,120	31,119	31,502	32,558	33,708	35,232	37,086	39,000	40,164
Wales	1,063	1,013	977	914	868	867	887	923	991	1,050	1,060
North Wales	298	304	289	270	247	233	229	250	270	298	303
Mid Wales	89	82	87	78	80	77	80	85	98	107	107
South East Wales	511	471	457	433	430	439	446	470	499	526	525
South West Wales	214	202	201	190	173	173	190	190	203	203	198
Nights (millions)											
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
UK	256.904	246.105	241.013	241.637	242.072	248.761	258.797	272.662	287.121	298.760	301.229
Wales	7.737	6.889	6.833	6.373	6.696	6.608	6.713	6.671	7.173	7.437	7.281
North Wales	1.792	1.576	1.495	1.545	1.712	1.700	1.647	1.555	1.686	1.633	1.668
Mid Wales	0.637	0.630	0.640	0.509	0.513	0.498	0.565	0.619	0.740	1.045	1.001
South East Wales	3.631	3.069	3.085	2.869	3.228	3.119	3.134	3.058	3.228	3.229	3.102
South West Wales	1.570	1.552	1.544	1.379	1.186	1.242	1.318	1.369	1.447	1.421	1.392
Spend (£ millions)											
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
UK	£15,981	£16,517	£17,129	£18,009	£18,722	£20,185	£21,665	£23,019	£24,091	£25,749	£26,631
Wales	£338	£330	£329	£336	£341	£347	£359	£378	£430	£438	£446
North Wales	£77	£82	£79	£80	£81	£77	£76	£80	£88	£92	£90
Mid Wales	£27	£24	£28	£27	£33	£34	£36	£39	£58	£62	£54
South East Wales	£166	£156	£157	£165	£169	£170	£170	£178	£186	£192	£196
South West Wales	£62	£62	£62	£61	£56	£62	£75	£76	£91	£84	£95

Tourism Day Visitors

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

Source: Great Britain Day Visits Survey

Visits (millions)						
	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
GB	1,857	1,872	1,801	1,803	1,794	1,777
Wales	112	108	97	97	96	99
North Wales	27	27	24	27	24	25
Mid Wales	13	15	15	13	11	11
South East Wales	47	44	39	37	38	39
South West Wales	24	23	20	21	22	24
Spend (£ millions)						
	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
GB	62,498	63,161	61,938	62,560	62,765	63,378
Wales	3,770	3,669	3,240	3,432	3,850	4,146
North Wales	831	1,011	817	1,001	830	920
Mid Wales	427	427	449	357	374	388
South East Wales	1,789	1,685	1,442	1,534	1,612	1,735
South West Wales	759	771	733	695	750	813

Accommodation Occupancy Rates

Table 8.5 Accommodation Occupancy Rates in Wales and in each Welsh Region - Three Year Annual Averages

Source: Visit Wales Occupancy Survey

Hotel - Room Rates									
	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
Wales	58	59	59	60	62	65	66	67	66
North Wales	60	61	61	62	64	65	67	67	65
Mid Wales	49	51	52	53	53	52	52	52	53
South East Wales	63	62	61	62	65	69	71	72	73
South West Wales	54	53	52	50	55	59	63	63	63
Guesthouse/B&B - Room Rates									
	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
Wales	37	36	35	34	34	35	36	38	37
North Wales	38	38	35	34	34	35	37	38	38
Mid Wales	31	33	33	33	30	30	29	29	29
South East Wales	40	34	31	27	29	31	34	32	24
South West Wales	40	38	39	40	41	42	43	46	46

Self Catering - Unit Rates									
	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
Wales	48	50	51	52	51	50	51	53	55
North Wales	53	57	56	56	57	57	57	57	59
Mid Wales	44	45	47	49	45	45	47	51	51
South East Wales*	-	-	-	-	-	-	48	49	48
South West Wales*	-	-	-	-	-	-	48	52	54
Static Caravan and Holiday Homes - Unit Rates (May-October only)									
	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
Wales	81	81	80	83	77	74	76	84	88
North Wales	-	-	-	-	69	57	48	42	44
Mid Wales	-	-	-	-	57	58	47	57	57
South East Wales**	-	-	-	-	-	-	-	-	-
South West Wales	-	-	-	-	52	56	71	75	79

*South East Wales and South West Wales figures not available until 2014

**South East Wales figures not shown due to small sample sizes

Touring Caravan and Camping - Pitch Rates (May-October only)									
	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
Wales	44	45	43	37	32	33	36	39	42
North Wales	-	-	-	-	33	35	39	41	42
Mid Wales	-	-	-	-	35	35	34	35	38
South East Wales*	-	-	-	-	-	-	-	-	-
South West Wales	-	-	-	-	32	33	36	38	43
Hostel - Bedspace Rates									
	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016	2015-2017	2016-2018
Wales	38	41	41	42	44	46	48	51	52
North Wales	38	43	46	49	50	52	54	54	53
Mid Wales	39	38	39	40	42	46	50	53	55
South East Wales	45	43	41	41	41	41	44	45	48
South West Wales	37	39	39	39	39	41	44	49	51

**South East Wales figures not shown due to small sample sizes*

Bedstock

Table 8.6 Volume of Accommodation Bedstock Establishments and Bedspaces in Wales and in each Welsh Region – 2013

Source: Visit Wales Bedstock Survey

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

Table 8.7 Volume of Tourism Sector Employment (thousands) in Wales and in each Welsh Region

Source: Welsh Government Economic Stats

Tourism Sector Employment (thousands)													
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Wales	98.7	105.7	102.8	111	114.4	117.7	119.2	123	123.1	131.6	131.2	127.3	132.3
North Wales	23.5	24.1	27.3	25.2	30.1	28.5	29.7	30.7	27.5	32.2	31.2	32.1	29.6
Mid Wales	8	8.8	7.5	8.4	9.2	7.2	9.7	8.5	9.5	12.1	10.8	10.3	10.4
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	55.3	63.9
South West Wales	21.4	24.1	22.7	24.5	24.7	24.9	27.1	28.2	27	29	30.1	29.6	28.4

Type of Accommodation used on an Overnight Domestic GB Trip

**Table 8.8 Accommodation
Categories – Overnight
Domestic GB Trips**

Source: Great Britain Tourism Survey

Hotel/Motel

Hotel

Motel

Guest house/Farmhouse/B&B

Bed & Breakfast

Guest house

Farmhouse

Self catering

Self-catering in rented flat\apartment

Self-catering in rented
house\chalet\villa\bungalow\cottage

Holiday camp\villaage - self catering

Friend's home/Relative's home/Second home/Timeshare

Friend's home

Relative's home

Own second home\timeshare

Caravan and Camping

Caravan and Camping

Type of Accommodation used on an International Visit

Table 8.9 Accommodation Categories – International visitors

Source: International Passenger Survey

Commercial Serviced

Hotel/guest house

Bed & Breakfast

Guest with relatives or friends

Free guest with relatives or friends

Paying guest family or friends house

Camping/Caravan

Camping/Caravan

Rented House/Flat

Rented House/Flat

Hostel/university/school

Hostel/university/school

Other

Holiday Village

Own home

Other