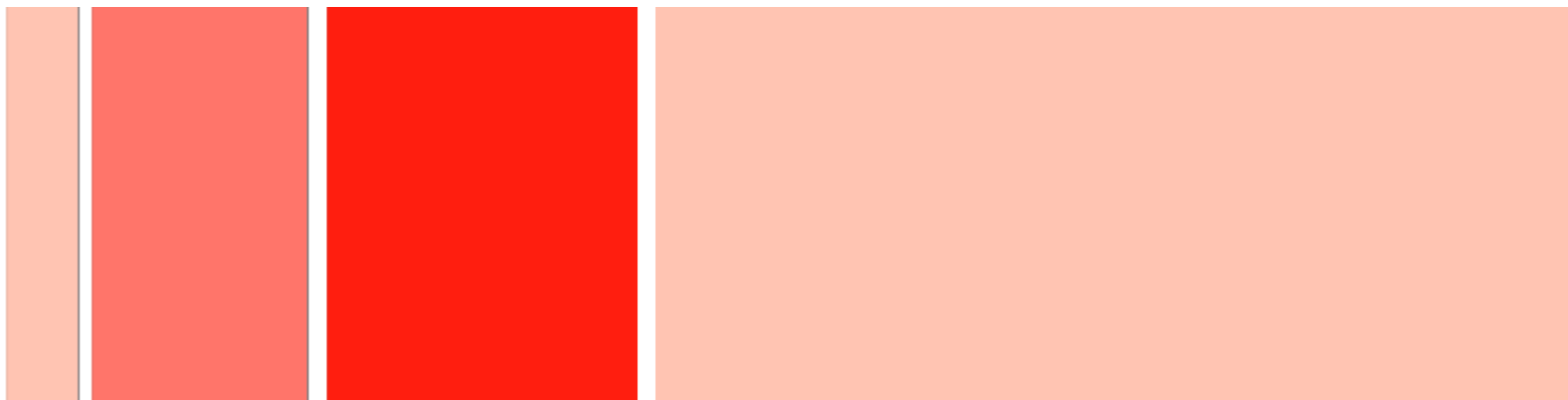


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# Tourism Profile – North Wales 2016 - 2018



Title: Tourism Profile – North Wales 2016 - 2018

Subtitle: Summary of tourism trends for the North Wales region

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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 North 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.

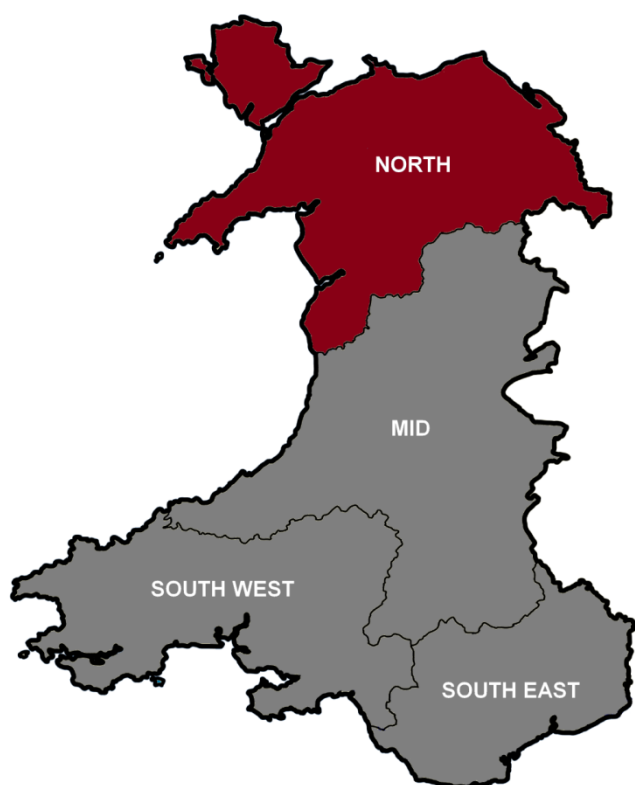
The profiles contain tables on domestic overnight, international overnight and domestic day visitors to Wales, occupancy rates, bedstock supply information as well as employment statistics covering the tourism sector.

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## 1. Overview and Key Points



During 2016-2018, North Wales accounted for 36 per cent of all overnight domestic GB trips, 30 per cent of international visits and 25 per cent of Tourism Day visits to Wales.

### All tourism

The annual average associated spending on all tourism types (overnight domestic GB trips, international visits and Tourism Day visits) to North Wales between 2015-2017 and 2016-2018 increased by 7 per cent to £1.636 billion. In comparison, tourism related expenditure in Wales increased by 4 per cent to £6.315 billion. Please refer to [Table 1.0](#)

### Overnight Domestic GB Visitors

The annual average of overnight domestic GB trips to North Wales between 2015-2017 and 2016-2018 decreased by 1 per cent to 3.378 million, whereas related expenditure increased by 2% to £626 million. A similar trend was

seen in all Wales over the same period, with a decrease of 1 per cent in the volume of trips to 9.451 million, while related expenditure decreased by 2 per cent to £1,723 million. Please refer to [Table 1.1](#)

### International Visitors

Between 2015-2017 and 2016-2018, the annual average volume of international visits to North Wales increased by 2 per cent to 303,000 visits. However, related expenditure decreased by 2 per cent to £90 million. For 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 to North Wales increased by 3 per cent to 25 million, whereas related expenditure increased by 11 per cent to £920 million. In Wales, over the same period, the average annual volume of Tourism Day Visits increased by 3 per cent to 99 million, whilst related expenditure increased by 8 per cent to £4,146 million. Please refer to [Table 1.3](#)

Overall expenditure by tourists to North Wales increased between 2015-2017 and 2016-2018 at a higher rate than any other region in Wales.

**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%
<b>North Wales</b>	<b>£1,535</b>	<b>£1,636</b>	<b>7%</b>
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 North Wales in 2016-2018 had increased by 7 per cent compared with the previous period, the largest increase of all Wales regions.

Domestic overnight trips and expenditure to North Wales only experienced a small change 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%
<b>North Wales</b>	<b>3.428</b>	<b>3.378</b>	<b>-1%</b>
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%
<b>North Wales</b>	<b>£613</b>	<b>£626</b>	<b>2%</b>
Mid Wales	£304	£314	3%
South East Wales	£422	£373	-11%
South West Wales	£384	£374	-3%

Domestic overnight trips fell by 1 per cent in North Wales between 2015-2017 and 2016-2018, in line with Wales overall. However a 2 per cent increase in spending was seen over the same period in North Wales, compared to a 2 per cent decrease in spending in Wales overall.

**International visits and expenditure to North Wales only experienced a small change between 2015-2017 and 2016-2018.**

**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%
<b>North Wales</b>	<b>0.298</b>	<b>0.303</b>	<b>2%</b>
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%
<b>North Wales</b>	<b>£92</b>	<b>£90</b>	<b>-2%</b>
Mid Wales	£62	£54	-13%
South East Wales	£192	£196	2%
South West Wales	£84	£95	13%

The volume of international visits to North Wales increased by 2 per cent between 2015-2017 and 2016-2018, above the Wales average increase of 1 per cent. However, associated expenditure on international visits to North Wales decreased by 2 per cent over the same period, whereas overall in Wales expenditure increased by 2 per cent.



Tourism day visit expenditure to North Wales between 2015-2017 and 2016-2018 increased more than any other region in Wales.

**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%
<b>North Wales</b>	<b>24</b>	<b>25</b>	<b>3%</b>
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%
<b>North Wales</b>	<b>£830</b>	<b>£920</b>	<b>11%</b>
Mid Wales	£374	£388	4%
South East Wales	£1,612	£1,735	8%
South West Wales	£750	£813	8%

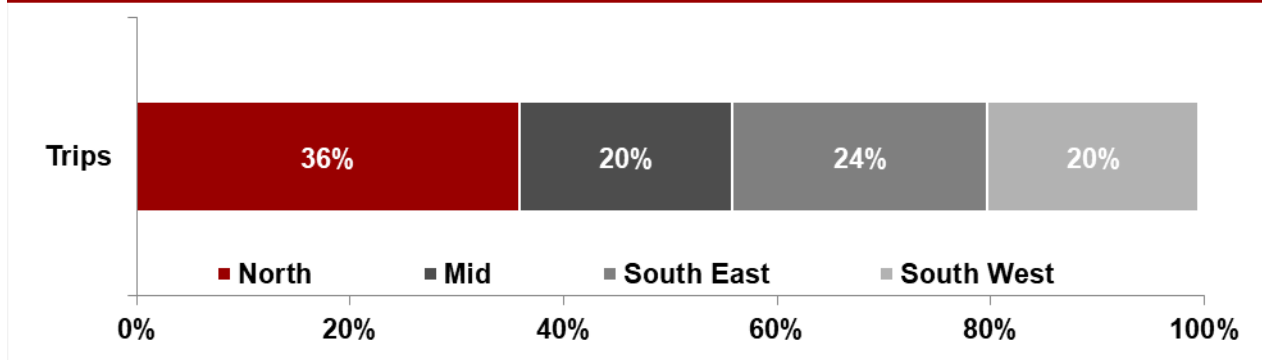
Tourism Day visit volumes in North Wales increased by 3 per cent between 2015-2017 and 2016-2018, in line with the increase seen in Wales on average, and lower than the 9 per cent increase seen in South West Wales. However, related expenditure increased over the same period in North Wales by 11 per cent, the largest increased of all regions.

## 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. Full data in Appendix [Table 8.1](#).

**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

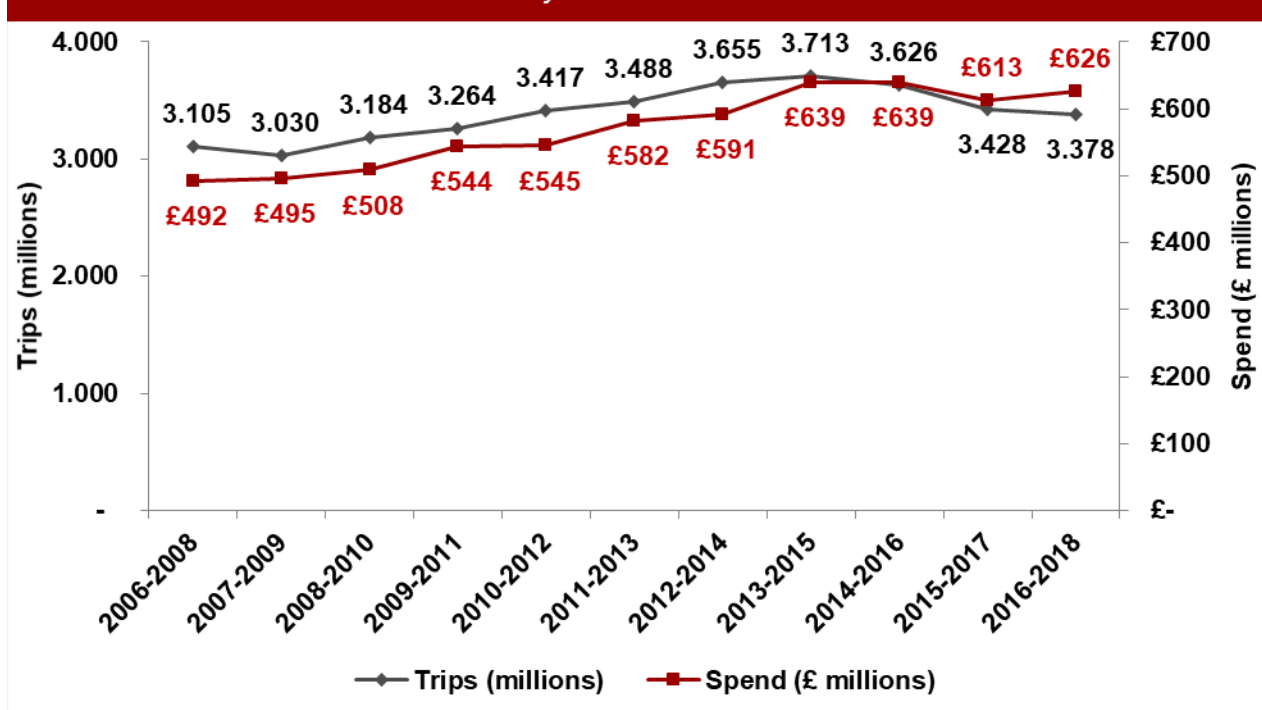


Over the period of 2016-2018, North Wales received an annual average of 3,378,000 overnight domestic GB trips per year. During this period these visitors generated an annual average associate spend of £626 million. North Wales received 36 per cent of all overnight domestic GB trips to Wales, making it the most popular Welsh region for this kind of tourism.

### Volume of Trips and Related Expenditure

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

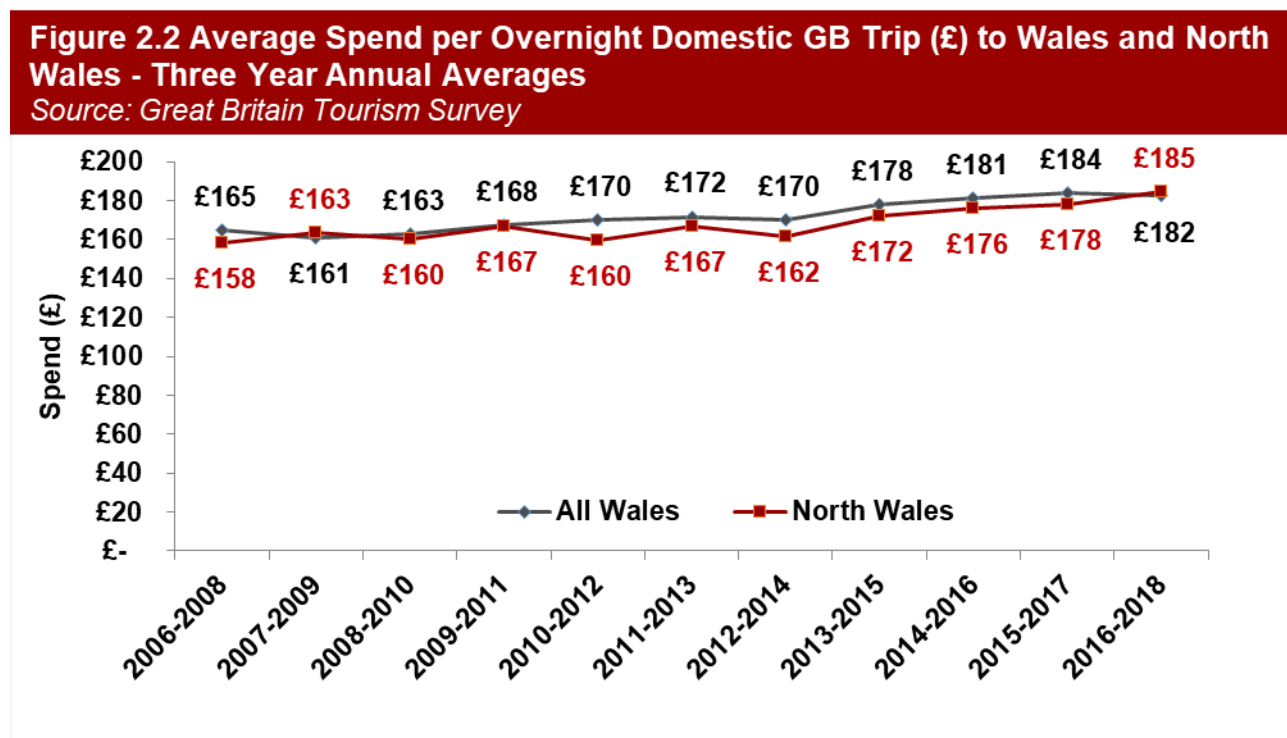
Source: Great Britain Tourism Survey



Between the peak of 2013-2015 and 2015-2017 there was a decrease in the annual average volume of overnight domestic GB trips and related expenditure to North Wales from £639 million to £613 million. However, related expenditure between 2015-2017 and 2016-2018 in North Wales

recovered partially, reaching £626 million. Over the same period, the annual average volume of overnight domestic GB trips decreased slightly from 3.428 million to 3.378 million in 2016-2018.

### Average Spend per Trip

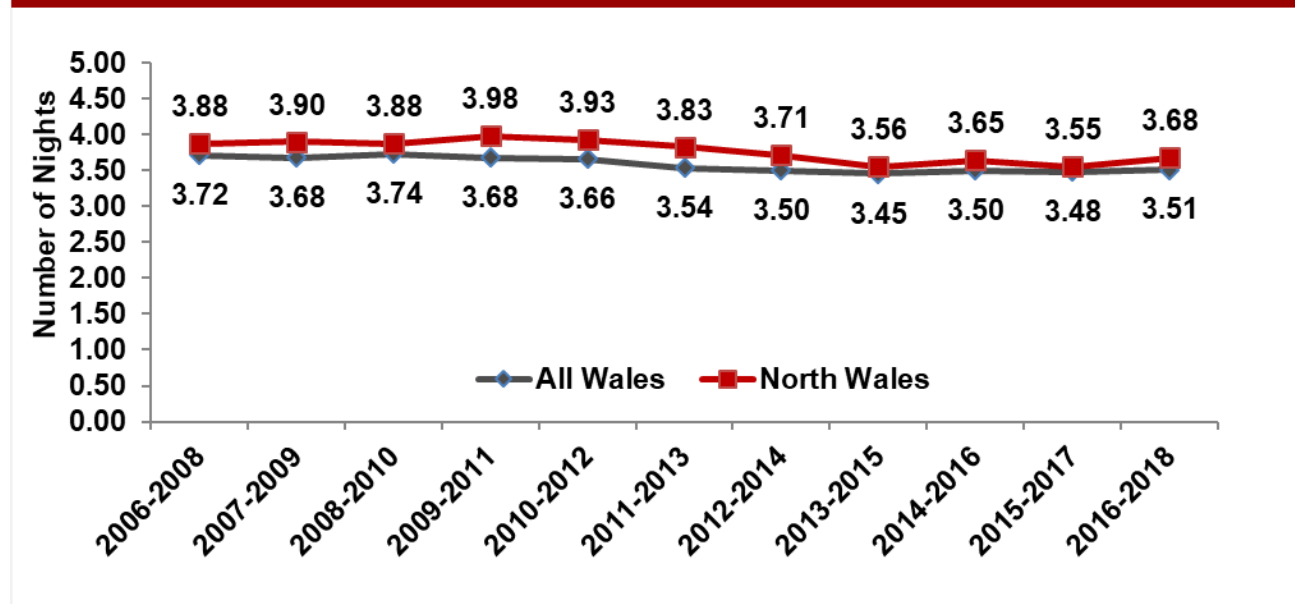


The average spend per overnight domestic GB trip to North Wales in 2016-2018 was £185, the highest it had been since 2006-2008. For comparison, during the same period, the all Wales average was £182. It was the first time since 2007-2009 that the North Wales average had been above the all Wales average.

## Average Number of Nights per Trip

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

Source: Great Britain Tourism Survey



The average number of nights per overnight domestic GB trips in North Wales decreased over the years between 2009-2011 and 2013-2015. Nonetheless, in 2016-2018 it was 3.68 nights, just above the all Wales average for 2016-2018 of 3.51 nights.

## Purpose of Trip

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

Source: Great Britain Tourism Survey

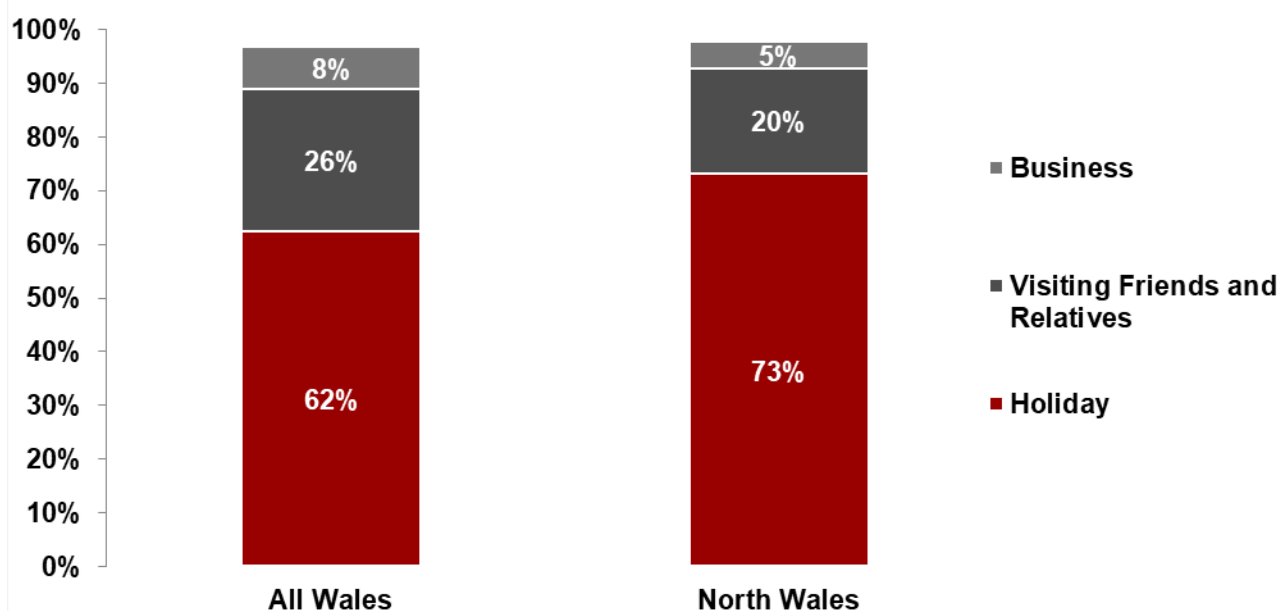
	All Wales	North Wales
<b>Total Trips</b>	<b>9.451</b>	<b>3.378</b>
Holiday	5.904	2.469
Visiting Friends and Relatives	2.492	0.667
Business	0.746	0.165

Almost three quarters of all overnight domestic GB trips (73 per cent) in North Wales were for a holiday, the highest proportion of all four regions. This may be unsurprising as North Wales received an above average proportion of its overnight visitors during July - September (see [Figure 2.7](#)).

Furthermore, North Wales received the smallest proportion of business visitors (5 per cent) of all the Welsh regions in 2016-2018, with the overall Wales average at 8 per cent over the same period.

**Figure 2.4 Proportion (%) of Trips to All Wales and North Wales by Purpose of Trip – Annual Average 2016-2018**

Source: Great Britain Tourism Survey

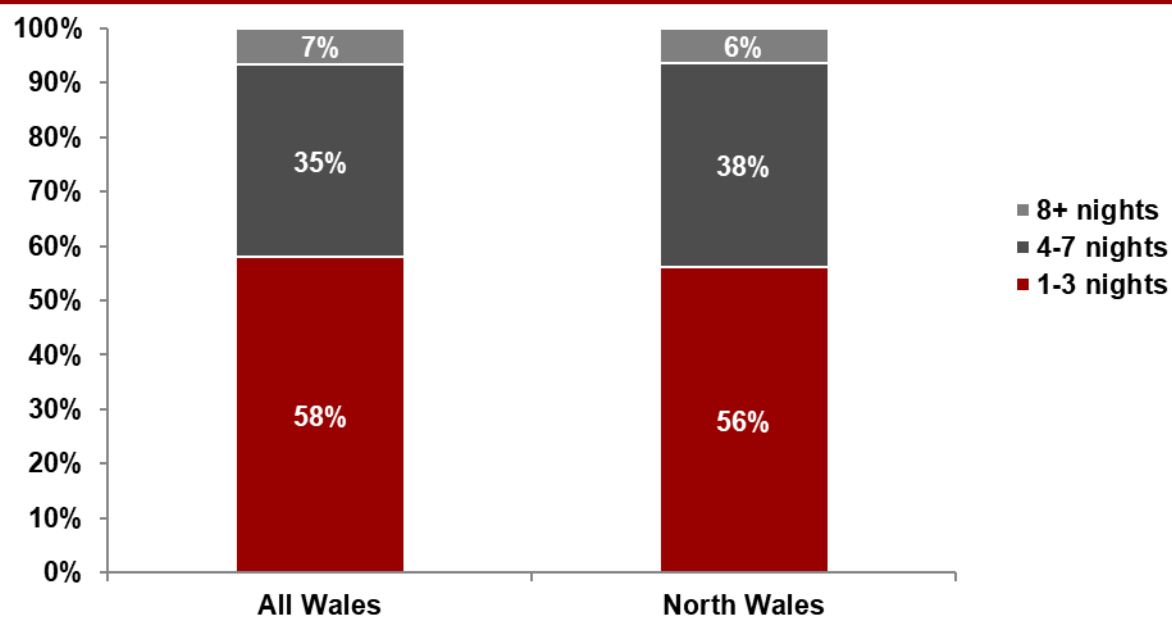


\*Please note that the figures might not add to 100 per cent due to survey participants not answering this question or selecting 'Don't Know'/'Other'.

## Duration of Holiday Trips

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

Source: Great Britain Tourism Survey



For holiday visits to North Wales in 2016-18, over half were 1-3 nights (56 per cent). This was comparable to the overall trend in Wales (58 per cent) for the same period. The distribution of trip duration has been relatively consistent over the past few years.

## Lifestage of Holiday Trips

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

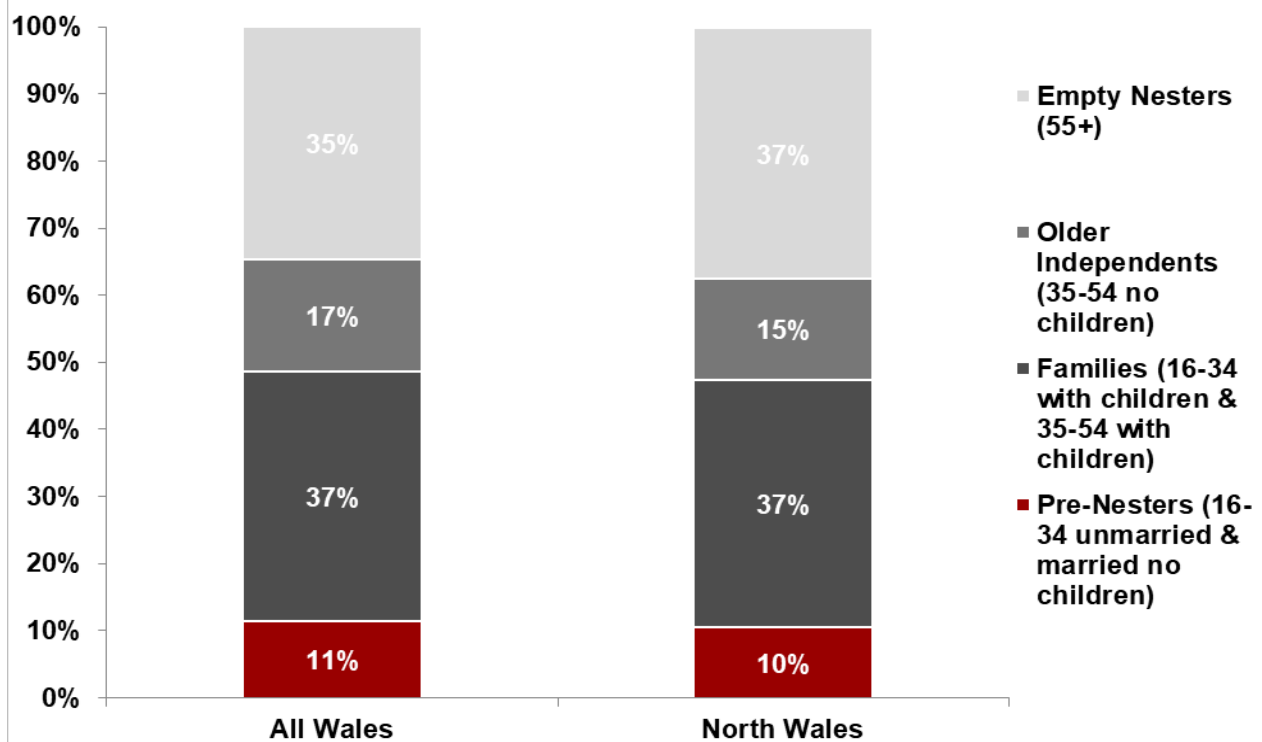
*Source: Great Britain Tourism Survey*

	All Wales	North Wales
<b>Total Holiday Trips</b>	<b>5.904</b>	<b>2.469</b>
Pre-Nesters (16-34 unmarried & married no children)	0.672	0.259
Families (16-34 with children & 35-54 with children)	2.198	0.915
Older Independents (35-54 no children)	0.991	0.370
Empty Nesters (55+)	2.041	0.924

The lifestage accounting for the largest proportion of overnight domestic GB holiday trips taken in North Wales during 2016-2018 was empty nesters (37 per cent), though this was followed closely by the Family lifestage, also accounting for 37 per cent of holiday trips. The distribution of different lifestages among holiday visitors in North Wales is very similar to the distribution seen in Wales overall. North Wales received slightly fewer Older Independents than Wales on average (15 per cent compared with 17 per cent), and slightly fewer Pre-Nesters (10 per cent compared with 11 per cent for Wales overall). The proportions of different lifestage visitors coming to North Wales have been relatively stable over recent years.

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

*Source: Great Britain Tourism Survey*



## Seasonality of Trips

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

Source: Great Britain Tourism Survey

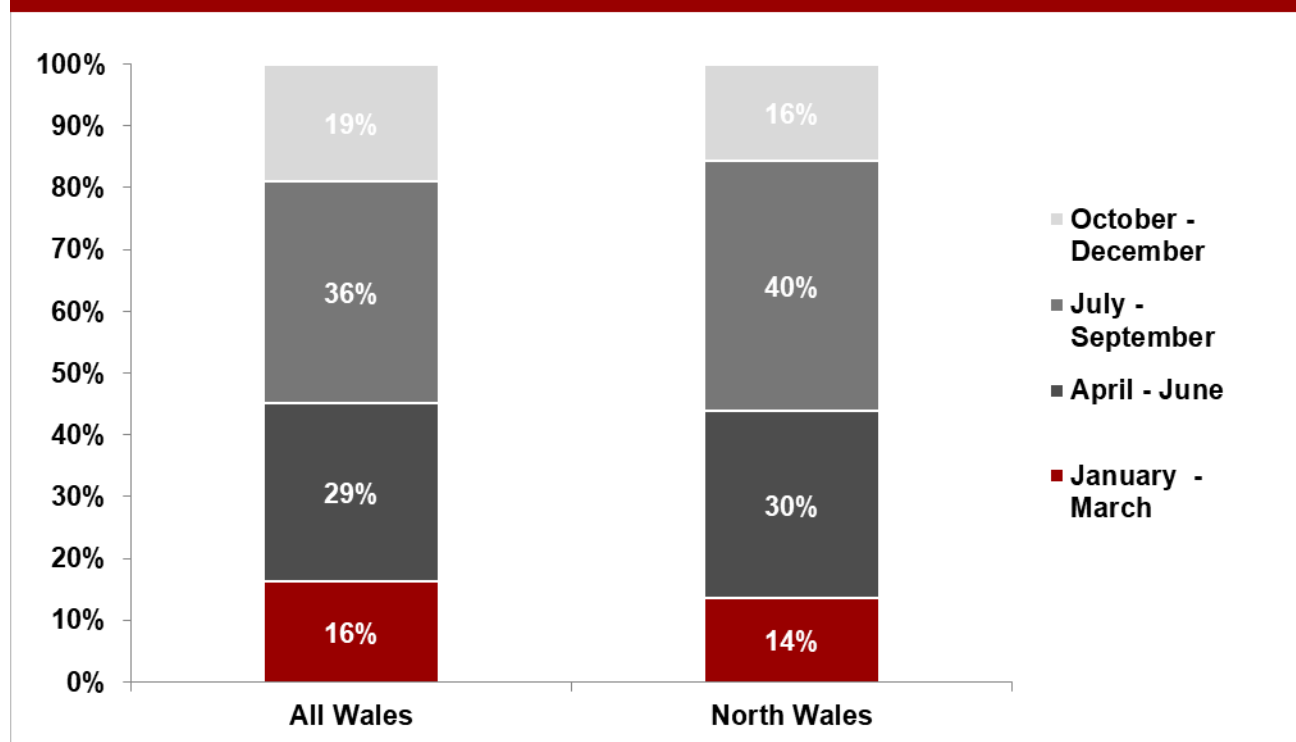


Figure 2.7 for North Wales and all Wales during 2016-2018 reflects typical high and low season periods. Overnight domestic GB trips to North Wales tended to happen during the summer months between July-September (40 per cent) and April-June (30 per cent), with Easter usually falling during the month of April.

Over the same period, when compared to Wales overall, North Wales had a slightly lower proportion of visitors arriving between January and March (16 per cent and 14 per cent respectively), but a higher proportion of visitors arriving between July and September (36 per cent and 40 per cent respectively).

## Type of Place Visited

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

Source: Great Britain Tourism Survey

	All Wales	North Wales
<b>Total Trips</b>	<b>9.451</b>	<b>3.378</b>
Seaside	4.015	1.805
Large city / large town	1.738	0.232
Small town	1.789	0.609
Countryside / village	2.208	0.851

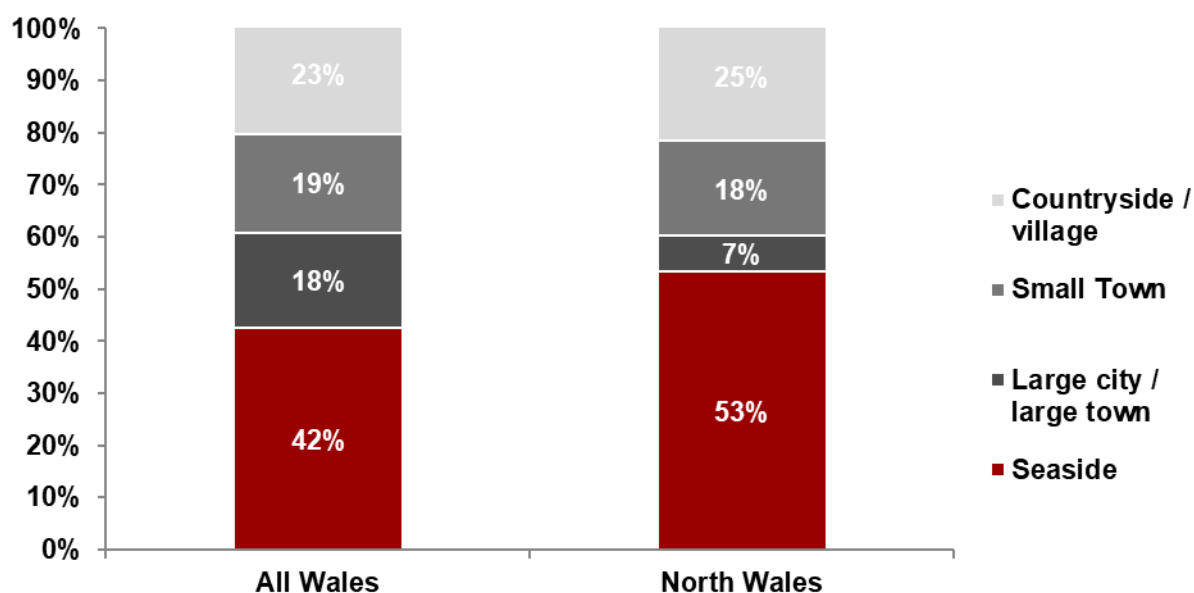


In 2016-2018, the most popular destination for overnight domestic GB trips to North Wales was the seaside (53 per cent). The least popular place to visit was a large city or town (7 per cent). A similar pattern can be seen for the whole of Wales, with 42 per cent visiting the seaside and only 18 per cent a large city/town, but in North Wales more trips were to a seaside destination and fewer were to a large city or town than in Wales on average. Similar proportions of overnight visitors went to countryside / village places and small towns in North Wales and Wales overall.

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 North Wales – Annual Average 2016-2018**

*Source: Great Britain Tourism Survey*



*\*Please note that the figures might add up to over 100% 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 more than 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 North Wales – Annual Average 2016-2018**

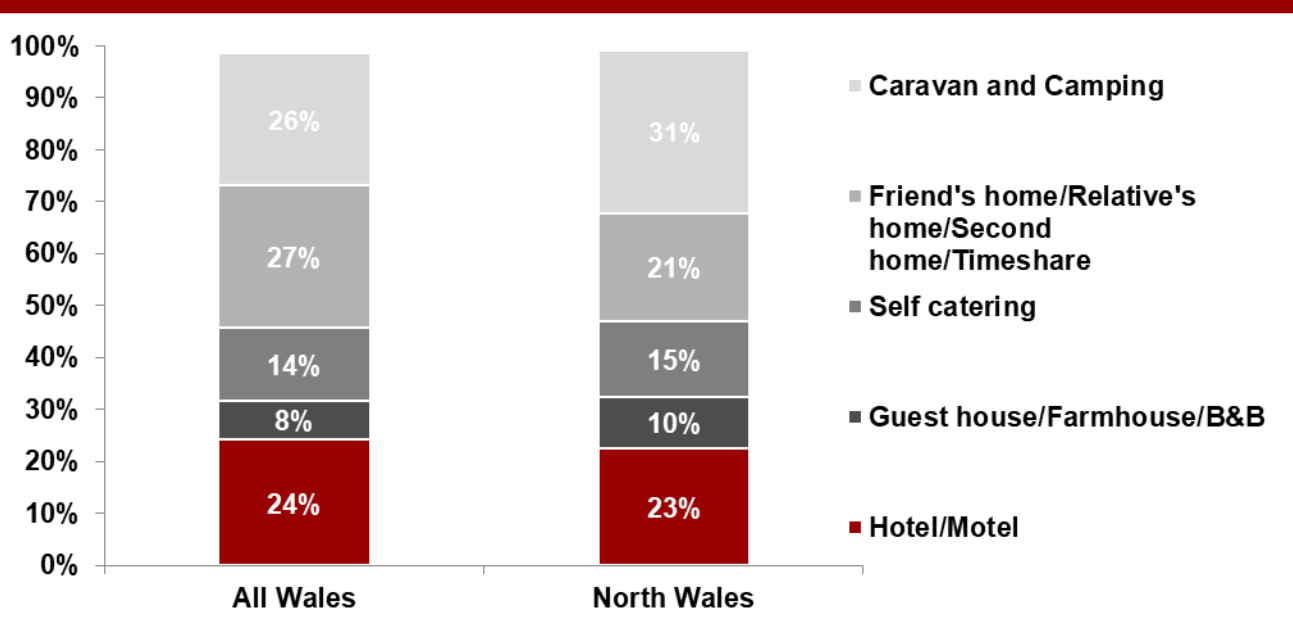
*Source: Great Britain Tourism Survey*

	All Wales	North Wales
<b>Total Trips</b>	<b>9.451</b>	<b>3.378</b>
Hotel/Motel	2.286	0.762
Guest house/Farmhouse/B&B	0.716	0.332
Self-catering	1.314	0.491
Friend's home/Relative's home/Second home/Timeshare	2.587	0.703
Caravan and Camping	2.414	1.060

In 2016-2018, the most popular type of accommodation used on an overnight domestic GB trip to North Wales was 'Caravan and Camping' with 1.060 million trips (31 per cent of all trips). 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' (27 per cent, 2.587 million trips).

**Figure 2.9 Proportion (%) of Overnight Domestic GB Trips to All Wales and North 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 North Wales – Annual Average 2016-2018**

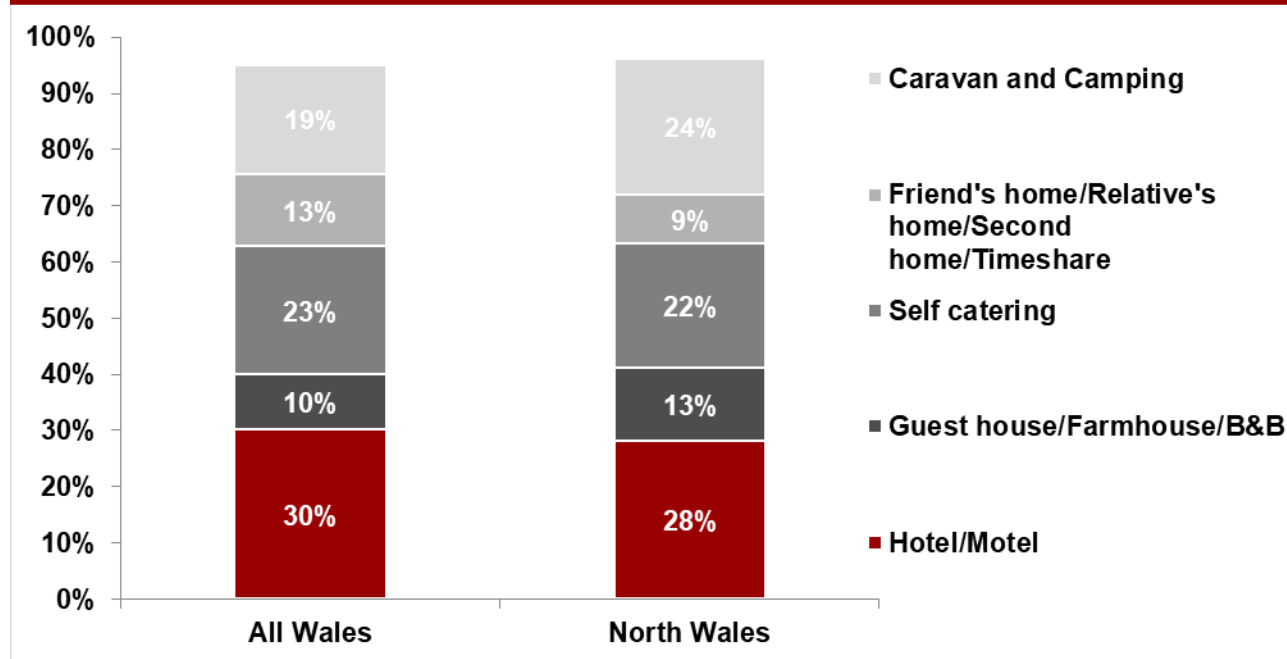
	All Wales	North Wales
<b>Total Spend</b>	<b>£1,723</b>	<b>£626</b>
Hotel/Motel	£521	£176
Guest house/Farmhouse/B&B	£168	£81
Self-catering	£392	£139
Friend's home/Relative's home/Second home/Timeshare	£222	£55
Caravan and Camping	£336	£151

As seen in Figure 2.10, although 'Friend's home/Relative's home/Second home/Timeshare' included a considerable share of volume of trips, 21 per cent for North Wales and 27 per cent for all Wales, it contributed to a much smaller proportion of related expenditure, with 9 per cent in North Wales and 13 per cent in all Wales.

In both North Wales and all Wales, 'Hotel/Motel' contributed to a higher proportion of related expenditure than volume of trips. In North Wales, 'Hotel/Motel' stays were responsible for 23 per cent of trips (762,000) but contributed to 28 per cent (£176 million) of all expenditure. Similarly, trips involving self-catering accommodation accounted for 15 per cent in volume of trips, but 22 per cent of related expenditure.

**Figure 2.10 Proportion (%) of Related Expenditure of Overnight Domestic GB Trips to All Wales and North 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 North Wales – Annual Average 2016-2018**

*Source: Great Britain Tourism Survey*

	All Wales	North Wales
<b>Total Trips</b>	<b>9.451</b>	<b>3.378</b>
Scotland	0.120	0.058
Wales	1.631	0.396
England	7.701	2.925
North East England	0.101	0.035
North West England	1.789	1.300
Yorkshire and the Humber	0.390	0.158
East Midlands	0.567	0.204
West Midlands	1.830	0.675
East of England	0.340	0.075
London	0.637	0.162
South East England	1.018	0.186
South West England	1.028	0.130

Out of all the regions in Wales, North Wales had the highest proportion of overnight domestic GB trips from England (87 per cent) in 2016-2018. Moreover, over the same period, it had the smallest proportion of overnight Welsh visitors (12 per cent).

Nearly two fifths (38 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, closely followed by the West Midlands, each accounting for 19 per cent of visitors to Wales.

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

*Source: Great Britain Tourism Survey*

	All Wales	North Wales
<b>Total Trips</b>	<b>100%</b>	<b>100%</b>
Scotland	1%	2%
Wales	17%	12%
England	81%	87%
North East England	1%	1%
North West England	19%	38%
Yorkshire and the Humber	4%	5%
East Midlands	6%	6%
West Midlands	19%	20%
East of England	4%	2%
London	7%	5%
South East England	11%	6%
South West England	11%	4%

### 3. International Visitors

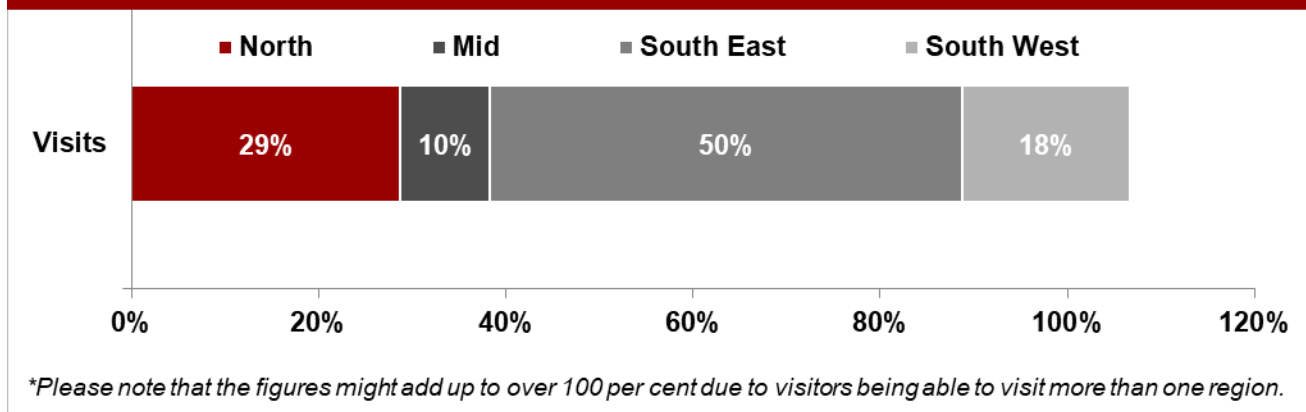
All the data used for this section has been sourced from the [International Passenger Survey](#). Figures shown are the averages taken over a period of three years, 2016-2018, unless stated otherwise.

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

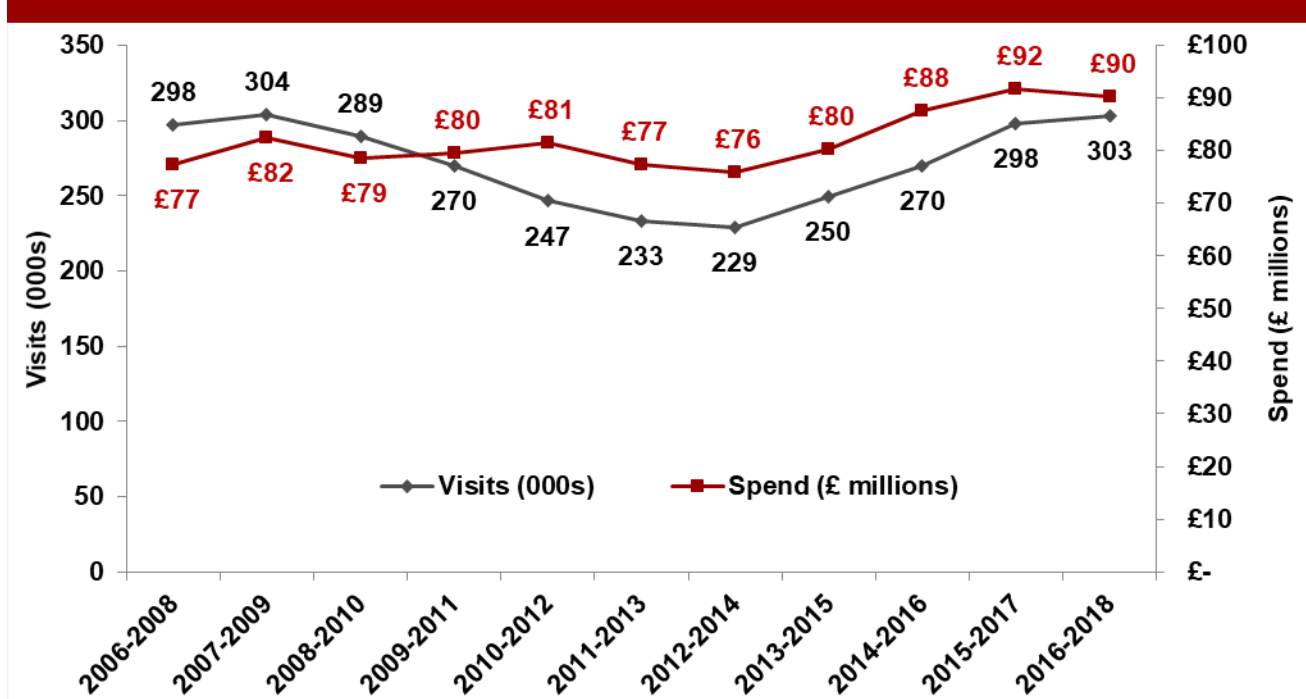


Over the period of 2016-2018, North Wales received an annual average of 303,000 international visits per year. Over this same period, these visits contributed an average of £90 million per year to the Welsh economy. North Wales received 29 per cent of all international visits to Wales.

## Volume of Visits and Related Expenditure

**Figure 3.1 Volume of International Visits (thousands) and Related Expenditure (£ millions) to North Wales – Three Year Annual Averages**

Source: International Passenger Survey

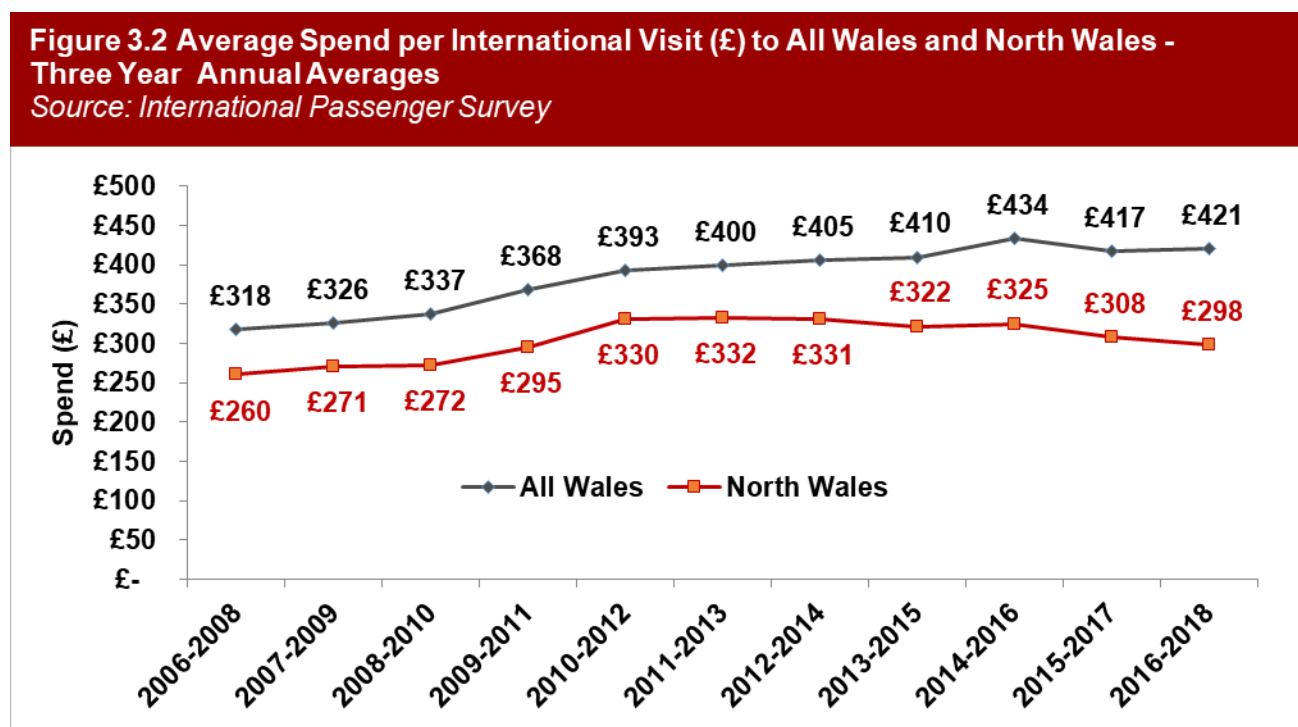


From a peak of 304,000 visits in 2007-2009, the volume of international visits to North Wales decreased steadily, reaching a low of 229,000 visits in 2012-2014. Following this, there has been a continuous increase, with visit volume reaching 303,000 in 2016-2018 – slightly below the previous

peak.

Annual average related expenditure followed a steadier growth, increasing from £77 million in 2006-2008 to reach £92 million in 2015-2017, before falling slightly to £90 million in 2016-2018.

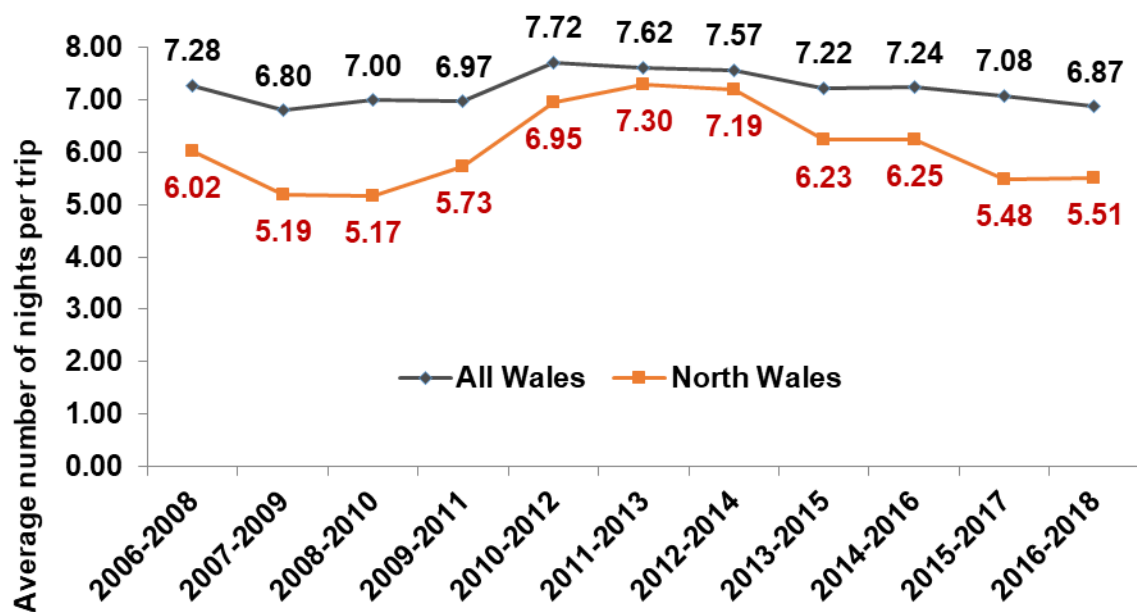
### Average Spend per Visit



Following an increase between 2006-2008 and 2010-2012 from £260 to £330, the average spend per international visit to North Wales plateaued until 2012-2014 when it started to decline, falling to £298 in 2016-2018. In addition, North Wales has consistently seen average spend per visit levels below the all Wales average. The average spend per international visit to Wales has also fallen in recent years after steadily climbing to a high of £434 in 2014-2016, though it increased slightly to £421 in 2016-2018. The average trip duration in North Wales has been consistently below the all Wales average over the past few years.

## Average Number of Nights per Visit

**Figure 3.3 Average Number of Nights per International Visit to Wales and North Wales – Three Year Annual Averages**  
Source: International Passenger Survey



The average number of nights per international visit to North Wales peaked at 7.30 nights in 2011-2013, after which it has followed a downward trend. In 2016-2018 it was at an average of 5.51 nights per international visit to North Wales, below the all Wales average of 6.87 during the same period.

## Purpose of Trip

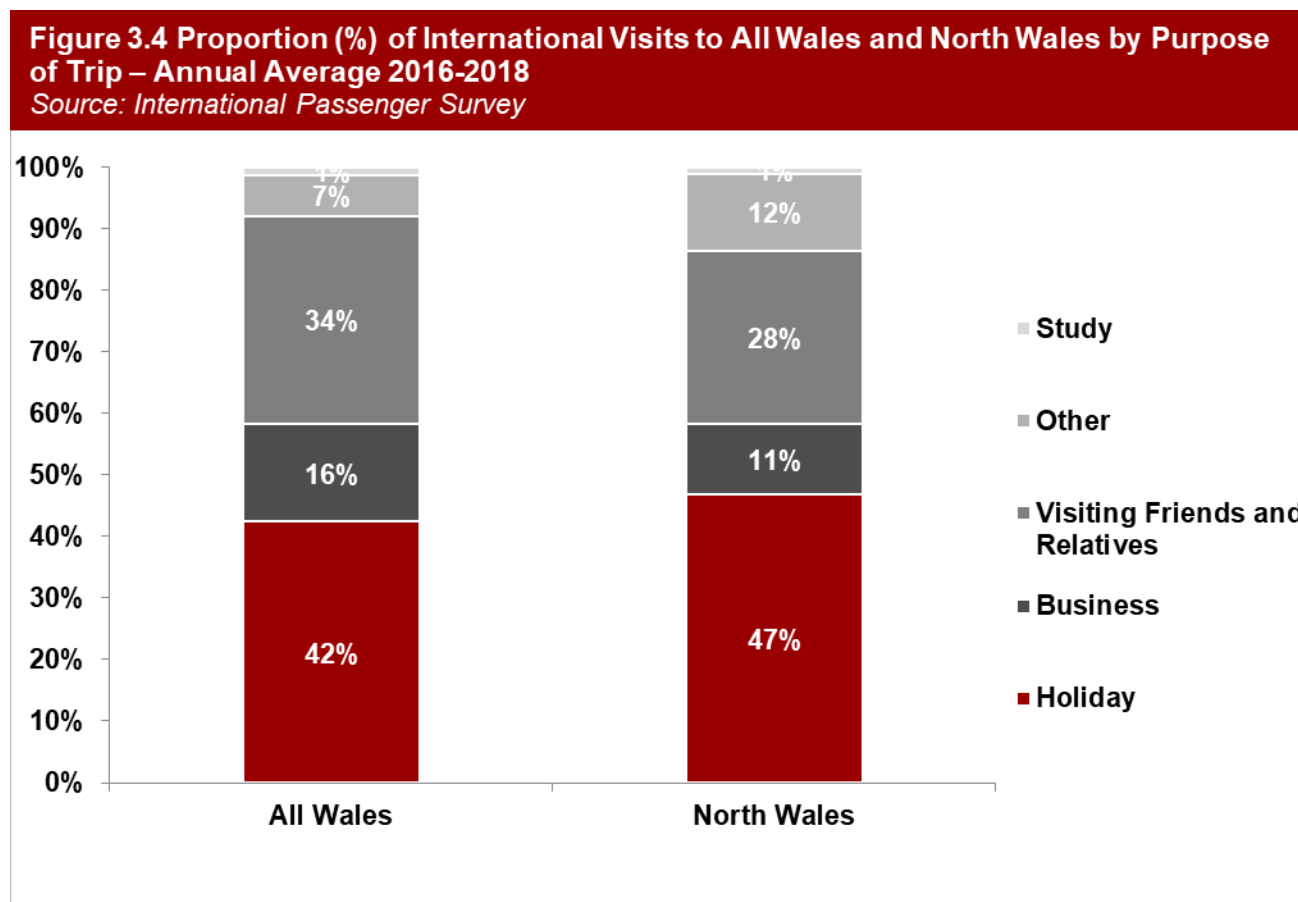
**Table 3.1 Volume of International Visits (000s) by Purpose of Trip to All Wales and North Wales – Annual Average 2016-2018**  
Source: International Passenger Survey

	All Wales	North Wales
<b>Total Trips</b>	<b>1,060</b>	<b>303</b>
Holiday	449	142
Business	168	34
Visiting Friends and Relatives	358	85
Other	70	37
Study	14	4

In 2016-2018, almost half (47 per cent) of all international visitors to North Wales came for a holiday, a higher proportion than for Wales overall (42 per cent). Moreover, less than a third (28 per cent) of international visitors came to visit friends and family – a smaller average to that of all Wales (34 per cent). In addition, North Wales had a smaller proportion of business visitors (11 per cent)



than all Wales (16 per cent).



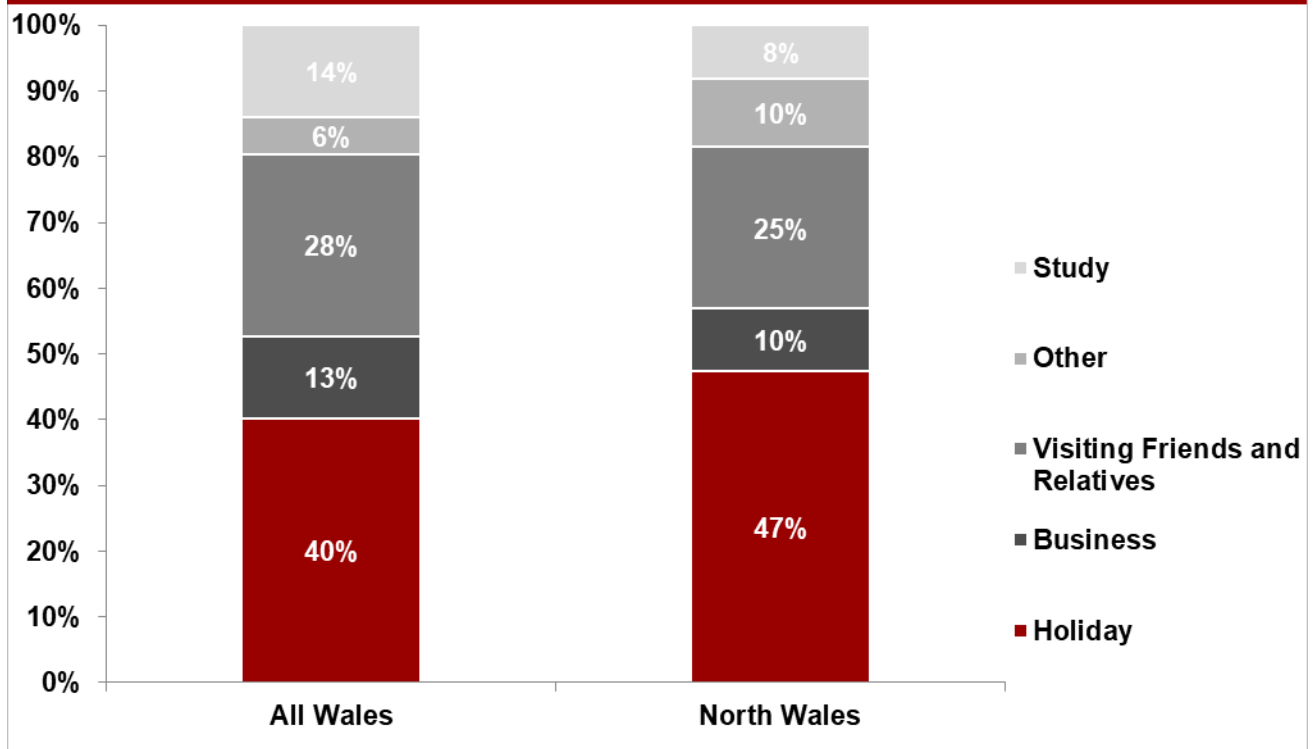
**Table 3.2 Related Expenditure (£ millions) of International Visits by Purpose of Trip to All Wales and North Wales – Annual Average 2016-2018**  
Source: International Passenger Survey

	All Wales	North Wales
<b>Total Expenditure</b>	<b>£446</b>	<b>£90</b>
Holiday	£179	£43
Business	£56	£9
Visiting Friends and Relatives	£123	£22
Other	£26	£9
Study	£62	£7

In 2016-2018, international visitors coming to North Wales to study generated 8 per cent (£7 million) of all international tourism related expenditure in the region. As seen for all Wales and all four Welsh regions, international visitors coming to study are responsible for a larger proportion of

related expenditure than volume of visits. For example, in 2016-2018, 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 8 per cent of all international tourism related expenditure in North Wales.

**Figure 3.5 Proportion (%) of Related Expenditure of International Visitors to All Wales and North 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 North 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 North Wales – Annual Average 2016-2018**

*Source: International Passenger Survey*

All Wales			North Wales		
<b>All Visits</b>	<b>1,060</b>	<b>100%</b>	<b>All Visits</b>	<b>299</b>	<b>100%</b>
1. Ireland	174	16%	1. Ireland	84	28%
2. USA	98	9%	2. USA	31	10%
3. Germany	81	8%	3. German	29	10%
4. France	78	7%	4. Netherlands	15	5%
5. Netherlands	56	5%	5. Poland	14	5%
6. Australia	56	5%	6. Australia	13	4%
7. Spain	49	5%	7. France	13	4%
8. Poland	45	4%	8. Spain	10	3%
9. Italy	43	4%	9. Switzerland	10	3%
10. Canada	34	3%	10. Canada	9	3%

The most common countries of origin for international visitors to North Wales were Ireland (28 per cent), followed by the USA (10 per cent) and Germany (10 per cent).

North Wales had similar countries listed in its top 10 when compared to Wales overall. The only dissimilarities being Switzerland (3 per cent) which replaces Italy (4 per cent) in the North Wales top 10.

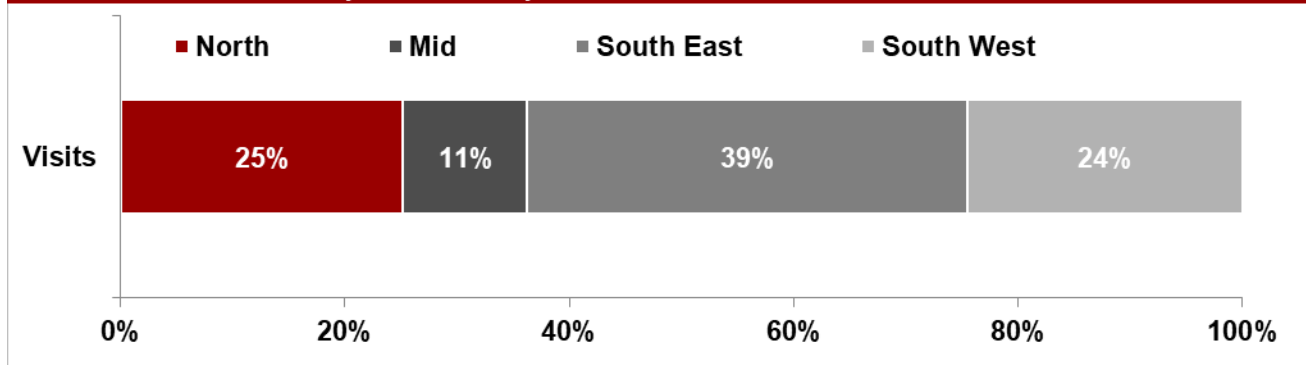
## 4. Tourism Day Visits

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 and 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.*

**Figure 4.0 Proportion (%) of Tourism Day Visits to each Welsh Region – Annual Average 2016-2018**

Source: Great Britain Day Visits Survey

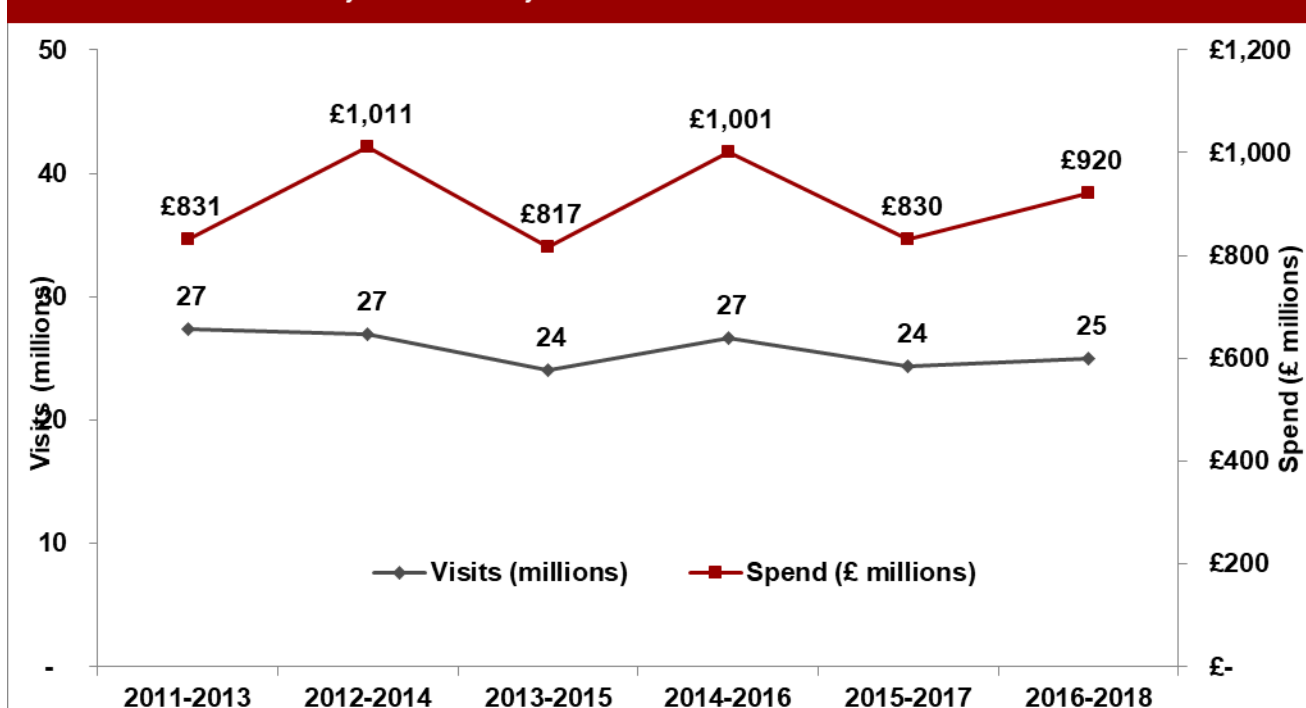


During 2016-2018, North Wales received an annual average of 25 million day visits with a related expenditure of £920 million. Moreover, North Wales accounted for 25 per cent of all Tourism Day visits to Wales.

### Tourism Day Visits and Related Expenditure

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

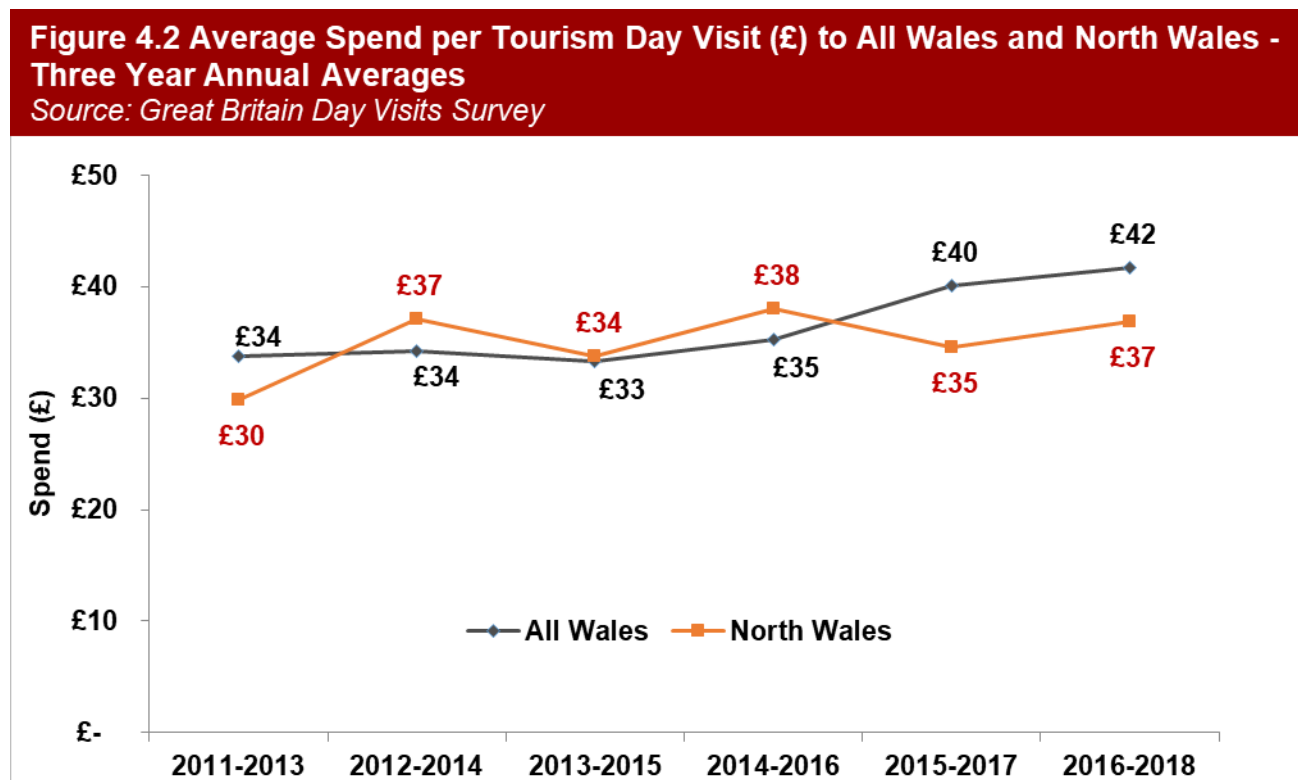
Source: Great Britain Day Visits Survey



The annual average volume of Tourism Day visits shown a slight downward trend over the last few years with decreases in 2013-2015 (to 24 million visits) and in 2015-2017 (to 24 million), but it recovered slightly in 2016-2018 (to 25 million).

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 2015-2017 has increased, reaching £920 million in 2016-2018.

### Average Spend per Visit



From 2012-2014 until 2014-2016, the average spend per Tourism Day visit in North Wales was higher than that of Wales overall. However, the average spend per Tourism Day visit in North Wales has been lower than of Wales in 2015-2017 and 2016-2018, at £35 and £37 respectively.

## 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 North Wales – Annual Average 2016-2018**

*Source: Great Britain Day Visits Survey*

All Wales			North Wales		
<b>All Visits</b>	<b>99.3</b>	<b>100%</b>	<b>All Visits</b>	<b>25.0</b>	<b>100%</b>
Visiting friends or family	22.3	22%	Visiting friends or family	5.2	21%
Going out for a meal	11.0	11%	Going out for a meal	3.5	14%
Outdoor activities	9.7	10%	Outdoor activities	2.9	12%
General day out	9.0	9%	General day out	3.2	13%
Going on a night out	7.3	7%	Going on a night out	1.1	5%
Special shopping	6.3	6%	Special shopping	1.0	4%
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	1.2	5%
Watching live sporting events	3.3	3%	Watching live sporting events	0.6	3%
Special personal events	3.0	3%	Special personal events	0.6	2%
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	0.6	2%
Other day out for leisure	3.0	3%	Other day out for leisure	1.3	5%

Just over a fifth (21 per cent, 5.2 million) of Tourism Day visitors to North Wales in 2016-2018 visited friends or family, making it the most popular activity undertaken. This was also seen in Wales as a whole, where 22 per cent (22.3 million) Tourism Day visits were to see friends or family in 2016-2018.

A higher proportion of Tourism Day visits to North Wales were to go out for a meal (14 per cent), for outdoor activities (12 per cent), and for a 'General Day Out' (13 per cent) compared to Wales on average. Conversely, a smaller proportion of Tourism Day visits to North Wales were for a night out (5 per cent), and for special shopping (4 per cent) compared to Wales overall.

## Type of Place Visited

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

*Source: Great Britain Day Visits Survey*

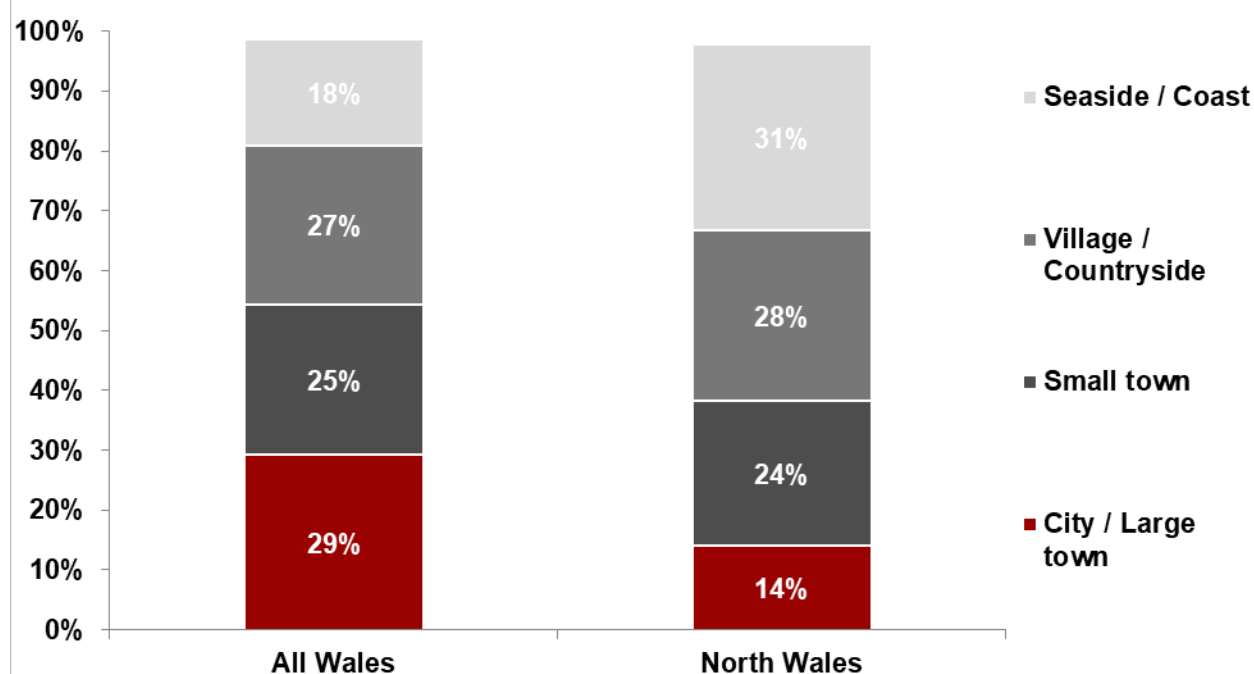
	All Wales	North Wales
<b>Total Visits</b>	<b>99</b>	<b>25</b>
City / Large town	29	4
Small town	25	6
Village / Countryside	26	7
Seaside / Coast	18	8

In North Wales, the type of place most visited on a Tourism Day visit during 2016-2018 was the seaside/coast, seeing over 3 in 10 (7 million) visits.

In comparison with all Wales, North Wales has a far higher proportion of Tourism Day visitors choosing to travel to the seaside/coast (18 per cent and 31 per cent respectively). On the other hand only 14 per cent of Tourism Day visitors to North Wales visited a city/large town in 2016-2018, compared to 29 per cent in all Wales.

**Figure 4.3 Proportion (%) of Tourism Day Visits to All Wales and North Wales by Type of Place Visited - Annual Average 2016-2018**

*Source: Great Britain Day Visits Survey*



*\*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 4.3 Volume of Tourism Day Visits (millions) by Mode of Transport to All Wales and North Wales – Annual Average 2016-2018**

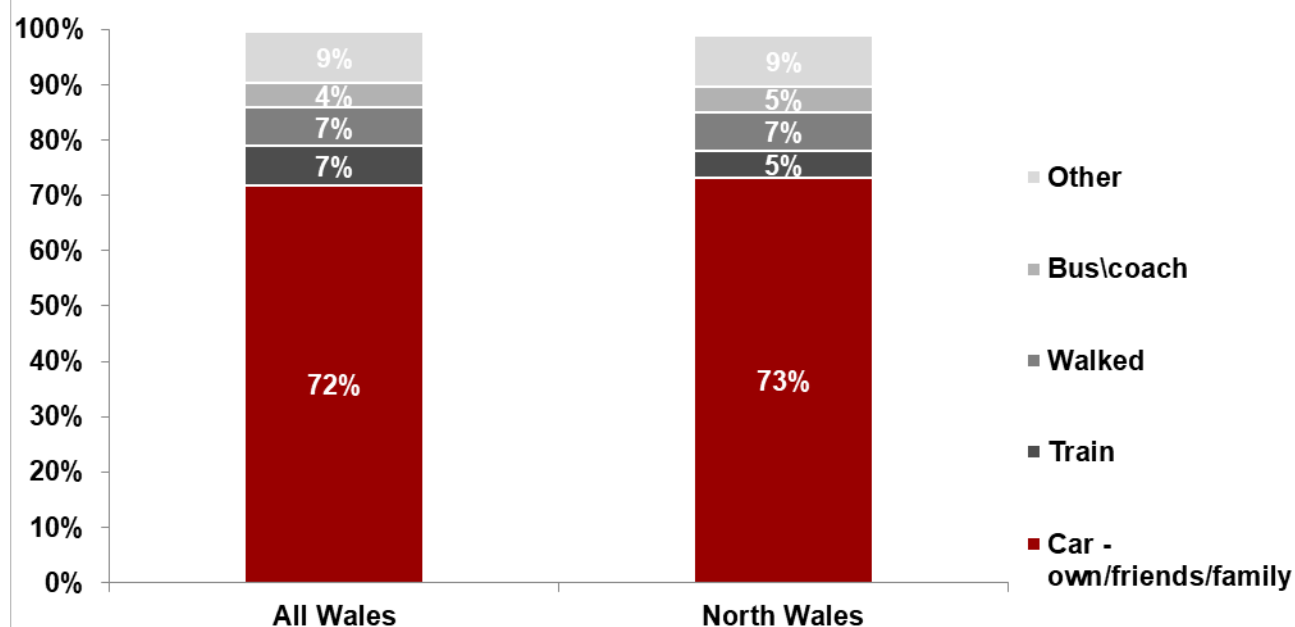
Source: Great Britain Day Visits Survey

	All Wales	North Wales
<b>Total Visits</b>	<b>99</b>	<b>25</b>
Car - own/friends/family	71	18
Train	7	1
Walked	7	2
Bus\coach	4	1
Other	9	2

Like the other regions in Wales, the car was the most preferred mode of transportation in North Wales, with the majority (73 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 2016-2018 (5 per cent and 7 per cent respectively).

**Figure 4.4 Proportion (%) of Tourism Day Visits to All Wales and North Wales by Mode of Transport Used - Annual Average 2016-2018**

Source: Great Britain Day Visits Survey



\*'Other' category includes: hired car, organised coach tour, taxi, bicycle, tube, tram, Motorised caravan/campervan, plane, boat, lorry/van



## Distance Travelled

**Table 4.4 Volume of Tourism Day Visits (millions) by Distance Travelled in All Wales and North Wales – Annual Average 2016-2018**

*Source: Great Britain Day Visits Survey*

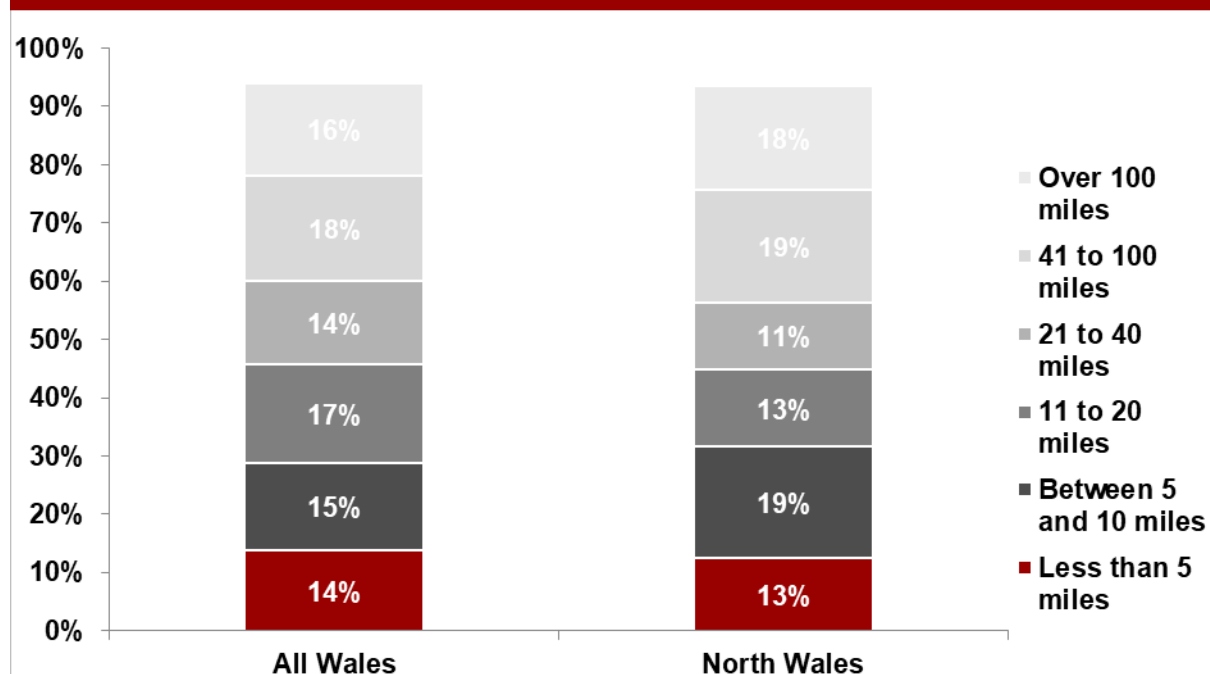
	All Wales	North Wales
<b>Total Visits</b>	<b>99</b>	<b>25</b>
Less than 5 miles	14	3
Between 5 and 10 miles	15	5
11 to 20 miles	17	3
21 to 40 miles	14	3
41 to 100 miles	18	5
Over 100 miles	16	4

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

The distribution of distances travelled for Tourism Day visits during 2016-2018 in North Wales follows the approximate distribution for Wales on average. Just under a third (32 per cent) of visits involved travelling up to 10 miles. After Mid Wales, North Wales saw the highest proportion of visits involving a journey of over 100 miles (18 per cent).

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

*Source: Great Britain Day Visits Survey*



*\*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 largest proportion 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 (46 per cent, 11.39 million).

The second most common region of origin of Tourism Day visitors to North Wales was North West England, with a quarter (25 per cent, 6.30 million) of Tourism Day visitors residing in this area in 2016-2018.

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

*Source: Great Britain Day Visits Survey*

	North Wales	
	Volume (millions)	%
<b>All Visits</b>	<b>25</b>	<b>100%</b>
North Wales	11.39	46%
North West England	6.30	25%
West Midlands	3.06	12%
East Midlands	0.69	3%
London	0.61	2%
Yorkshire and the Humber	0.56	2%
South East England	0.55	2%
East of England	0.37	1%
South West England	0.33	1%
North East England	0.28	1%
Mid Wales	0.24	1%
South East Wales	0.17	1%
South West Wales	0.08	0%
Scotland	0.07	0%

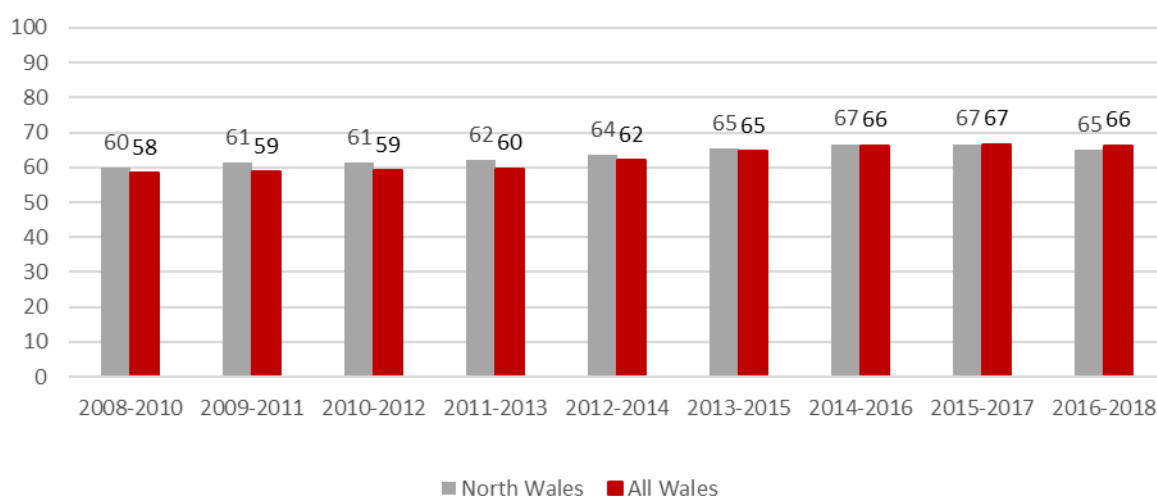
## 5. Accommodation Occupancy Rates

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, 2016-2018, unless stated otherwise. Further data in Appendix [Table 8.5](#).

### Hotels

**Figure 5.0 Three Year Annual Average Hotel Room Occupancy Rates (%) for All Wales and North Wales**

*Source: Visit Wales Occupancy Survey*

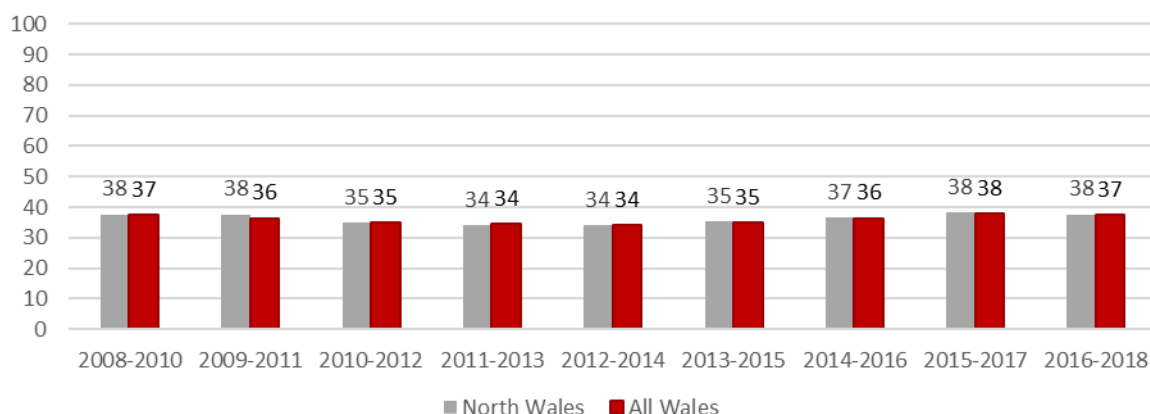


Room occupancy rates have risen over the years in North Wales, but dipped slightly to 65 per cent in 2016-2018, slightly below the overall Wales average of 66 per cent.

## Guesthouses and B&Bs

**Figure 5.1 Three Year Annual Average Guesthouse/Bed and Breakfast Room Occupancy Rates (%) for All Wales and North Wales**

*Source: Visit Wales Occupancy Survey*

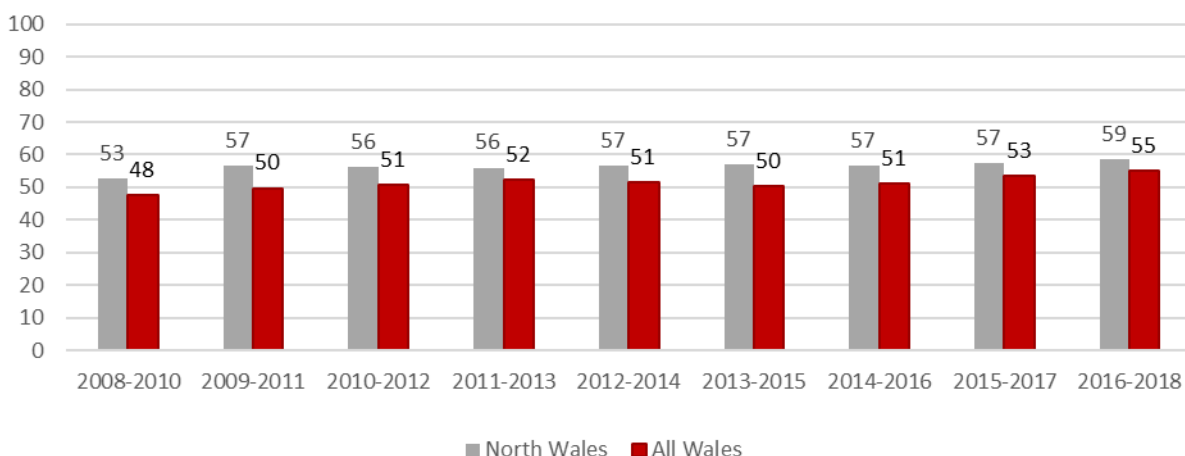


Guesthouse/B&B rates in North Wales have remained steady over the past few years and for 2016-2018, remain unchanged at 38 per cent, slightly above the overall Wales average of 37 per cent.

## Self-Catering

**Figure 5.2 Three Year Annual Average Self-Catering Unit Occupancy Rates (%) for All Wales and North Wales**

*Source: Visit Wales Occupancy Survey*

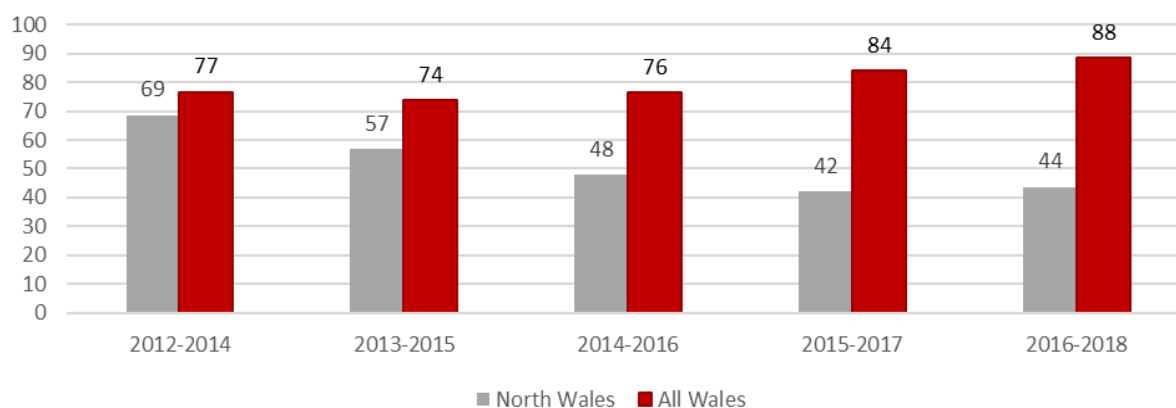


Even though the Self-Catering unit occupancy rates have remained similar in North Wales over the years, North Wales still has the highest rates of all the Welsh regions for this kind of accommodation. The Wales average for 2016-2018 was 55 per cent, while the rate in North Wales was 59 per cent.

## Static Caravan and Holiday Homes<sup>1</sup>

**Figure 5.3 Three Year May to October Average Static Caravan and Holiday Homes Unit Occupancy Rates (%) for All Wales and North Wales**

*Source: Visit Wales Occupancy Survey*

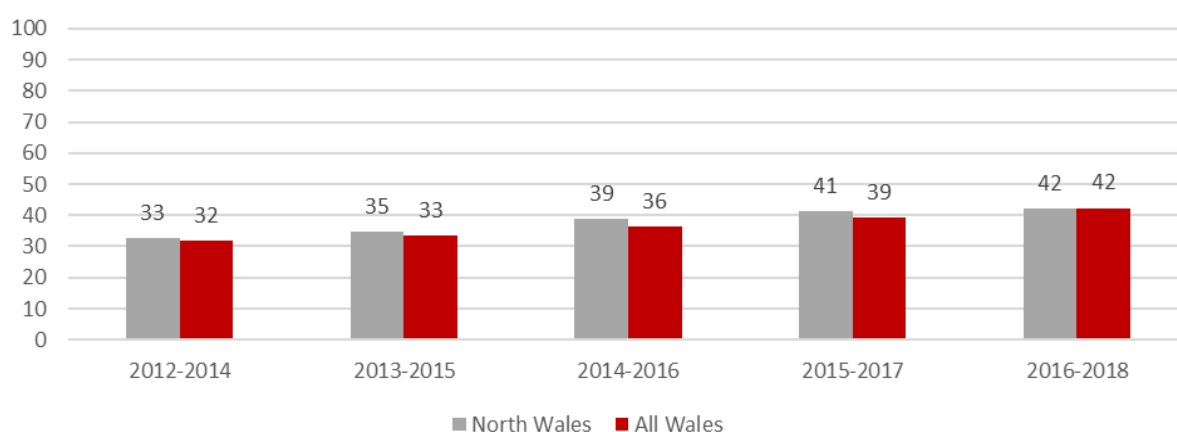


Since 2012-2014, Static Caravan and Holiday Homes unit occupancy rates in North Wales have rapidly declined. The region had the lowest rates of all the Welsh regions for this kind of accommodation in 2016-2018, with 44 per cent. This compares to the All Wales average of 88 per cent for the same period.

## Touring Caravan and Camping

**Figure 5.4 Three Year May to October Average Touring Caravan and Camping Pitch Occupancy Rates (%) for All Wales and North Wales**

*Source: Visit Wales Occupancy Survey*



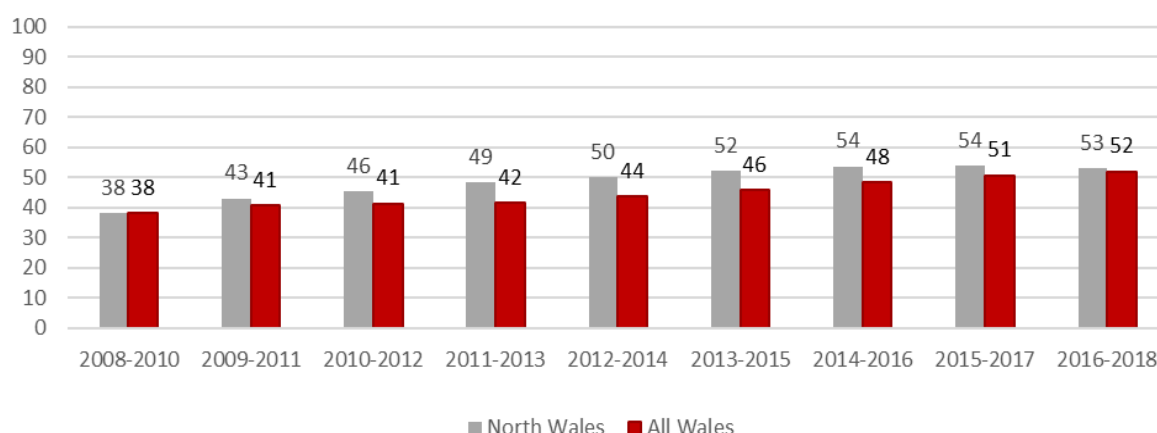
Touring Caravan and Camping occupancy rates in 2016-2018 were the same for North Wales as for Wales, with 42 per cent. Before this, since 2012-2014, occupancy rates were a few percentage points higher in North Wales than the all Wales average.

<sup>1</sup> North Wales Static Caravan and Holiday Home occupancy rate is based on a small sample

## Hostels

**Figure 5.5 Three Year Annual Average Hostel Bedspace Occupancy Rates (%) for All Wales and North Wales**

*Source: Visit Wales Occupancy Survey*



Hostel occupancy rates in North Wales for 2016-2018 (53 per cent) were only slightly above Wales overall. However, between 2010-2012 and 2014-2016 occupancy rates in North Wales were substantially higher than the all Wales average.

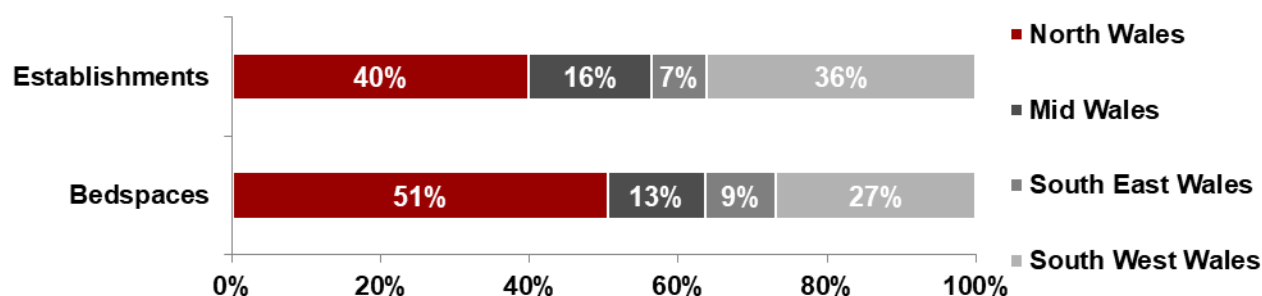
## 6. Bedstock

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).

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

*Source: Visit Wales Bedstock Survey*



**Table 6.1 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
<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 6.2 Volume of Bedspaces by Type of Accommodation in each Welsh Region and All Wales – 2013**

*Source: Visit Wales Bedstock Survey*

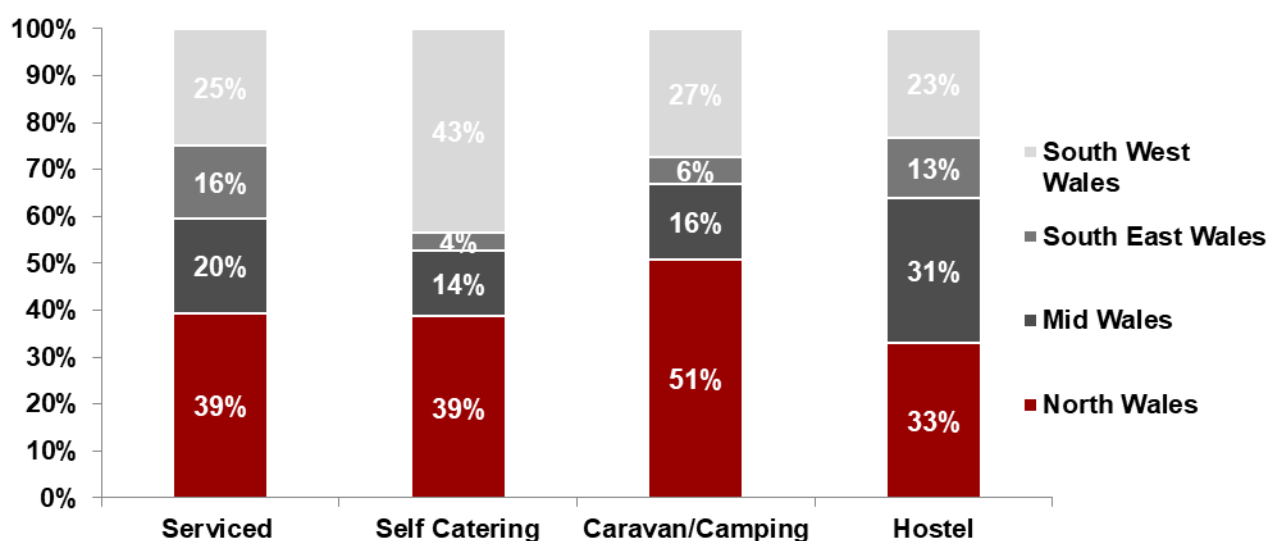
	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative *
Total Bedspaces in Wales	79,086	63,168	399,124	17,300	1,013
<b>North Wales</b>	<b>30,265</b>	<b>24,193</b>	<b>223,368</b>	<b>4,970</b>	<b>2</b>
Mid Wales	8,883	9,681	50,269	3,943	383
South East Wales	24,865	2,903	21,018	4,341	25
South West Wales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

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

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

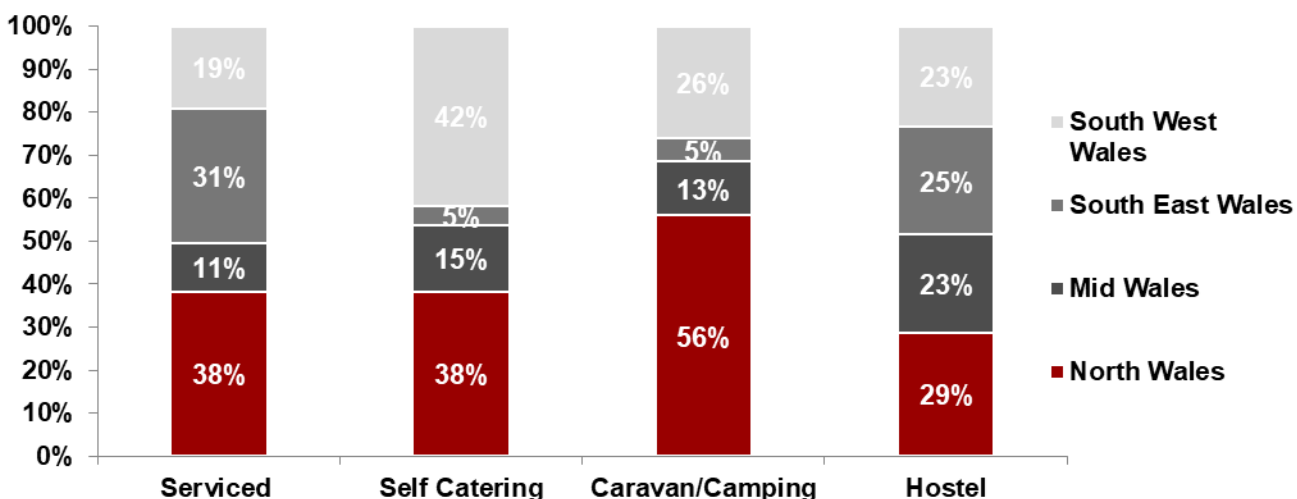
**Figure 6.1 Proportion (%) of Accommodation Bedstock Establishments in Wales by Welsh Region - 2013**

Source: Visit Wales Bedstock Survey



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

Source: Visit Wales Bedstock Survey

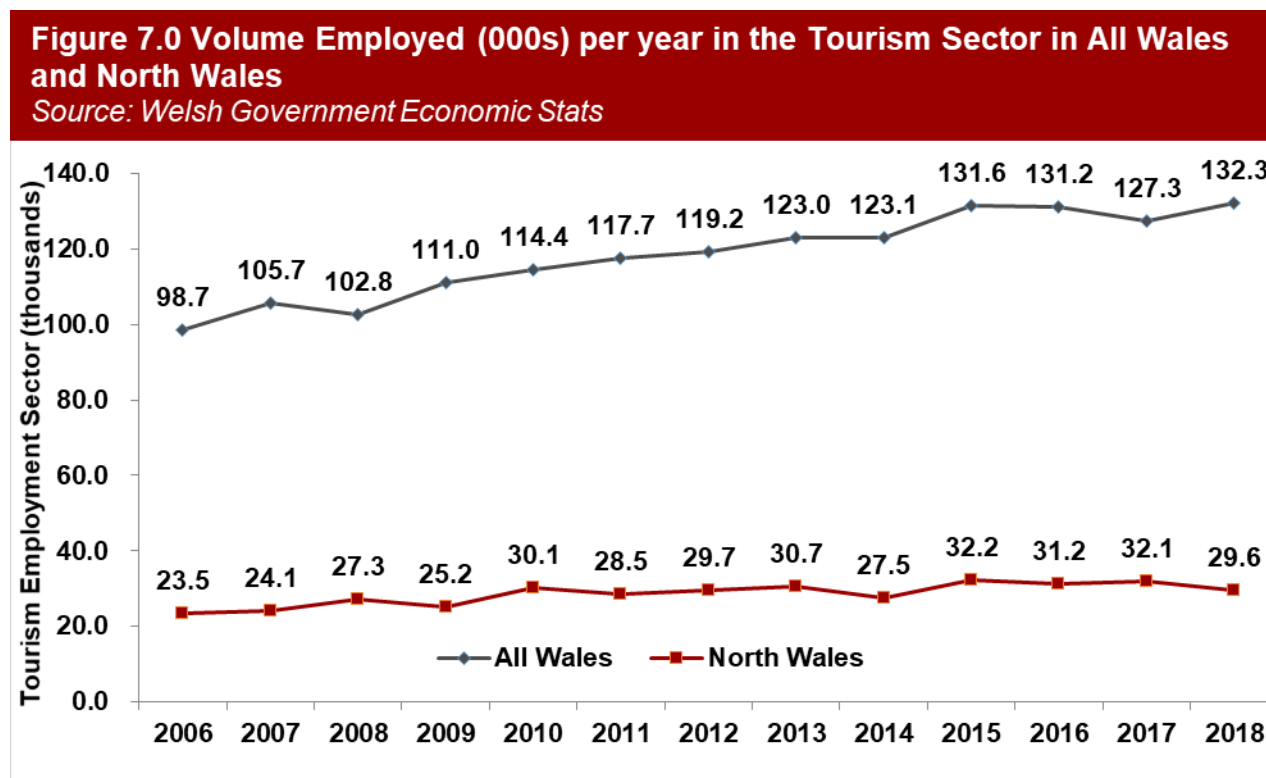


The proportion of accommodation bedspaces (Figure 6.2) in North Wales for serviced and self-catering are similar to those for establishments. For example North Wales had 39 per cent of all serviced establishments and 38 per cent of serviced bedspaces in Wales. In contrast, North Wales had a smaller proportion 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).



## 7. Tourism Sector Employment

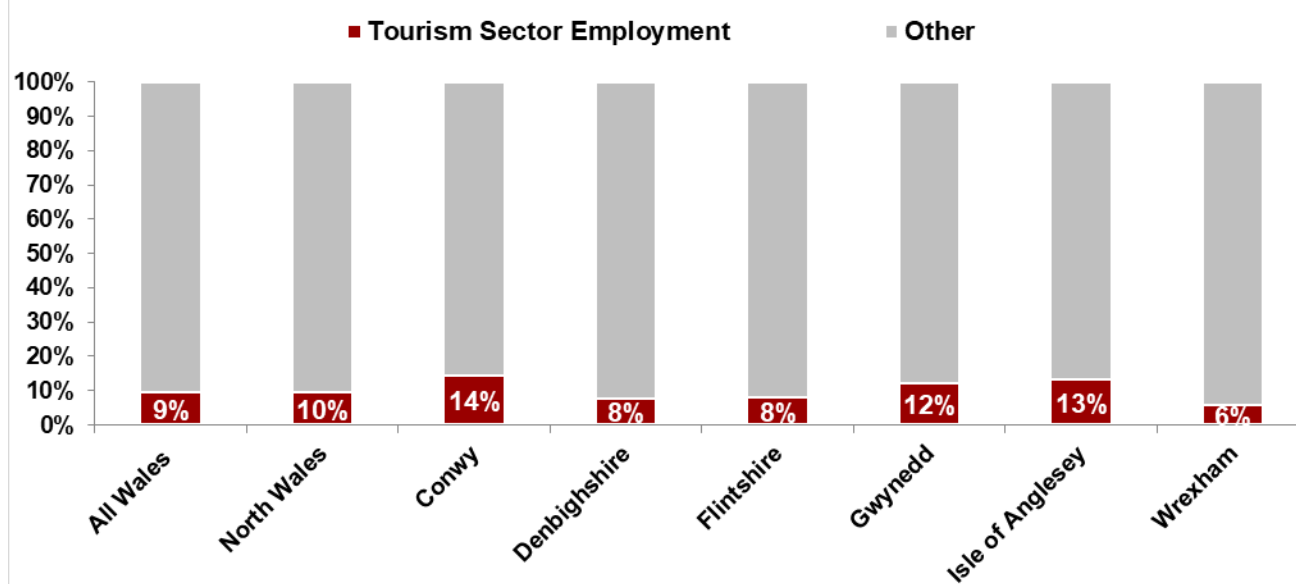
Data for this section has been sourced from the [Welsh Government Priority Sector Statistics](#).



There has been an increase of 4 per cent between 2017 and 2018 in the number of those employed in the tourism Sector in Wales as a whole, from 127,300 in 2017, to 132,300 in 2018. Over the same period, the volume of those employed in the tourism Sector in North Wales decreased by 8 per cent, from 32,100 to 29,600.

**Figure 7.1 Proportion (%) of Tourism Sector Employment compared to all Other Sectors within All Wales, North Wales and in each Local Authority in North Wales - 2018**

*Source: Welsh Government Economic Stats*



In 2018, the proportion of those employed in the tourism Sector in North Wales (10 per cent) was similar to that of all Wales (9 per cent). However, when looking at the individual local authorities in North Wales, the proportion for some was much higher – 14 per cent in Conwy, 13 per cent in Isle of Anglesey and 12 per cent in Gwynedd.

## 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
<b>North Wales</b>	<b>3.105</b>	<b>3.030</b>	<b>3.184</b>	<b>3.264</b>	<b>3.417</b>	<b>3.488</b>	<b>3.655</b>	<b>3.713</b>	<b>3.626</b>	<b>3.428</b>	<b>3.378</b>
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
<b>North Wales</b>	<b>12.035</b>	<b>11.822</b>	<b>12.346</b>	<b>12.988</b>	<b>13.415</b>	<b>13.354</b>	<b>13.575</b>	<b>13.199</b>	<b>13.222</b>	<b>12.221</b>	<b>12.450</b>
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
<b>North Wales</b>	<b>£492</b>	<b>£495</b>	<b>£508</b>	<b>£544</b>	<b>£545</b>	<b>£582</b>	<b>£591</b>	<b>£639</b>	<b>£639</b>	<b>£613</b>	<b>£626</b>
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
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

	Nights (000s)									
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
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

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

**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
<b>Mid Wales</b>	<b>89</b>	<b>82</b>	<b>87</b>	<b>78</b>	<b>80</b>	<b>77</b>	<b>80</b>	<b>85</b>	<b>98</b>	<b>107</b>	<b>107</b>
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
<b>Mid Wales</b>	<b>0.637</b>	<b>0.630</b>	<b>0.640</b>	<b>0.509</b>	<b>0.513</b>	<b>0.498</b>	<b>0.565</b>	<b>0.619</b>	<b>0.740</b>	<b>1.045</b>	<b>1.001</b>
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
<b>Mid Wales</b>	<b>£27</b>	<b>£24</b>	<b>£28</b>	<b>£27</b>	<b>£33</b>	<b>£34</b>	<b>£36</b>	<b>£39</b>	<b>£58</b>	<b>£62</b>	<b>£54</b>
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
<b>North Wales</b>	<b>27</b>	<b>27</b>	<b>24</b>	<b>27</b>	<b>24</b>	<b>25</b>
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
<b>North Wales</b>	<b>831</b>	<b>1,011</b>	<b>817</b>	<b>1,001</b>	<b>830</b>	<b>920</b>
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
<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
Bedspaces					
	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative
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

## 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
<b>North Wales</b>	<b>23.5</b>	<b>24.1</b>	<b>27.3</b>	<b>25.2</b>	<b>30.1</b>	<b>28.5</b>	<b>29.7</b>	<b>30.7</b>	<b>27.5</b>	<b>32.2</b>	<b>31.2</b>	<b>32.1</b>	<b>29.6</b>
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*

<b>Hotel/Motel</b>
Hotel
Motel
<b>Guest house/Farmhouse/B&amp;B</b>
Bed & Breakfast
Guest house
Farmhouse
<b>Self catering</b>
Self-catering in rented flat\apartment
Self-catering in rented house\chalet\villa\bungalow\cottage
Holiday camp\village - self catering
<b>Friend's home/Relative's home/Second home/Timeshare</b>
Friend's home
Relative's home
Own second home\timeshare
<b>Caravan and Camping</b>
Caravan and Camping

## Type of Accommodation used on an International Visit

**Table 8.9 Accommodation Categories – International visitors**

*Source: International Passenger Survey*

<b>Commercial Serviced</b>
Hotel/guest house
Bed & Breakfast
<b>Guest with relatives or friends</b>
Free guest with relatives or friends
Paying guest family or friends house
<b>Camping/Caravan</b>
Camping/Caravan
<b>Rented House/Flat</b>
Rented House/Flat
<b>Hostel/university/school</b>
Hostel/university/school
<b>Other</b>
Holiday Village
Own home
Other