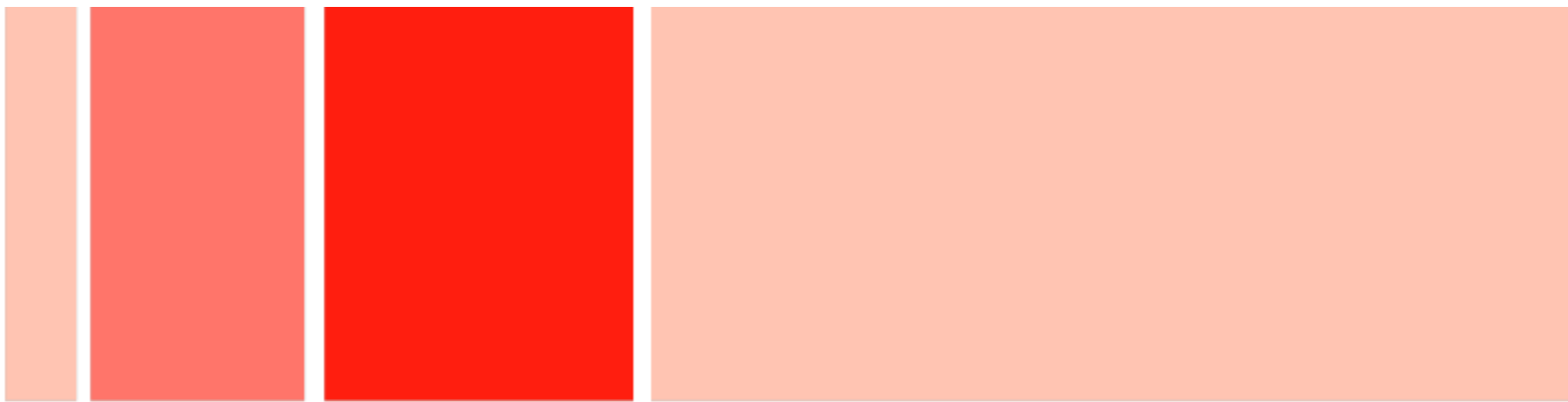




SOCIAL RESEARCH NUMBER:
13/2017
PUBLICATION DATE:
08/03/2017

Regional Tourism Profiles, 2014: Mid Wales



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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Subtitle: Mid Wales

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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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Regional Tourism Profiles, 2014

Mid Wales

Trips (Thousands)	2011-2013 Average	2012-2014 Average	% change
Overnight Visits (GB residents)	1,618	1,717	+6%
Overnight Visits (International)	80	82	+3%
Day Visits	11,000	13,000	+18%
Total	12,698	14,799	+17%

Expenditure (£ millions)	2011-2013 Average	2012-2014 Average	% change
Overnight Visits (GB residents)	262	281	+7%
Overnight Visits (International)	35	37	+6%
Day Visits	371	371	0%
Total	668	689	+3%

The Mid Wales region consists of the Local Authorities of Powys and Ceredigion. Powys is the least densely populated region in Wales, and the second least densely populated in England and Wales, with just 26 people per square km, while Ceredigion, at 43 people per square km, is also among the five least densely populated regions of England and Wales, and is the second least densely populated region in Wales.

It comes therefore as no surprise that the overwhelming majority of this region is classed by the ONS as “Village, Hamlet and Isolated Dwellings”, with the only exceptions being small regions round the major towns, and some of the most south-easterly part.

The major towns in this region are the university towns of Aberystwyth and Lampeter, as well as Newtown, Llandrindod Wells, Builth Wells, home to the Royal Welsh Showground, Hay-on-Wye, where the Hay Festival takes place, and Brecon. Most of the Brecon Beacons National Park, which is also one of Wales’ two Dark Sky Reserves, is in this region, as well as over half of the Dyfi Biosphere.

1. Overnight Visits from the UK

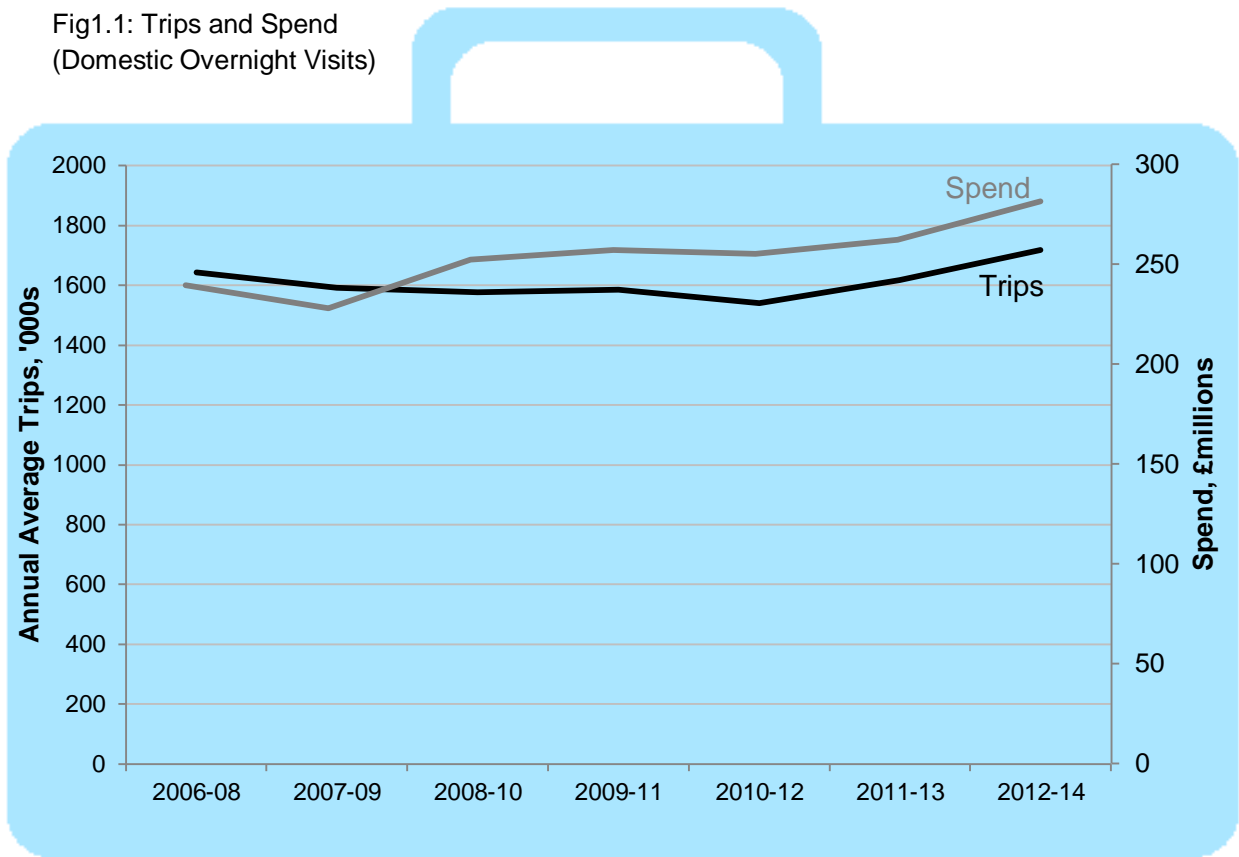
Data in this section come from the GB Tourism Survey. Unless otherwise stated, results are for the years 2012-14. Results in this section use the older definition of the Mid Wales region, including Meirionnydd.

Domestic overnight visits to Mid Wales make up about 17% of the total of such visits to Wales, less than any other region. Spend on these visits also accounts for 17% of total spend on domestic overnight visits to Wales.

The number of domestic overnight trips to Mid Wales fell slightly from the 2006-08 starting point of 1,642,000 trips per year, but has recovered since 2010-2012, and now stands at 1,717,000 trips per year, more than at the beginning of the period.

Spend on domestic overnight trips to Mid Wales has risen fairly steadily over the last nine years, from an annual average of £239 million in 2006-08 to £281 million per year in 2012-14.

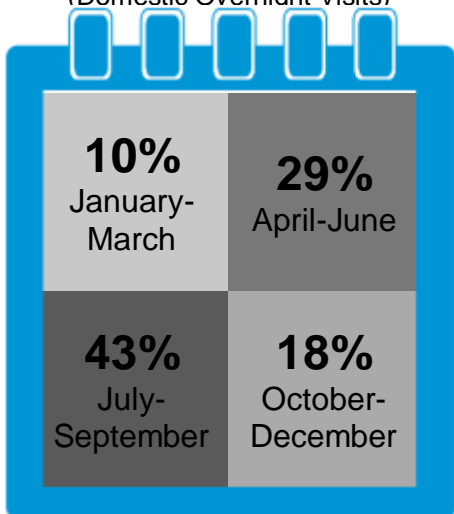
Fig1.1: Trips and Spend
(Domestic Overnight Visits)



Purpose of Visit

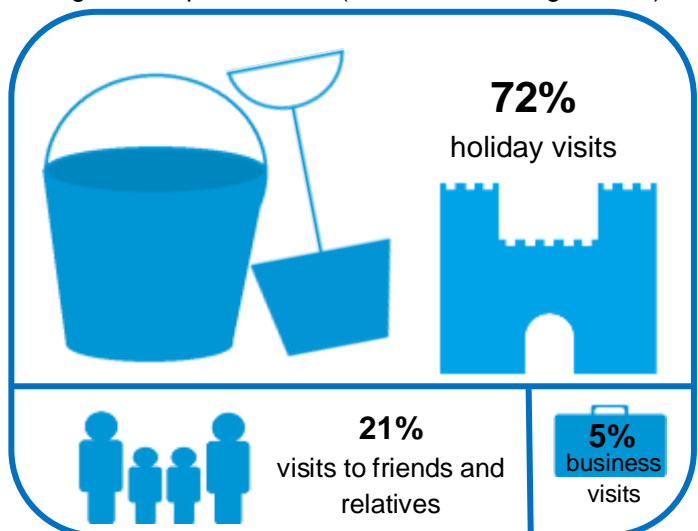
Mid Wales has a slightly higher proportion of domestic overnight holiday visits than Wales as a whole, with correspondingly lower proportions of visits to friends and relatives and business visits.

Fig. 1.2: Start Quarter of Visit
(Domestic Overnight Visits)



Seasonality of Visits

Fig.1.3: Purpose of Visit (Domestic Overnight Visits)

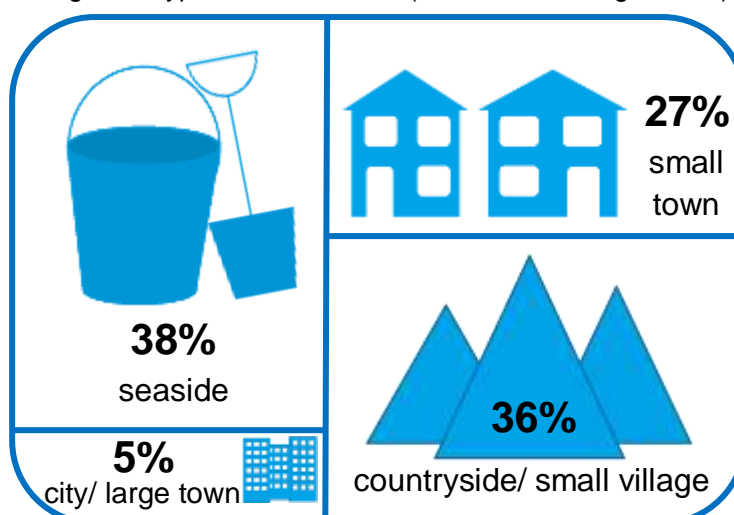


Probably connected with these higher proportions of holiday visits, domestic overnight visits to Mid Wales were even more likely than average to take place in the peak summer season, i.e., the months July to September. Indeed, Mid Wales shows the most seasonality of any Welsh region, with over four-tenths of all visits starting in July to September.

Type of Place

The most popular destination type for domestic overnight visits within Mid Wales was the seaside, perhaps surprisingly for a region with proportionately less coast than the Wales average.

Fig. 1.4: Type of Place Visited (Domestic Overnight Visits)



The least popular destination type was a city or large town, with visitors to this region being the least likely of all visitors to Welsh regions to report that they stayed in this type of place. This is less surprising, owing to the lack of cities or large towns in this region (some might argue that there are *no* large towns in this region!)

The choosing of the categories is done by respondents and is subjective, so that a respondent who stayed, for example, in Aberystwyth, might classify it as either a “seaside” destination, or a “small town”, or a “large town”, depending on what sort of destination they thought it was.

Region of Origin

Table 1.1: Region of Origin (Domestic Overnight Visits)

Region of Origin	Annual Average Trips (Thousands)	Proportion of all Trips to Mid Wales
Scotland	25	1%
Wales	358	21%
North East England	14	1%
North West England / Merseyside	240	14%
Yorkshire / Humberside	53	3%
East Midlands	101	6%
West Midlands	455	26%
East of England	76	4%
London	63	4%
South East England	149	9%
South West England	183	11%

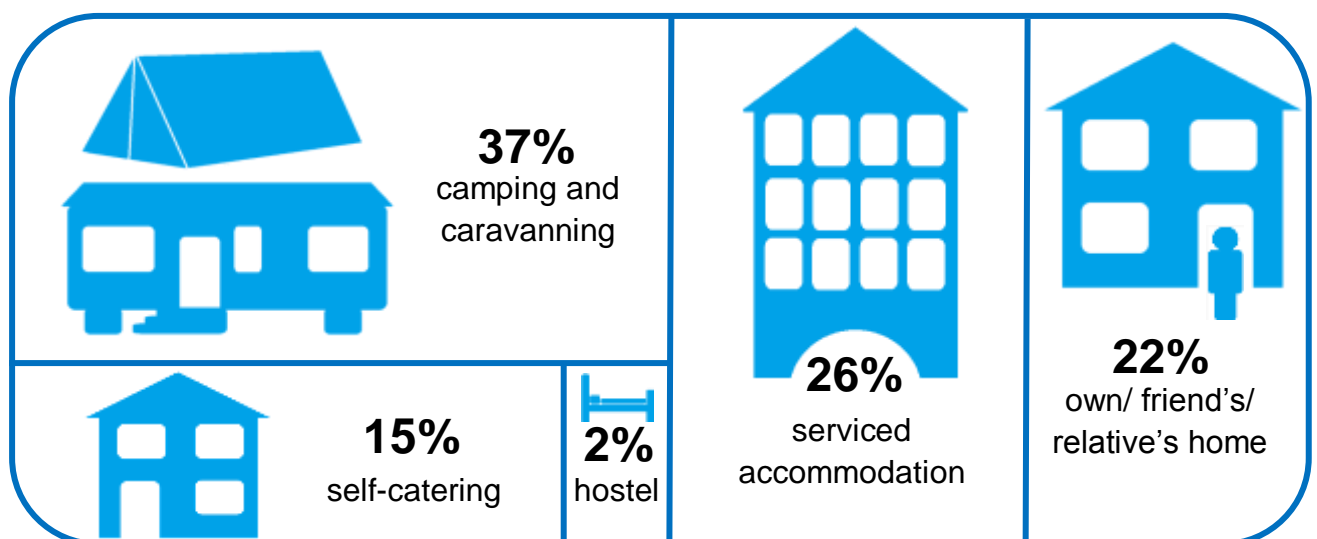
This region has the largest proportion of domestic overnight visitors from the West Midlands of all regions of Wales, with approximately a quarter of all domestic overnight visitors to Mid Wales coming from the West Midlands. There is a slightly lower than average proportion of

domestic overnight visitors to this region who originate within Wales. The high proportion of visitors from the West Midlands is almost certainly due to the geographic proximity of this region to the West Midlands region, as well as transport links, including the Aberystwyth to Birmingham railway.

Type of Accommodation

Domestic overnight visitors to Mid Wales are most likely to stay in caravan or camping accommodation, with this region hosting the largest proportion of visitors staying in such accommodation out of any region of Wales. This region also had the lowest proportion of domestic overnight visitors staying in hotels and guesthouses. Note that visitors who stayed in their own caravan are included in the “camping and caravanning” figures rather than the “own/friend’s/relative’s home” figures.

Fig. 1.5: Type of Accommodation (Domestic Overnight Visits)



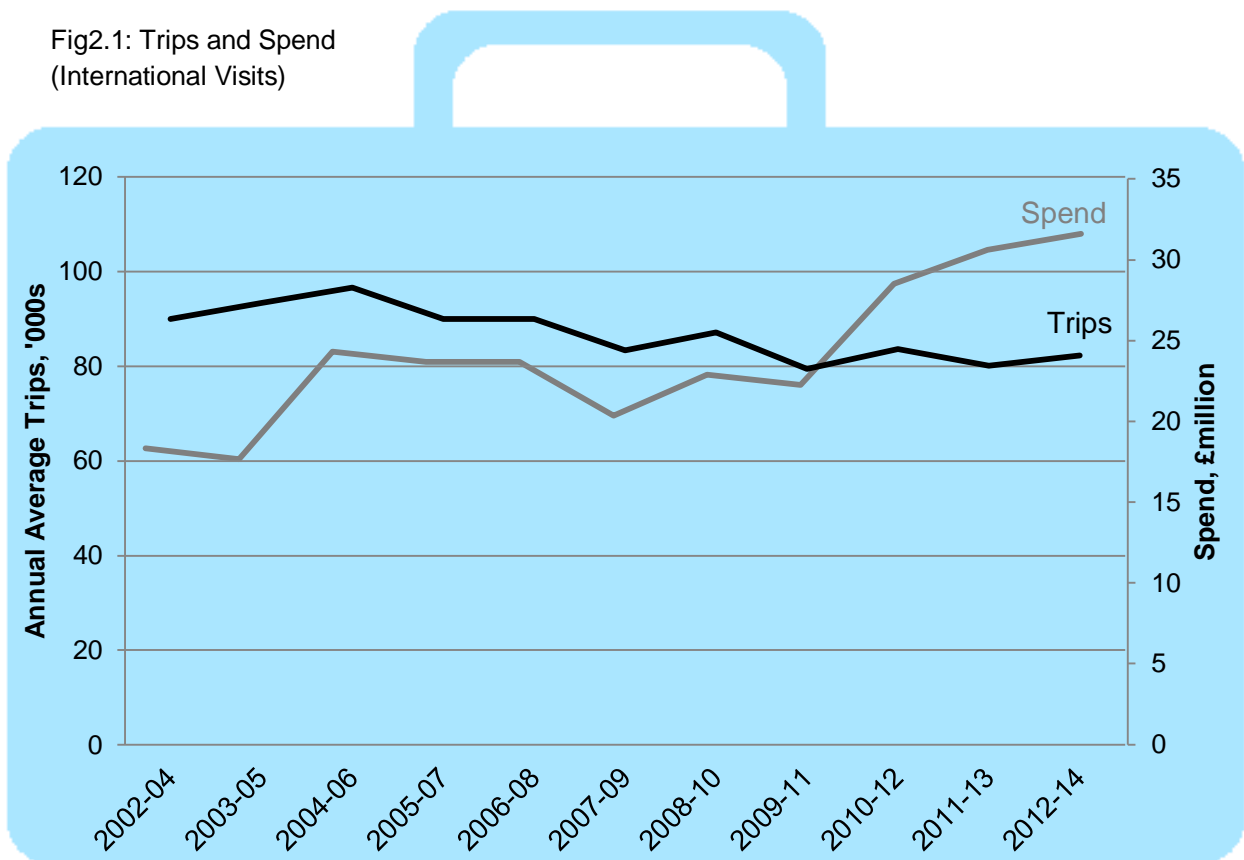
2. International Visits

Data in this section come from the International Passenger Survey. Unless otherwise stated, results are for the years 2010-14. Results in this section use the older definition of the Mid Wales region, including Meirionnydd.

Mid Wales gets a fairly small proportion of international visits, about 9% of all such visits to Wales, and a similar proportion of spend from international visits (around 10% of all spend).

The number of international visits to Mid Wales has fallen from 2002-2004, when there were, on average, 90,000 visits per year, compared with 82,000 per year in the years 2010-2014. Spend however has risen from an average of £23 million per year to £37 million per year over the same time period.

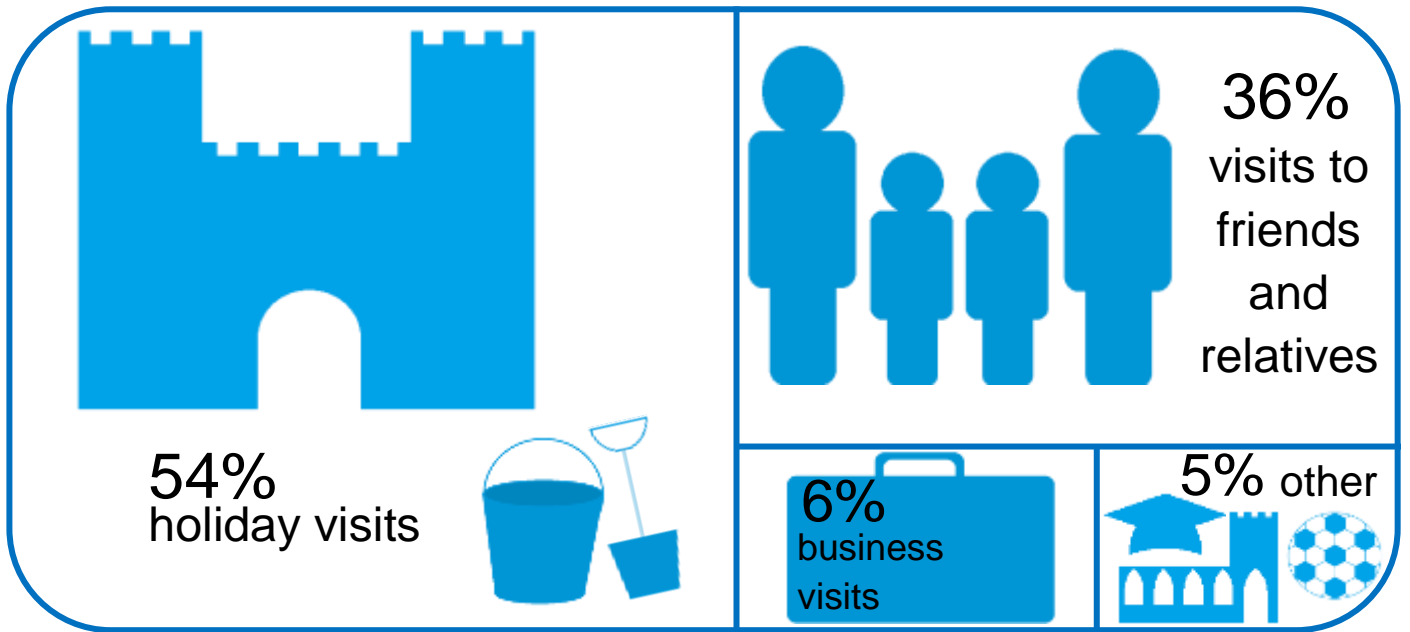
Fig2.1: Trips and Spend
(International Visits)



Purpose of Trip

Just over half of all international trips to Mid Wales are for holidays, a higher proportion than in any other Welsh region. There is a lower proportion of business visitors than the Wales average.

Fig. 2.2: Purpose of Trip (International Visits)



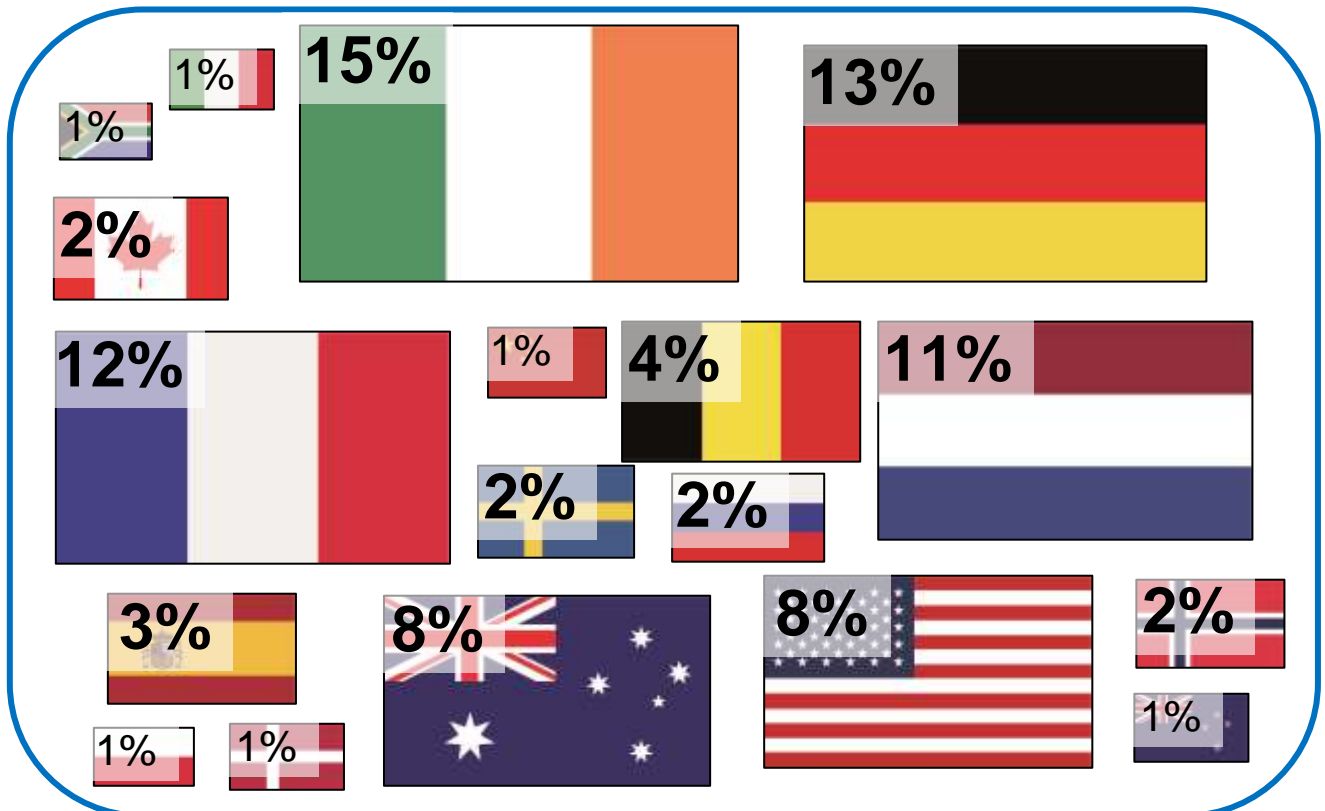
Country of Origin

The most common country of origin for international visitors to Mid Wales was the Republic of Ireland, followed by Germany and France.

Destination Towns

The most popular towns for international visitors are Aberystwyth, with just under 15,000 international visitors per year, and Brecon, with nearly 12,000.

Fig. 2.3: Origin of International Visits



3. Day Visits

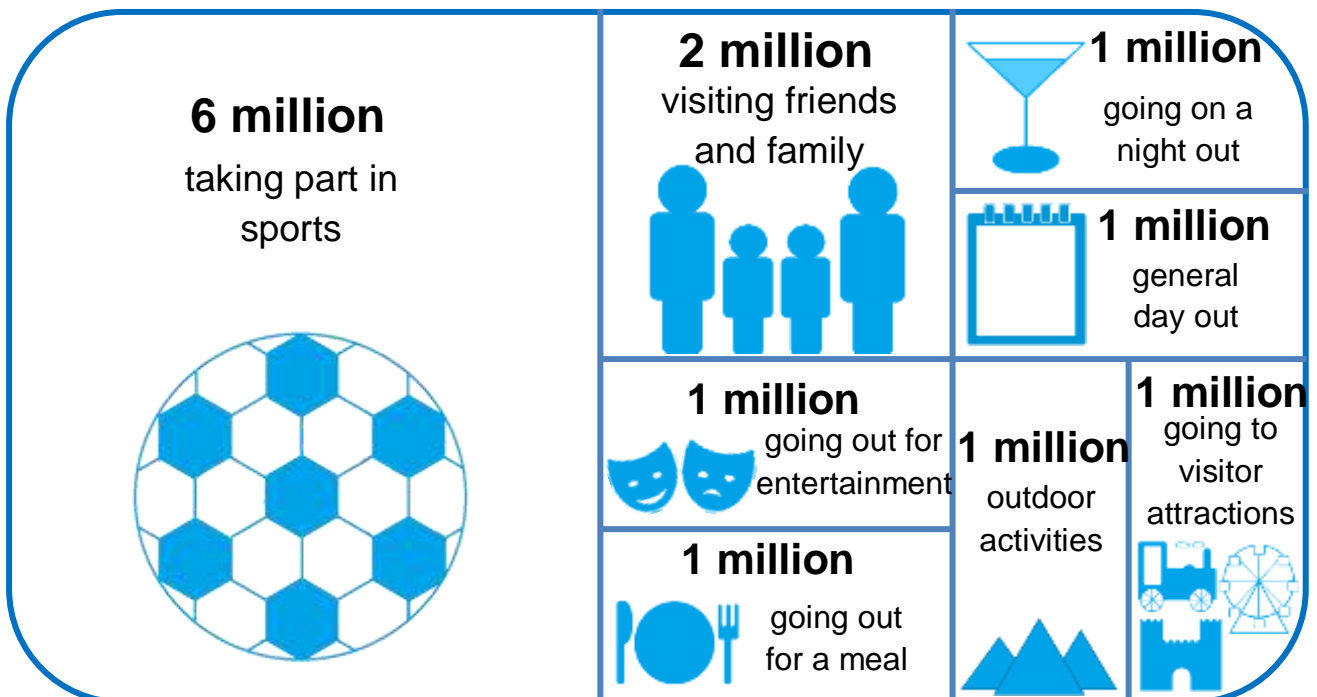
Data in this section come from the GB Day Visits Survey, unless otherwise stated. Unless otherwise stated, results are 2014 only. Results in this section use the older definition of the Mid Wales region, including Meirionnydd.

On average, over the four years, 2011-2014, there were 12 million tourism day visits to destinations in Mid Wales per year, 13% of all such visits to Wales. The average spend on such visits was £367 million per year, 11% of all spend on tourism day visits in Wales. This region attracts the least amount of both day visits and associated spend of any region of Wales. Although this may seem disheartening, it is worth remembering that in general, a high proportion of day visits to a region originate in that region. As Mid Wales is the most sparsely populated region of Wales, and indeed one of the most sparsely populated regions of England and Wales, it is perhaps not surprising that this region sees proportionately fewer day visits.

Activities Undertaken

The most popular day visit activity in Mid Wales was taking part in sports, with 6 million visits last year including this as an activity. This is a far higher proportion than in any other region of Wales, and possibly reflects the opportunities which this region offers to take part in outdoor sports such as mountain biking.

Fig. 3.1: Common Day Visit Activities

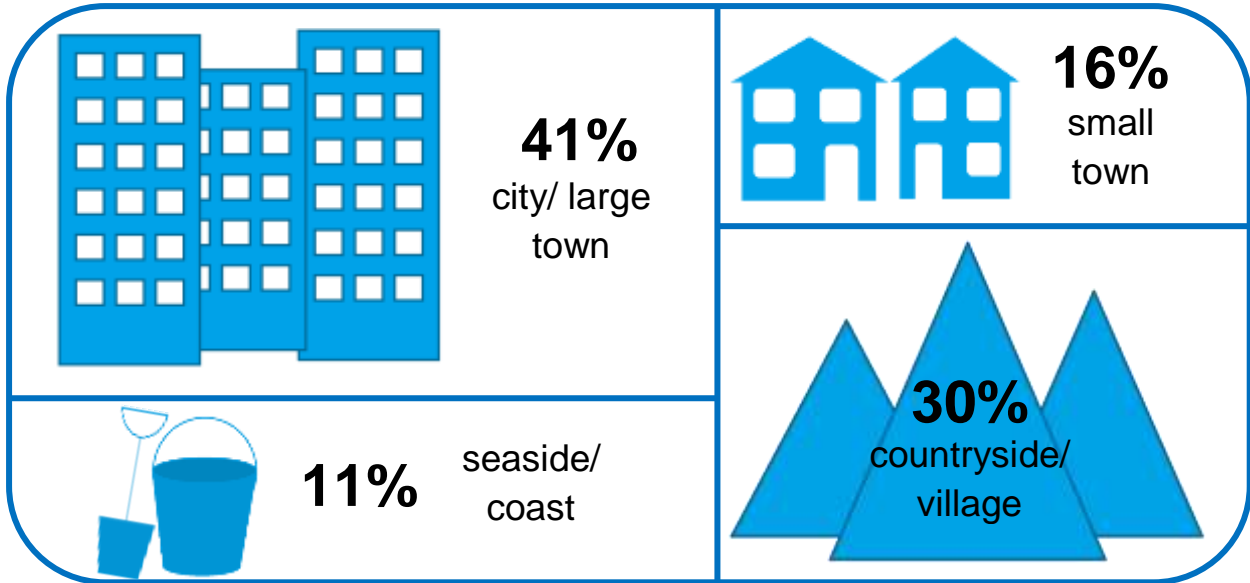


All activities undertaken on at least 1 million visits.

Type of Place

An unexpectedly high proportion of day visits were to a large town or city, with this being the most commonly visited type of place in Mid Wales. Although this may initially seem surprising, it should be remembered that a high proportion of day visitors are relatively local, and that the choice of place type is subjective. So although a visitor from Birmingham might not consider Aberystwyth, for example, to be a large town, a visitor from Powys might well do so.

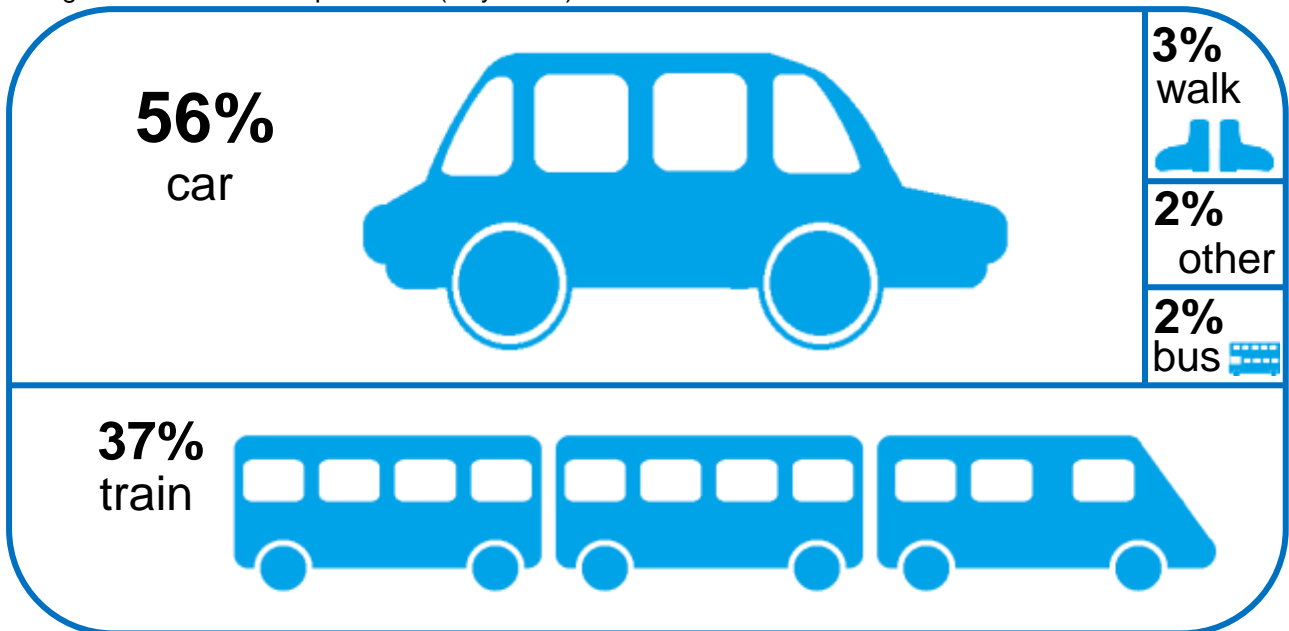
Fig. 3.2: Types of Place Visited (Day Visits)



Transport Used

There is also a possible link between the large proportion of visits undertaken using the train and the proportion of visits to large towns, as generally speaking train stations are in larger towns. This region has the highest levels of train use for day visits by far, with over a third of day visitors to Mid Wales using the train as the main mode of transport.

Fig. 3.3: Mode of Transport Used (Day Visits)

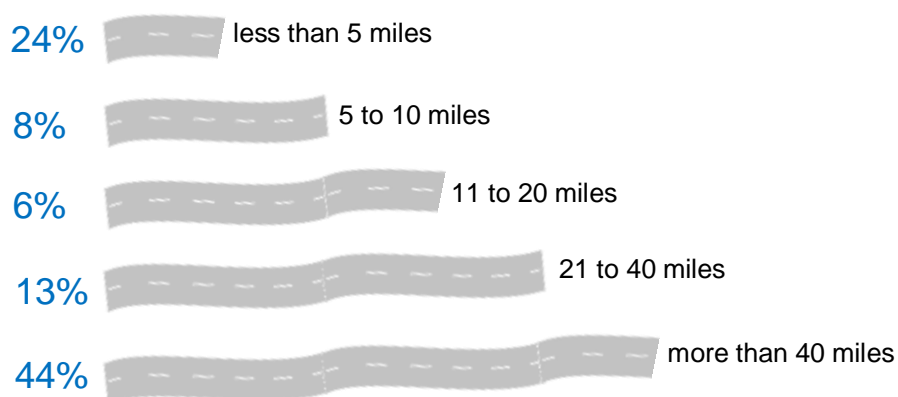


It is worth noting at this point that this region does include a major Welsh train route, the Aberystwyth to Shrewsbury line, as well as a good part of the slightly less well used Heart of Wales line. There were an estimated 303,700 journeys beginning or ending in Aberystwyth station alone in the financial year 2014-15 (Source: Office of Rail and Road).

Distance Travelled

A very large proportion of day visits to Mid Wales involved a journey of over forty miles, while nearly a quarter involved a journey of less than five miles. This region has the highest proportion of day visitors who are travelling very long or very short distances, and the lowest proportion of day visitors travelling between 5 and 40 miles. The large proportion of long journeys would fit with the rural character of the region, but the frequency of very short journeys is surprising.

Fig. 3.4: Distance Travelled (Day Visits)



Region of Origin

Mid Wales is unusual in that only a fairly small proportion of day visits to Mid Wales originate in the region, although quite a considerable number originate within Wales. There is no one particular region from which day visitors are most likely to originate. Although the West Midlands is a fairly common region of origin for day visitors to Mid Wales, it is not nearly as important as it is to overnight visits.

Table 3.1: Region of Origin (Day Visits)

Region of Origin	Number of Visits, Millions
Mid Wales	2
South West Wales	1
South East Wales	2
North West England / Merseyside	1
West Midlands	2

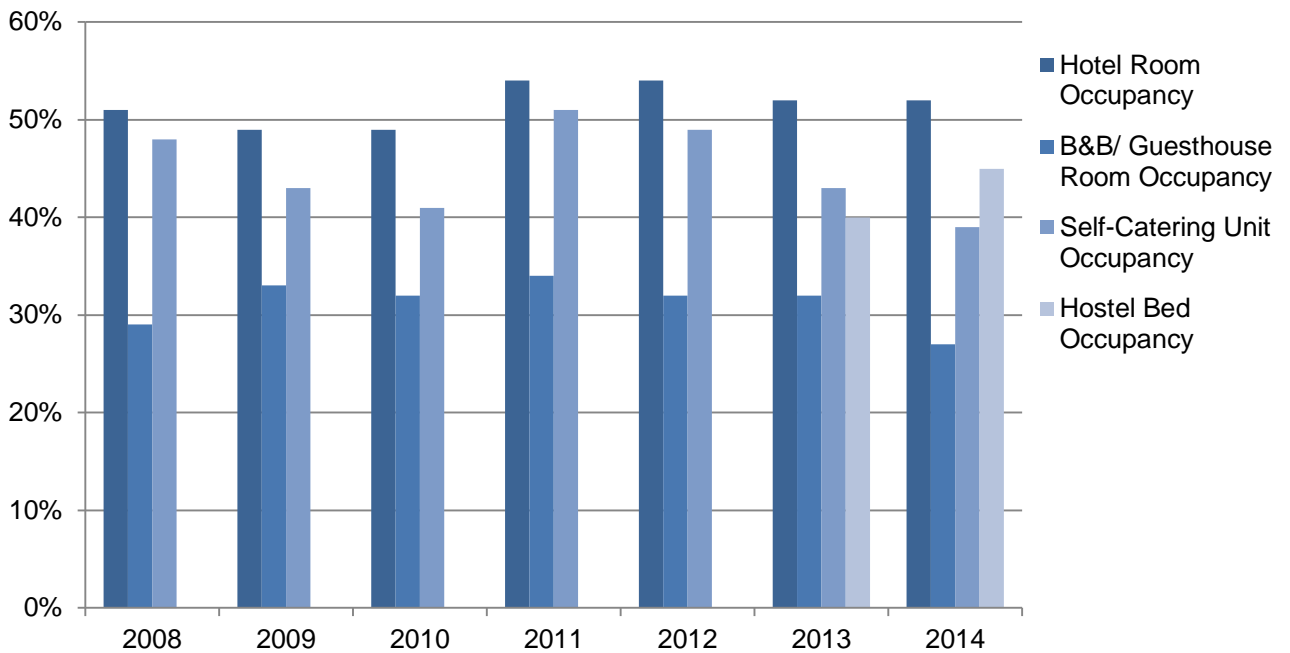
Includes all regions which are the region of origin for at least 1 million day visits.

4. Accommodation Occupancy

Data in this section come from the Wales Tourism Accommodation Occupancy Survey. Results in this section use the older definition of the Mid Wales region, including Meirionnydd.

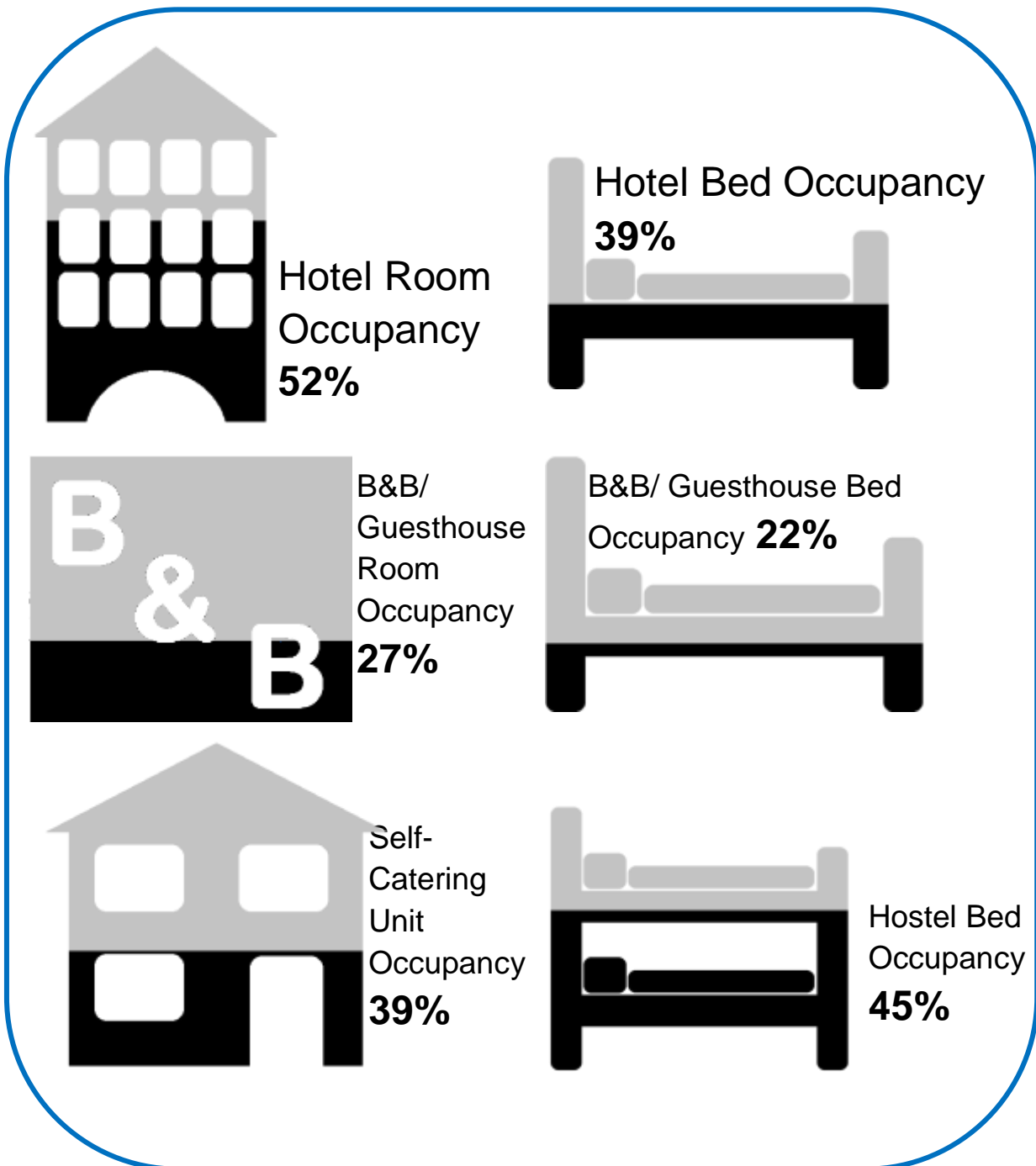
Mid Wales does not fare very well in the occupancy statistics compared to the other Welsh regions, having the lowest bed and room occupancy rates for hotels and B&Bs/ Guesthouses, as well as the lowest occupancy of self-catering units.

Fig. 4.1: Occupancy Rate over Time



There seems to be little discernable trend in the change in occupancy rates over time, although there is a slight tendency for the occupancy rates to increase up to about 2011-12 and then decrease.

Fig. 4.2 Occupancy Rate, 2014

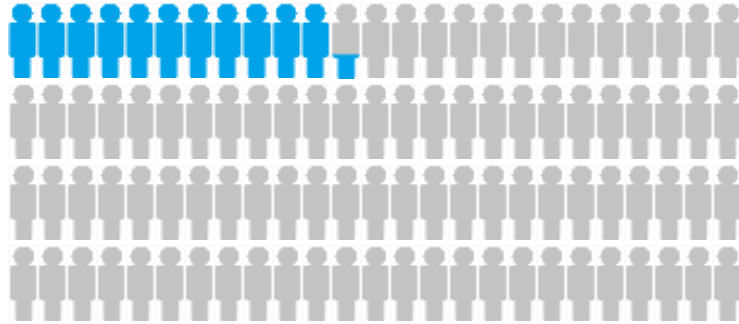


5. Employment

Data in this section come from the Welsh Government Priority Sector Statistics. Unless otherwise stated, results are for 2014 only.

Tourism is clearly of particular importance to the economy of Mid Wales, with 11.3% of all employment in the region being in the tourism sector, the highest proportion of any region in Wales. In 2014, employment in the sector was 17,600, an increase from the figure of 15,100 in 2005. The proportion of employment which is in the tourism sector has also increased over this period.

Fig. 5.1: Employment in Tourism



Powys and Ceredigion have roughly similar proportions of employment in tourism. Although the proportion for Ceredigion tends to be slightly higher, this varies depending on the year.

Fig. 5.2: Proportion of Employment in the Tourism Sector

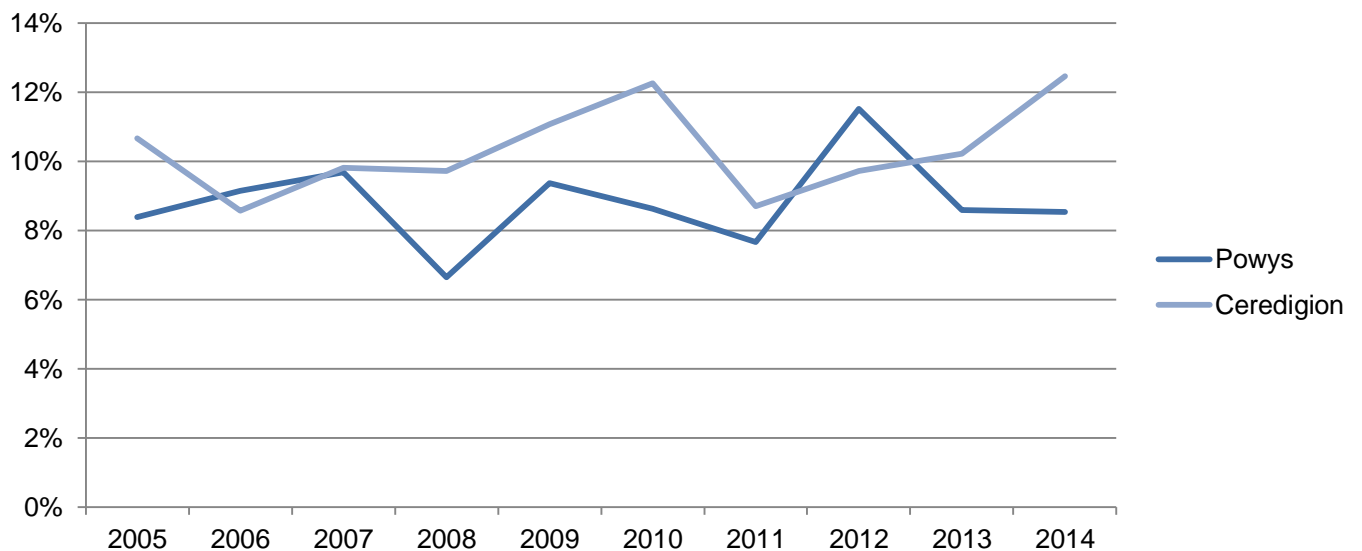
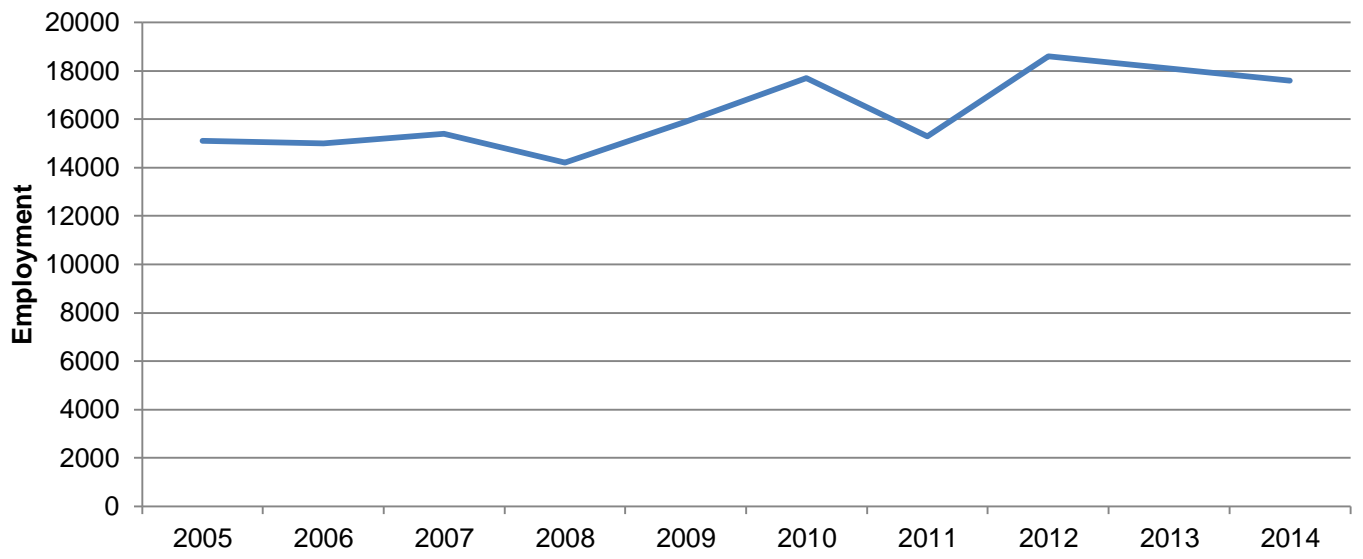


Fig. 5.3 Employment in Tourism over Time



6. Bedstock

Data in this section come from the Accommodation Bed stock report. Unless otherwise stated, results are 2013 only.

About 13% of the bedspaces in Wales available for tourists are in Mid Wales, and 16% of accommodation establishments, so this region provides about one-eighth, in total, of all the bedspaces available to visitors.

Fig. 6.1: All Tourism Bedstock

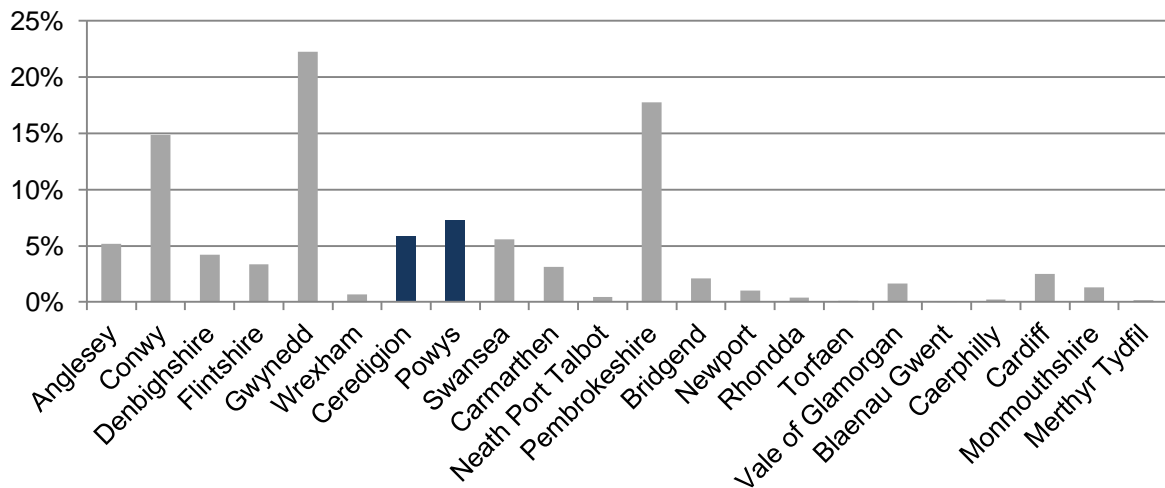


Fig. 6.2: Serviced Bedstock

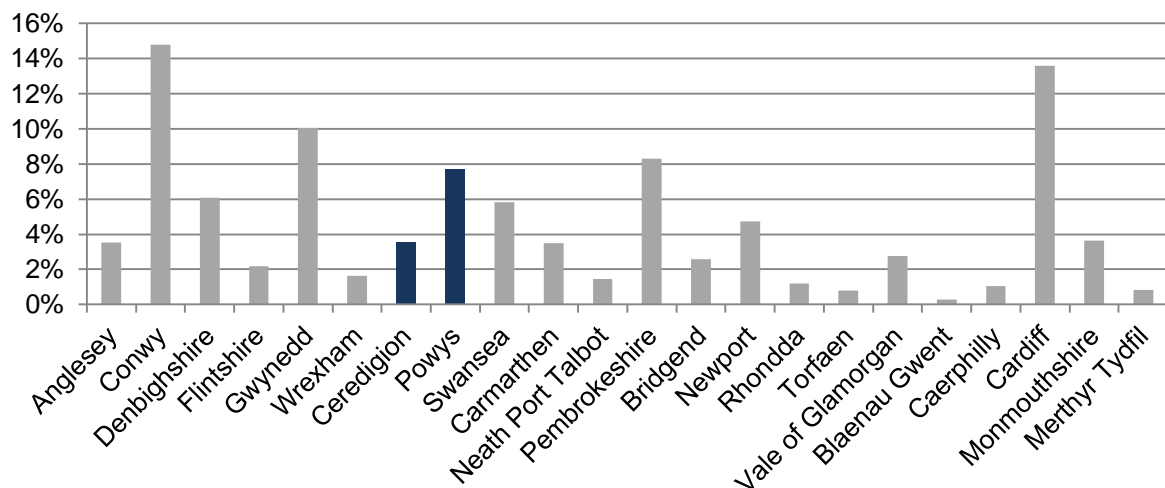


Fig. 6.3: Self-Catering Bedstock

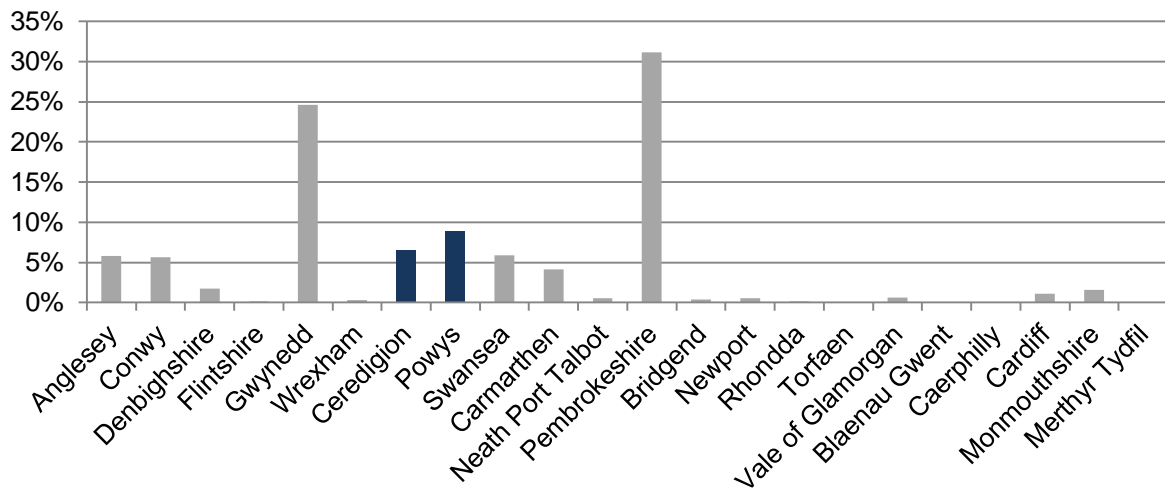
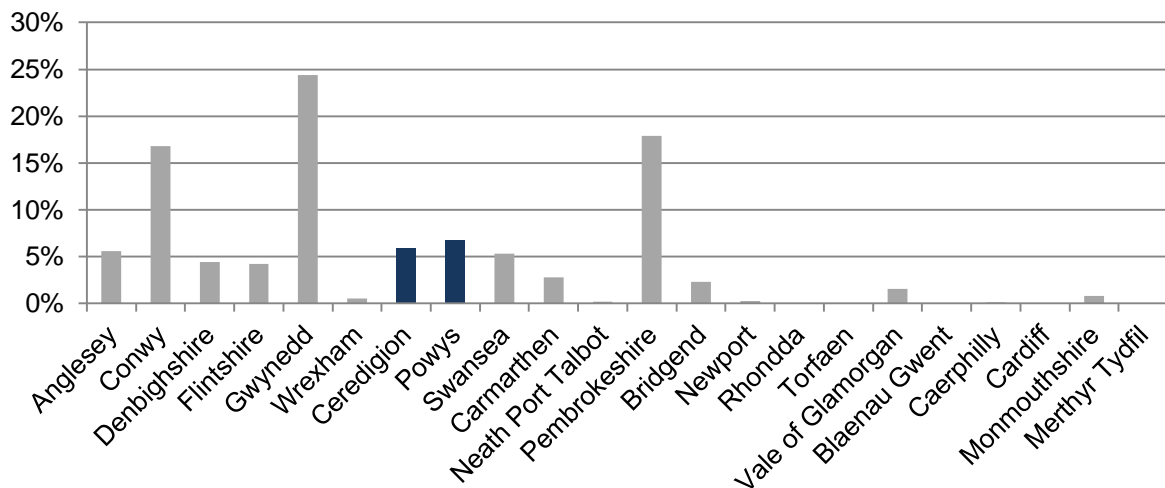


Fig. 6.4: Camping/Caravanning Bedstock



The proportions of different types of bedspaces available in this region are roughly in line with the Wales average, although there is more alternative accommodation available than average. Alternative accommodation however is a very small proportion of all accommodation. Powys has slightly more bedspaces than Ceredigion; otherwise the bedstock available is very similar in both local authorities.