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Regional Tourism Profiles, 2014: North Wales

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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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

North Wales

Trips (Thousands)	2011-2013 Average	2012-2014 Average	% change
Overnight Visits (GB residents)	3,488	3,655	+5%
Overnight Visits (International)	235	232	-2%
Day Visits	23,667	23,333	-1%
Total	27,154	26,988	-1%

Spend (£ millions)	2011-2013 Average	2012-2014 Average	% change
Overnight Visits (GB residents)	582	591	+2%
Overnight Visits (International)	75	76	+1%
Day Visits	722	879	+22%
Total	1,379	1,546	+12%

The North Wales tourism region includes the Isle of Anglesey, Conwy, Denbighshire, Flintshire, Wrexham, and Gwynedd. This area includes the North Wales coast region and Snowdonia as well as the Llŷn Peninsula. The only cities in North Wales are Bangor and Wrexham, and much of this area is classified by the ONS as “Village, Hamlet & Isolated Dwellings”, indicating the predominately rural character of the area. Only Wrexham and parts of the North Wales Coast are classed by the ONS as “Urban”.

North Wales is an area where tourism plays a significant part in the local economy, particularly in coastal areas. This is reflected both in employment and bedstock figures, and also in the fact that 37% of all domestic overnight visits to Wales, and 28% of day visits to Wales, are to this region.

The North-West/ Merseyside region of England provides many visitors to North Wales, with 40% of domestic overnight visits and 29% of day trips to North Wales originating here.

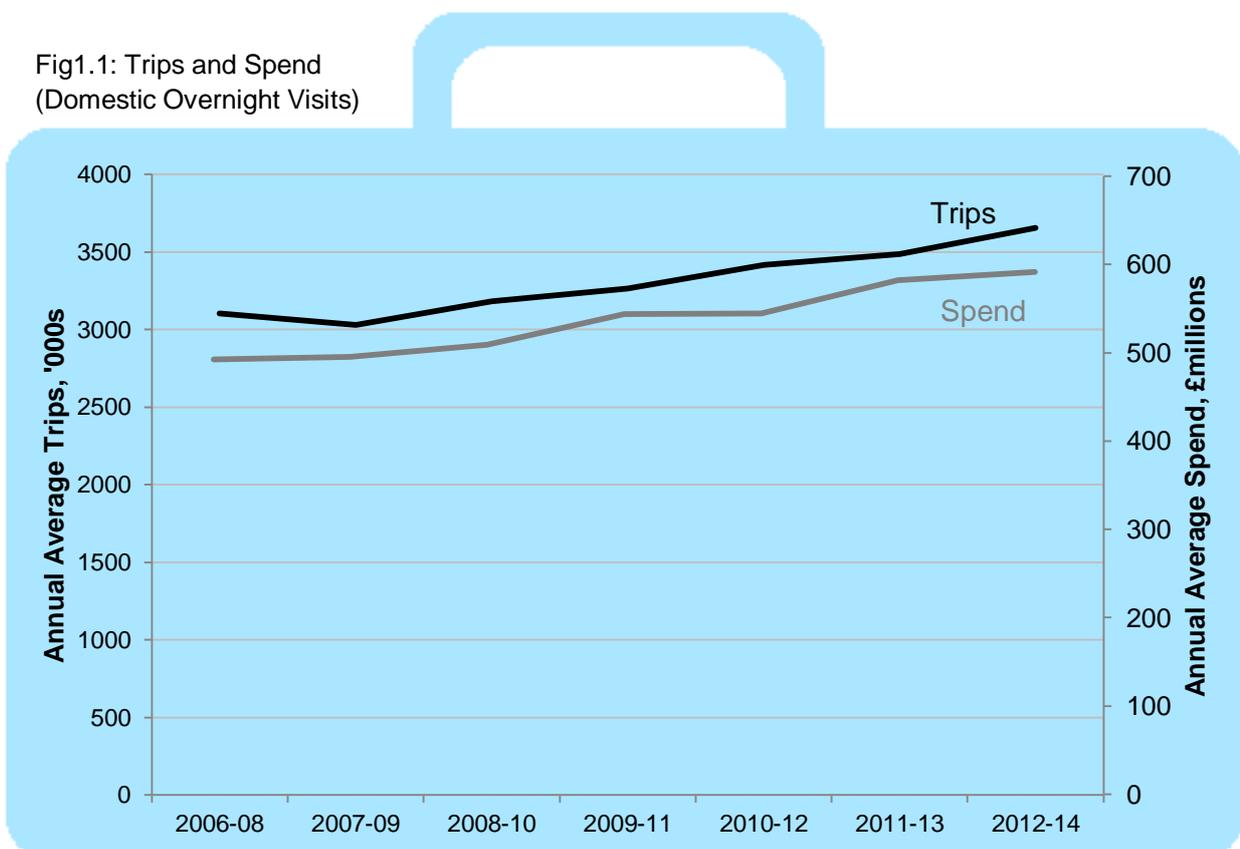
1. Overnight Visits from the UK

Data in this section come from the GB Tourism Survey. Unless otherwise stated, results are for the years 2012-2014. Results in this section use the older definition of the North Wales region, excluding Meirionnydd.

The typical domestic overnight visitor to North Wales is

- visiting on holiday
- probably comes from the North-West of England
- likely to be staying in camping and caravanning accommodation
- probably staying at the seaside
- most likely visiting in the summer holidays, i.e., the months July to September.

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



Since the years 2006-2008, domestic overnight visits to North Wales have been increasing, with the annual average for the years 2012-2014 standing at 3,655,000 trips per year. More overnight trips are made to North Wales than to any other part of Wales, with 37% of overnight trips to Wales in the years 2012-2014 made to North Wales.

Spend on domestic overnight visits to North Wales has also been increasing, from an annual average of £492 million in 2006-2008, to £591 million per year in the years 2012-2014. The amount spent on overnight trips to North Wales in the years 2012-2014 was 36% of all money spent on overnight trips to Wales.

Purpose of Trip

Compared to Wales as a whole, there are higher proportions of holiday trips to North Wales, and consequently lower proportions of other types of trip, such as visits to friends and relatives, and business visits.

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

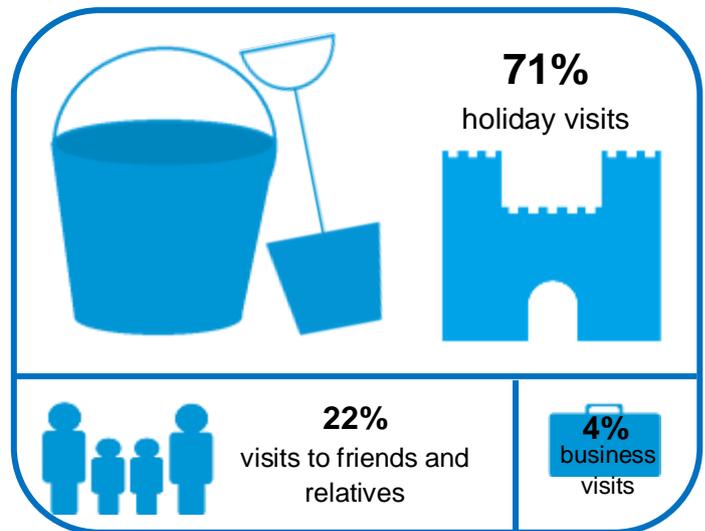


Fig. 1.2: Start Quarter of Visit (Domestic Overnight Visits)

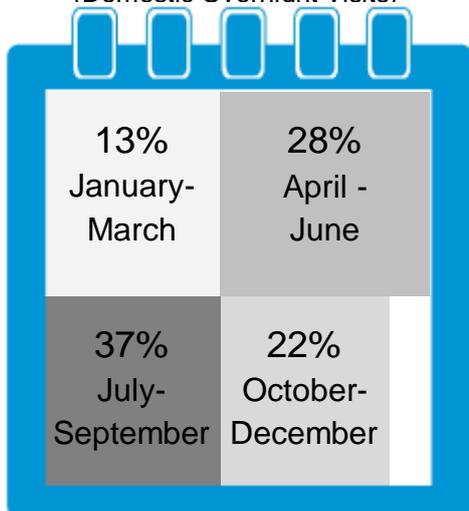
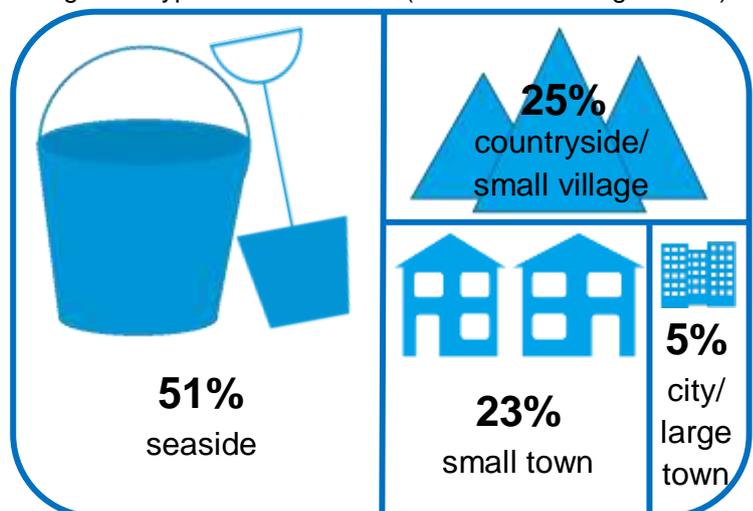


Fig. 1.4: Type of Place Visited (Domestic Overnight Visits)



Type of Place

The seaside is by far the most popular destination type for domestic overnight visitors to North Wales, with half of all such visitors to North Wales having stayed in a seaside location, a higher proportion than for any other part of Wales. In contrast, visits to large towns or cities were much less likely. Given the geography of the area, this should not be surprising, as a large part of the coast of Wales is contained within the North Wales region, but very few cities or large towns. The choosing of the categories is done by respondents and is subjective, so that a respondent who stayed, for example, in Llandudno, might classify it as

either a “seaside” destination, or a “small town”, or indeed a “large town”, depending on what sort of destination they thought it was.

Region of Origin

The North-West/ Merseyside region of England was by far the most likely region of origin for visitors to North Wales. Not only did 4 in 10 of all visitors to North Wales come from this area, but nearly three-quarters (72%) of all visitors to Wales from the North-West/ Merseyside region visited North Wales. Given the strong transport links between North-West England and North Wales, particularly the North Wales coast, this should come as no surprise.

Visitors to Wales from London, the South-West and South-East of England, and Wales itself were less likely to stay in North Wales. In the case of London and the South of England, this is probably at least partially due to the absence of good transport links between these regions and North Wales.

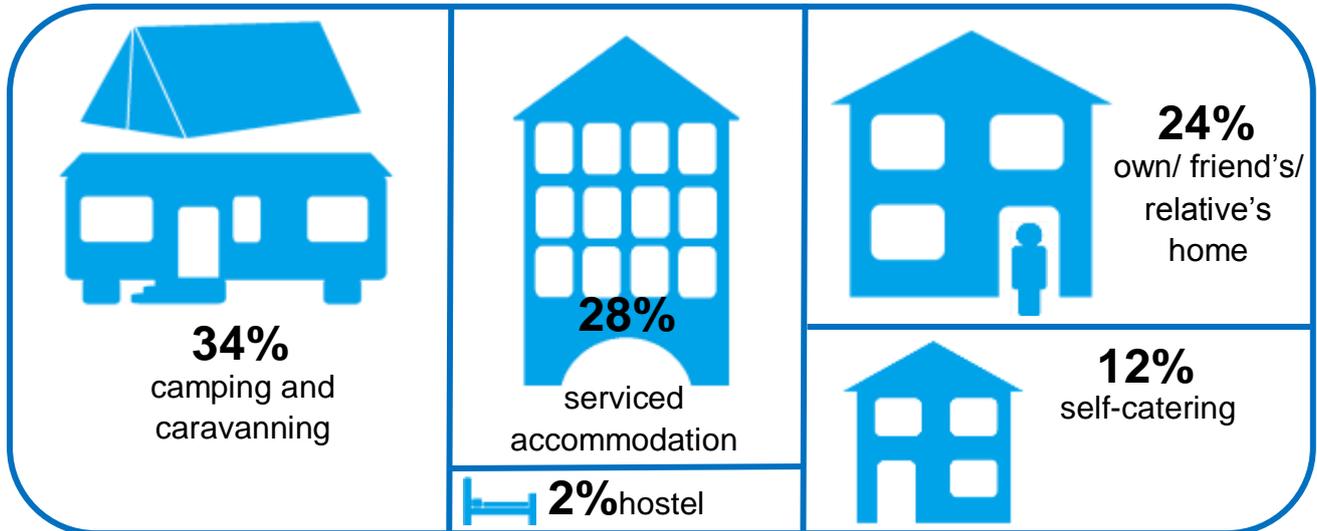
Table 1.1: Region of Origin (Domestic Overnight Visits)

Region of Origin	Annual Average Trips (Thousands)	Proportion of all Trips to North Wales
Scotland	48	1%
Wales	556	15%
North East England	66	2%
North West England / Merseyside	1,486	41%
Yorkshire / Humberside	200	5%
East Midlands	224	6%
West Midlands	529	14%
East of England	139	4%
London	83	2%
South East England	165	5%
South West England	160	4%

Type of Accommodation

Compared to Wales as a whole, visitors to North Wales were slightly more likely to camp or stay in a caravan, and less likely to stay in a home belonging to themselves, a friend or relative. 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

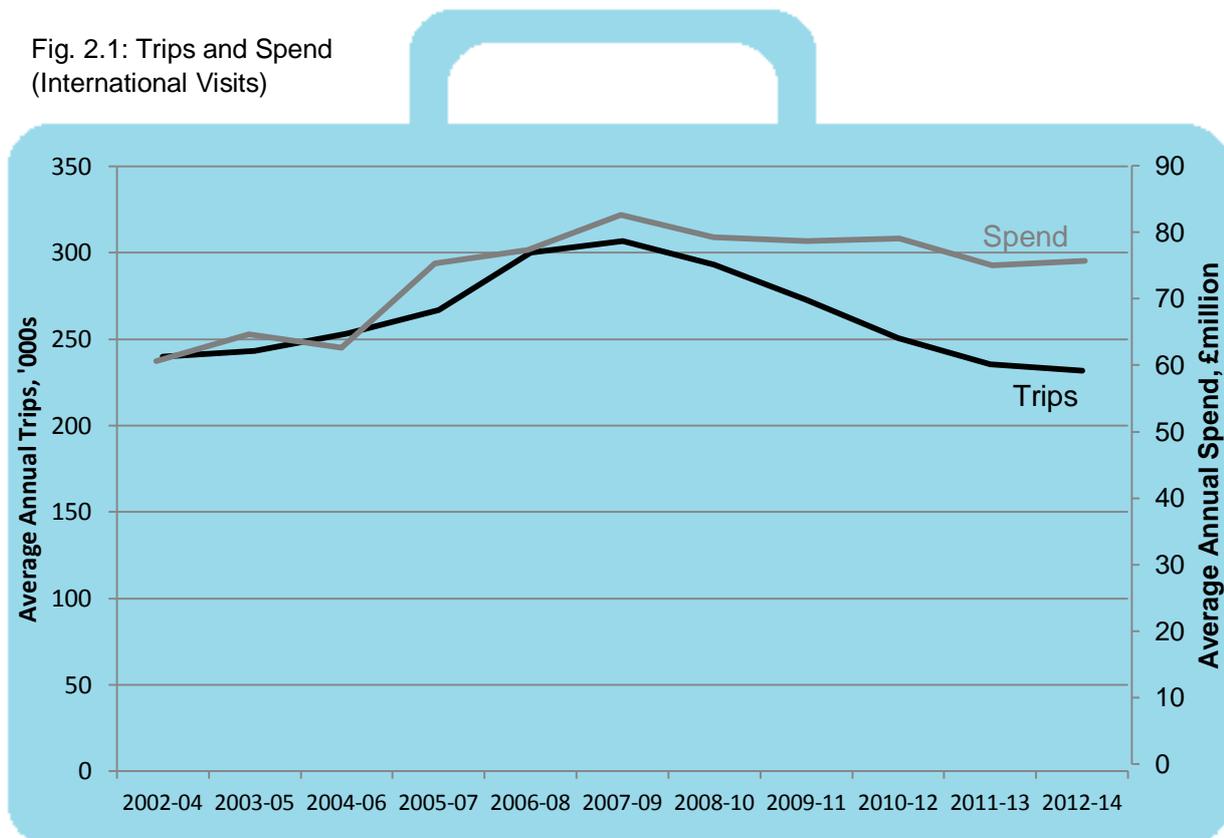
Data in this section come from the International Passenger Survey. Unless otherwise stated, results are for the years 2010-14. Results in this section use the older definition of the North Wales region, excluding Meirionnydd.

A typical international visitor to North Wales is

- visiting on holiday
- most likely to be from the Irish Republic, though also quite likely to be from the USA, Germany or France

Over the period 2002-2014, international visits to North Wales have risen slightly, but then fallen back to approximately 2002-2004 levels, with 240,000 visits per year in the years 2002-2004, and 231,000 visits per year in 2012-2014.

Fig. 2.1: Trips and Spend
(International Visits)

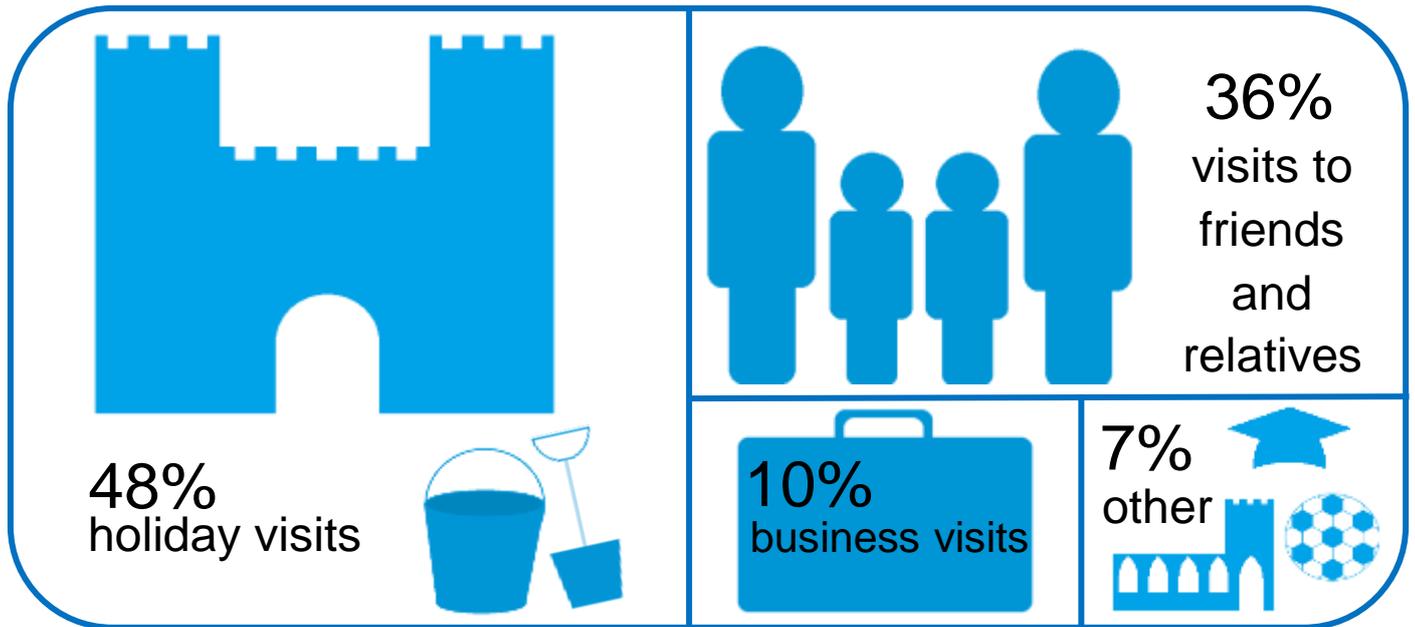


However, spend from international visits shows some increase overall over this period, having risen from an annual average of £61 million for 2002-2004 to £76 million per year in 2012-2014.

Purpose of Visit

Compared to the proportions for Wales overall, there were less international business visitors to North Wales, and more international holiday visitors. The proportions of other types of international visitors were similar to the Wales-wide proportions.

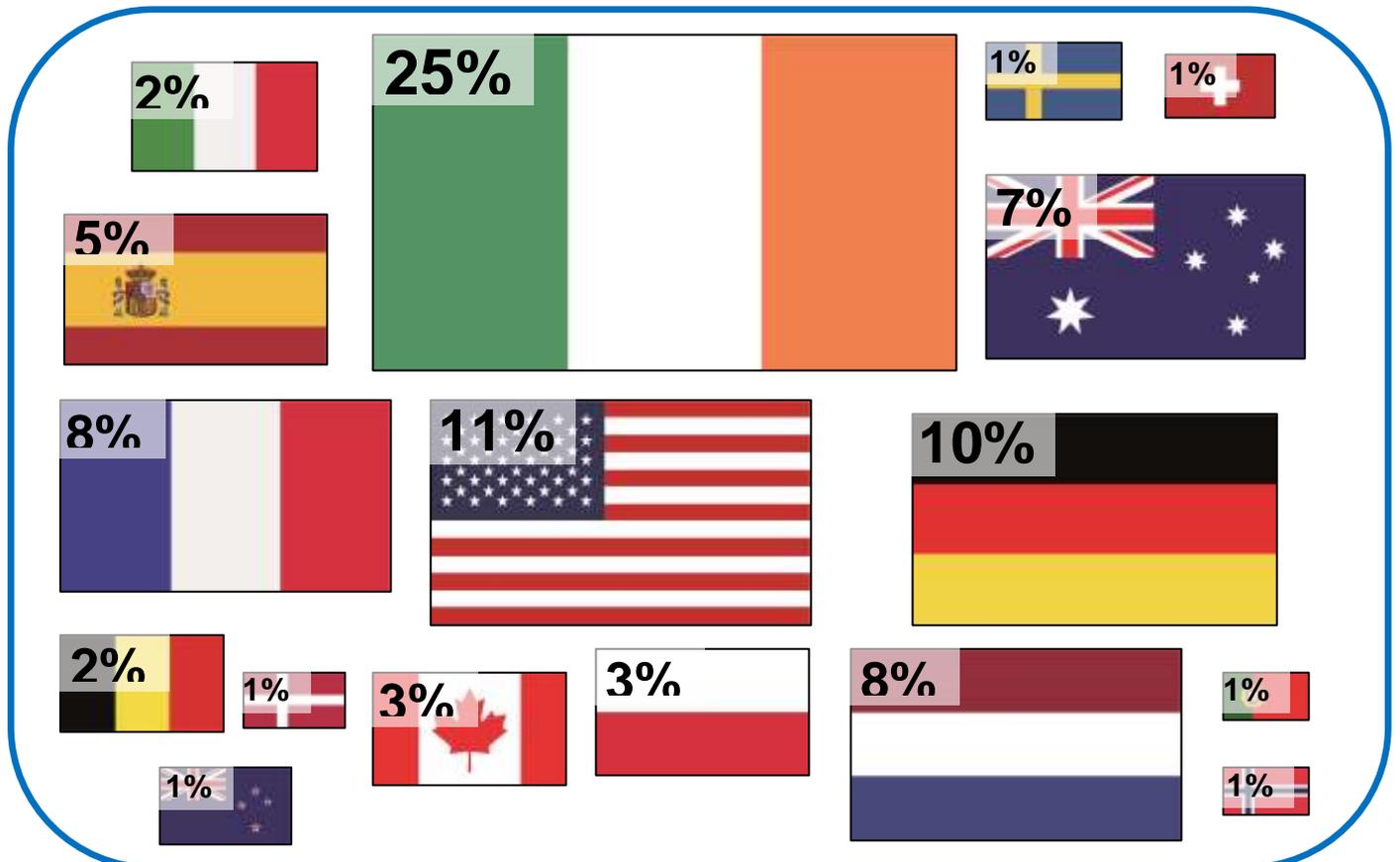
Fig. 2.2: Purpose of Trip (International Visits)



Country of Origin

The most common countries of origin for international visitors to North Wales over the last five years (2010 to 2014) were the Irish Republic, the USA, Germany, France, the Netherlands and Australia, in that order. These countries between them were the place of origin for nearly two-thirds (63%) of all visitors to North Wales. The only notable difference in place of origin for visitors to North Wales, compared to all visitors to Wales is that visitors to North Wales are more likely to have come from the Republic of Ireland. This is probably mainly due to transport links (i.e. the Holyhead ferry), although cultural links between the Irish republic and North Wales may also play a part.

Fig. 2.3: Country of Origin of Visitor (International Visits)



3. Day Visits

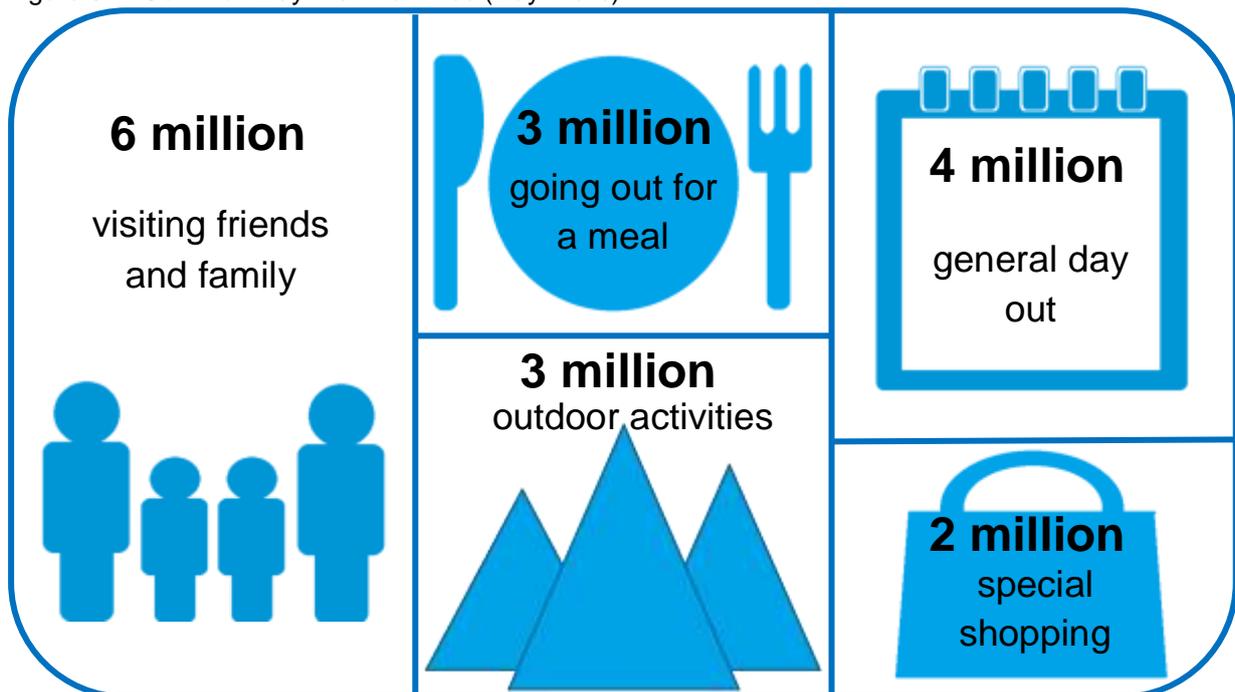
Data in this section come from the GB Day Visits Survey. Unless otherwise stated, results are 2014 only. Results in this section use the older definition of the North Wales region, excluding Meirionnydd.

On average, over the four years 2011-2014, there were 24 million tourism day visits to North Wales. This is 28% of all day visits to Wales. The spend associated with these day visits was £804 million per year, 25% of all tourism day visits spend in Wales.

Activities Undertaken

The most popular activity undertaken on a day visit was “visiting friends and family”.

Figure 3.1: Common Day Visit Activities (Day Visits)

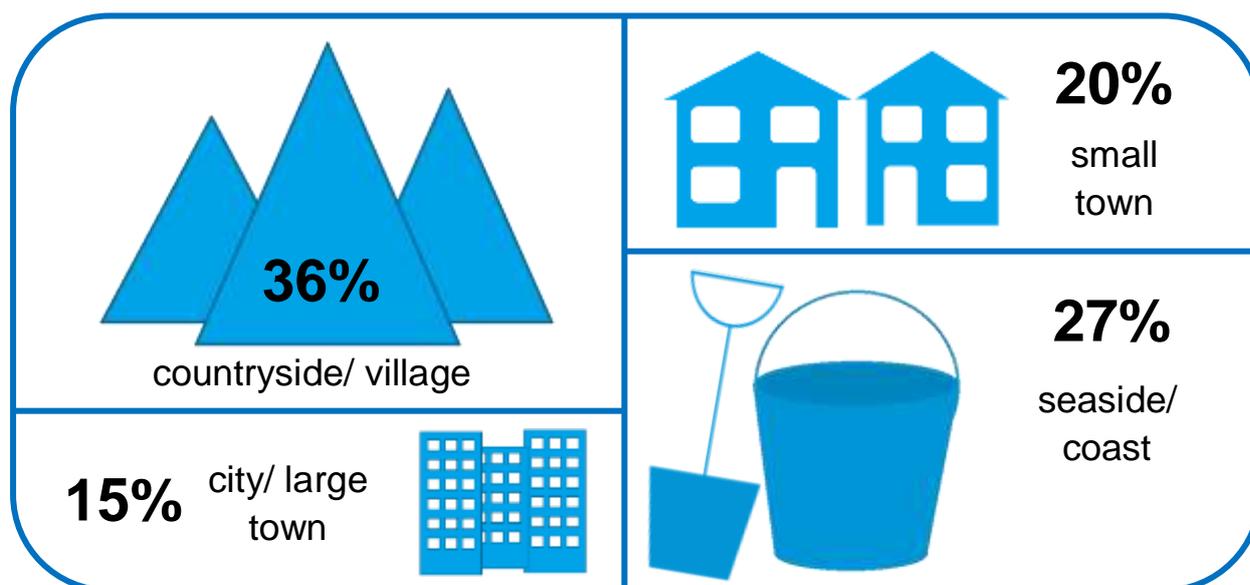


All activities undertaken on at least 2 million visits.

Type of Place

The most common type of place visited on a day visit to North Wales was village/countryside, followed by seaside/coast. A higher percentage of day visitors to North Wales were in these categories than visitors to any other part of Wales. This is not surprising, given the rural character of most of the area. However, it is interesting to contrast these results with those for overnight visits, where the seaside features more strongly, implying that although the seaside is popular for overnight stays, the countryside is more popular for day visits.

Figure 3.2: Types of Place Visited (Day Visits)



Region of Origin

The largest proportion of day visits to North Wales originated from North Wales. However, many also originated in the North-West of England. Between them, these two regions accounted for over two-thirds of all visits to North Wales.

While most regions have high proportions of visitors from the region itself, North Wales is the only region to have a very high proportion of visitors from another single region. This mirrors the results for domestic overnight tourism, where a high proportion of visitors were from the North-West of England.

Table 3.1: Region of Origin (Day Visits)

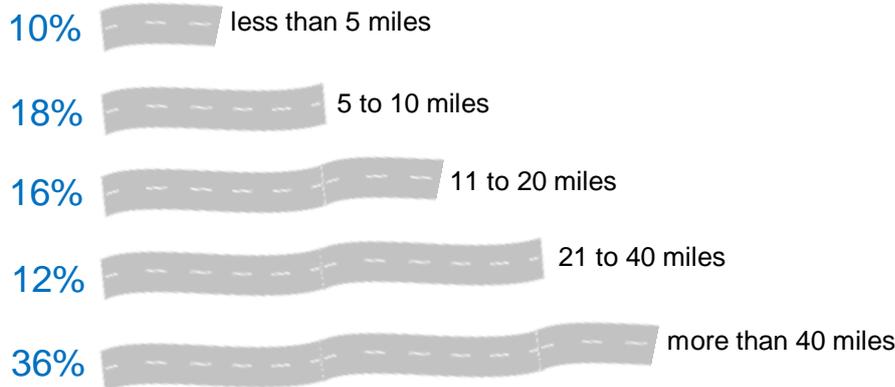
Region of Origin	Number of Visits, Millions
North Wales	10
North West England / Merseyside	7
West Midlands	1
South West England	1

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

Distance Travelled

A large proportion of day visitors to North Wales travelled more than 40 miles, while this region has the lowest proportion of day visitors travelling less than 5 miles. This reflects, to some extent, the geography of an area with fairly widely dispersed towns and villages. It may also reflect the high proportion of visitors from the North-West of England, who are likely to be travelling for longer distances.

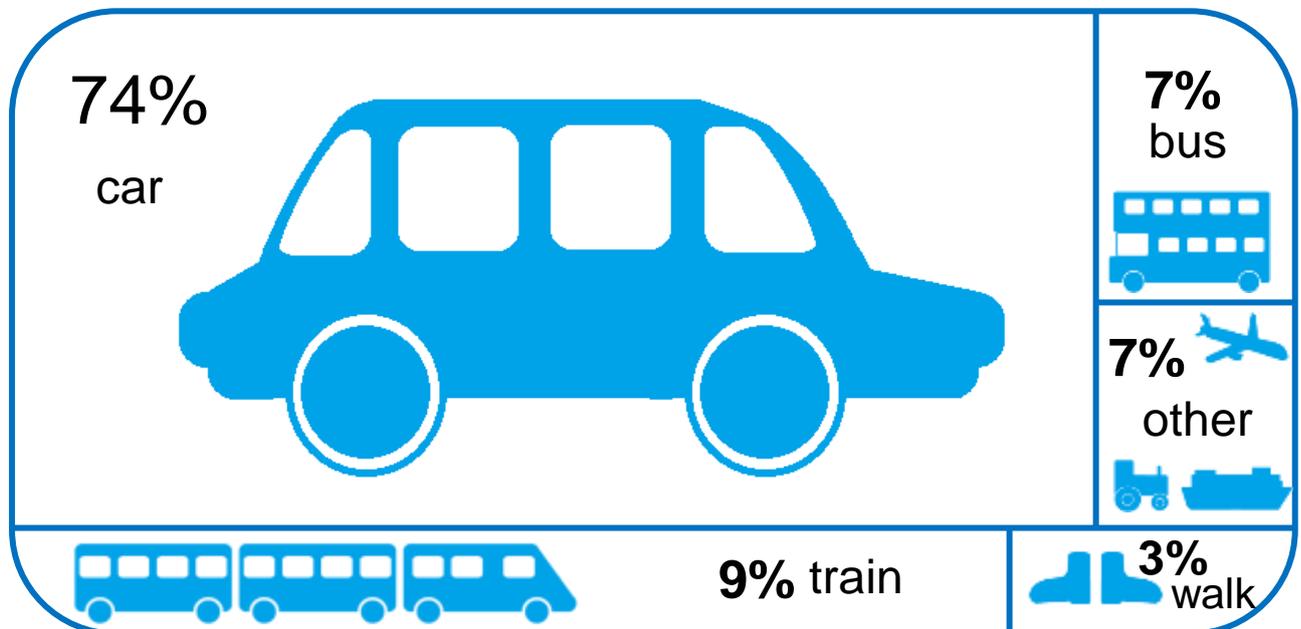
Fig 3.3: Distance travelled (Day Visits)



Transport Used

As is the case for all regions of Wales, the car is the most popular form of transport for day visits.

Fig 3.4: Mode of Transport (Day Visits)

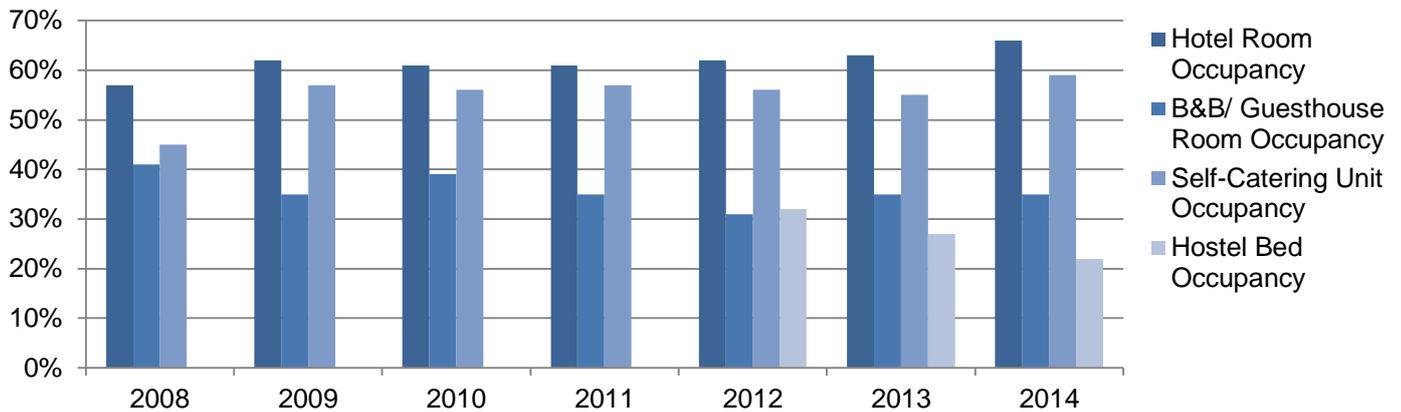


4. Accommodation Occupancy

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

North Wales has the highest levels of self-catering unit occupancy, and of hostel bedspace occupancy, of any Welsh region.

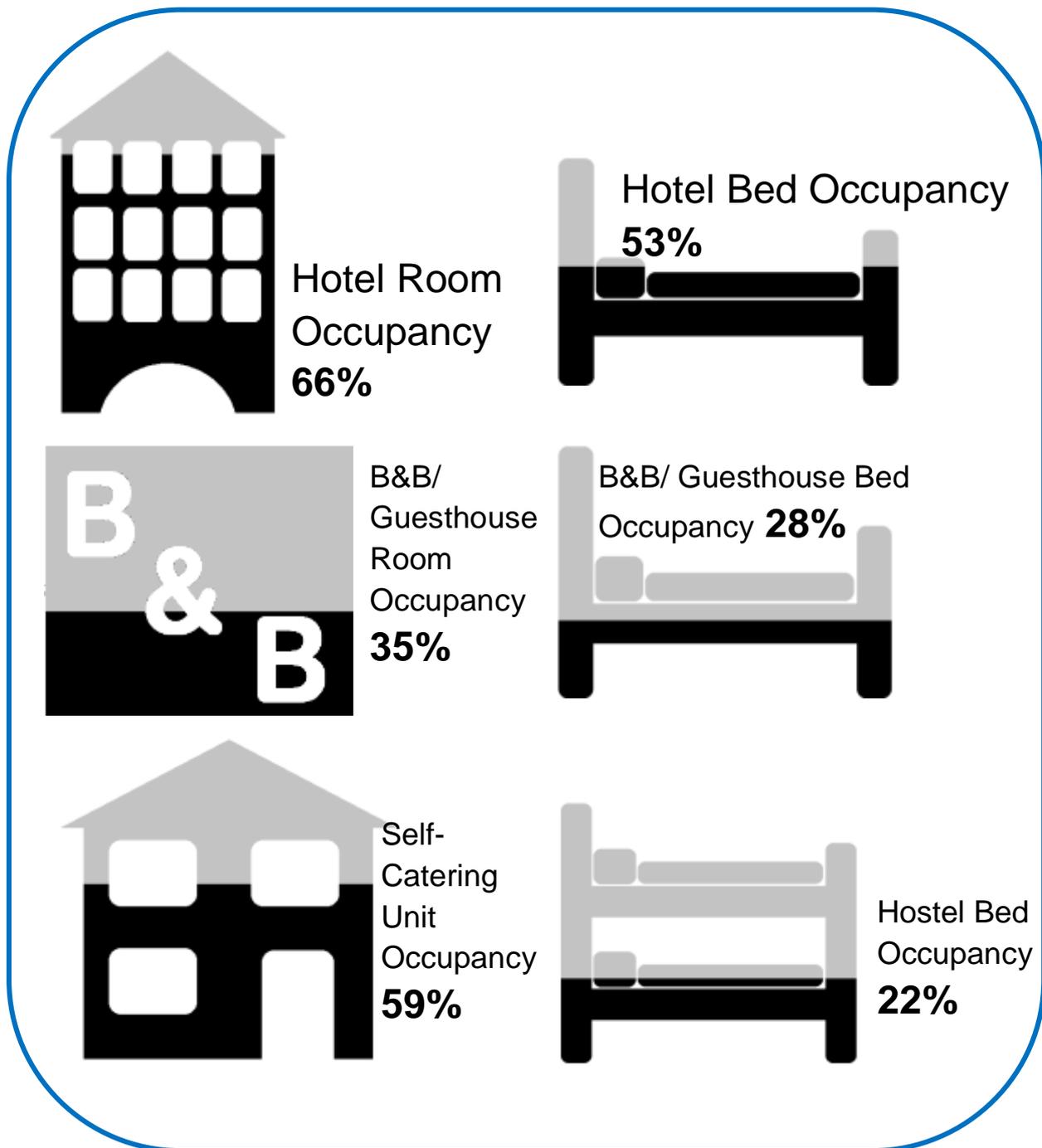
Fig 4.1: Occupancy Rate Over Time



Hotel room occupancy has risen slightly since 2008, as has self-catered unit occupancy, while B&B/Guesthouse room occupancy has fallen. Hostel bed occupancy rates are only available for the last few years, during which time they appear to have fallen.

Despite only average levels of hotel room occupancy, North Wales has the highest hotel bedspace occupancy in Wales. This may well be linked to the higher proportion of holiday visitors to North Wales, who are more likely to be travelling as a couple or family, and the lower proportion of business visitors, who are more likely to be travelling unaccompanied.

Fig 4.2: Occupancy Rate, 2014

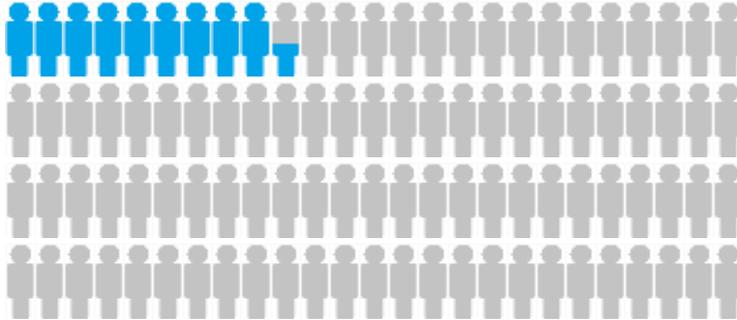


5. Economy

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

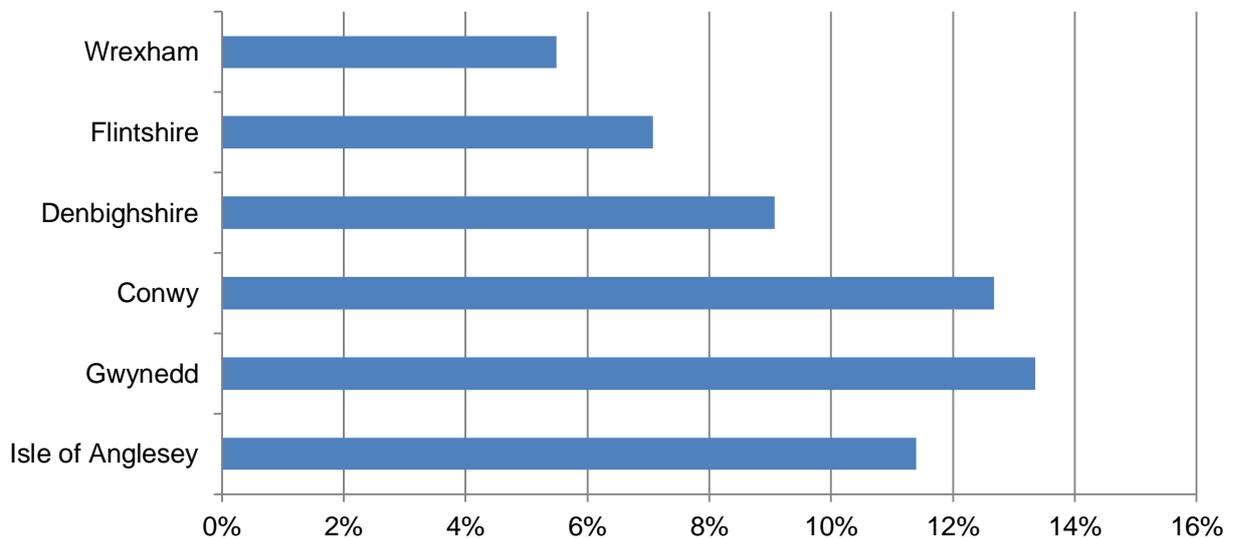
In the North Wales region, there are 27,700 people employed in the tourism sector. This is 9.4% of all jobs in the area, or just more than one in every 11 jobs.

Fig. 5.1: Employment in Tourism



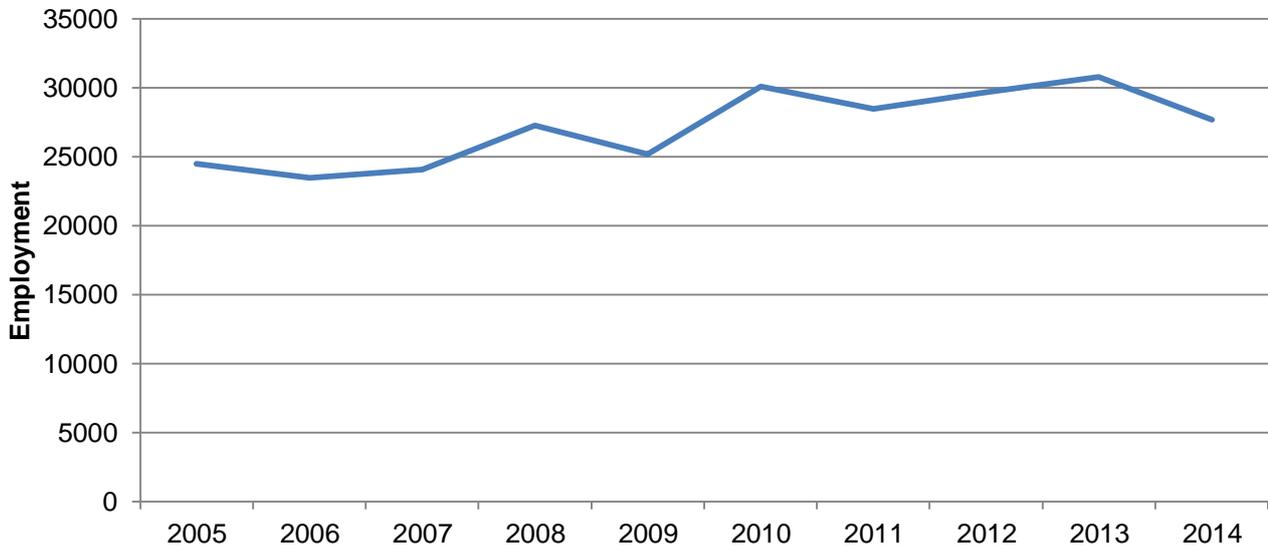
This is slightly more than the proportion of jobs in tourism Wales-wide, which is 9.3%, indicating the importance of tourism to the local economy. The proportion of tourism jobs ranges widely across the local Authorities in North Wales, with the highest being Gwynedd, where 13.4% of all jobs are in the tourism sector, and the lowest Wrexham, with only 5.5% of jobs. In fact, Gwynedd has the highest proportion of tourism jobs in Wales, and Wrexham the lowest. The North Wales region also contains the Local Authority with the second highest proportion of tourism jobs, Conwy, where 12.7% of all jobs are in the tourism sector.

Fig. 5.2: Proportion of Jobs in Tourism by LA



Employment in tourism in the North Wales area has risen over the last ten years, from 24,500 in 2005 to 27,700 in 2014. Employment in tourism has also risen as a proportion of total employment, from 8.2% to 9.4%.

Fig. 5.3: Change in Tourism Employment over Time



6. Bedstock

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

Bedstock in North Wales is dominated by Gwynedd, which provides 22% of tourism bedspaces and 23% of establishments in Wales, more of both than any other Local Authority except Pembrokeshire. There is a slightly higher than average proportion of caravan and camping bedspaces in North Wales, and a correspondingly slightly lower than average proportion of other types of accommodation.

Fig. 6.1: All Tourism Bedspaces

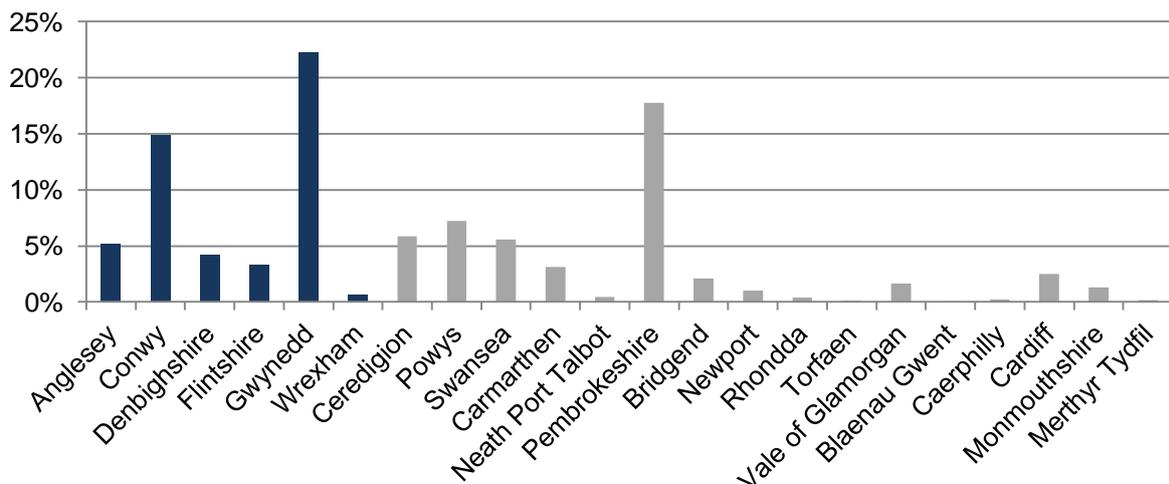


Fig 6.2 Serviced Accommodation Bedspaces

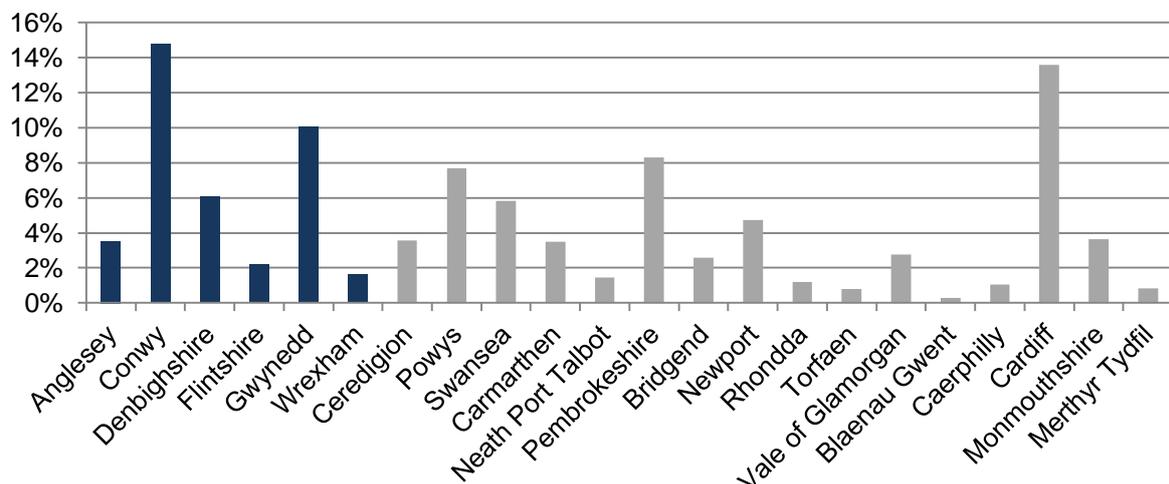


Fig. 6.3: Self-Catering Bedspaces

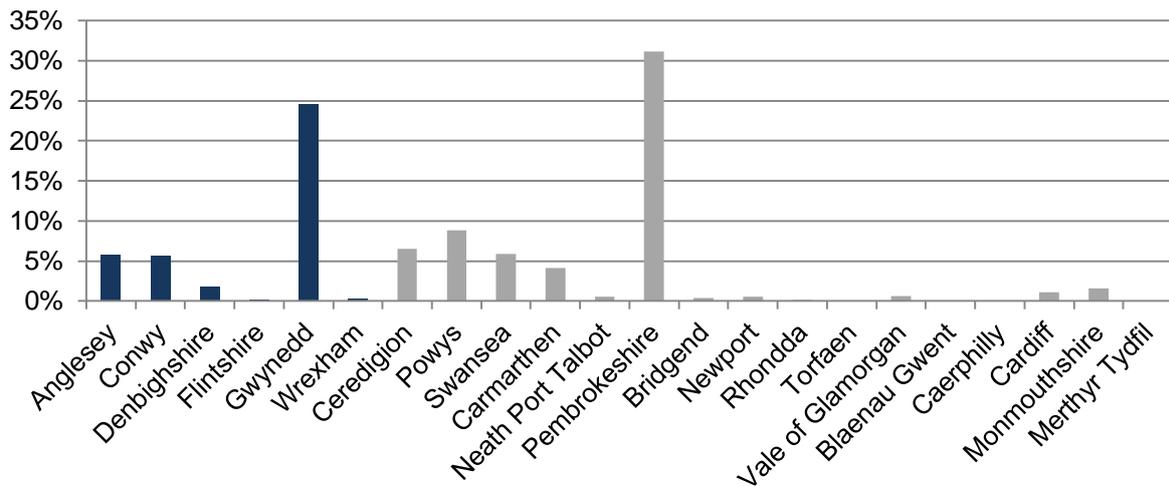
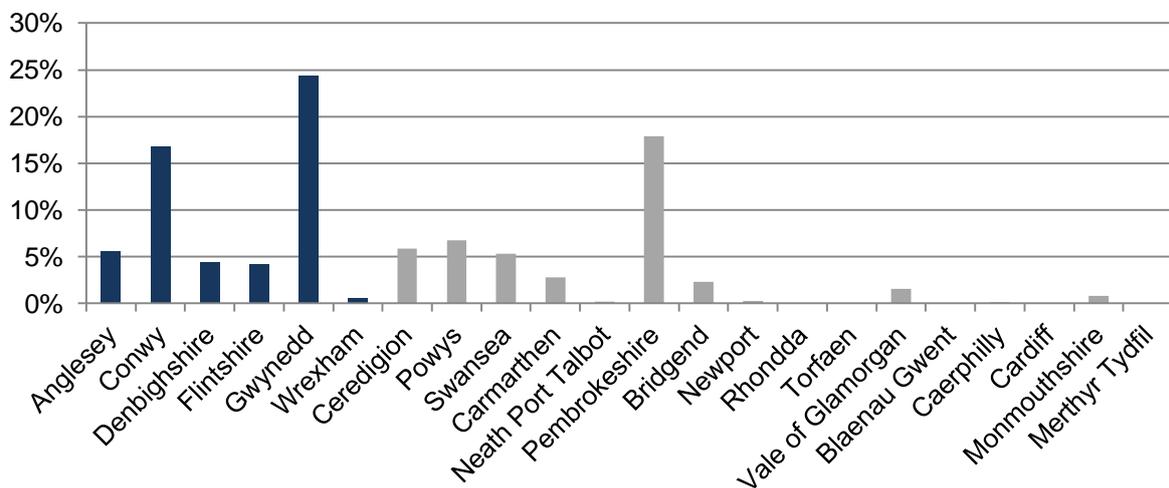


Fig. 6.4 Camping/ Caravanning Bedspaces



North Wales provides 51% of the total tourism bedstock, the majority of it in the form of caravan/ camping accommodation. This includes spaces in static caravans as well as pitches for tents and touring caravans.

Of the Local Authorities in North Wales, Gwynedd has the highest proportion of all types of accommodation except serviced accommodation, while Wrexham has the lowest. This fits with the results observed above in regard to employment, and indicates the relative importance of tourism to the Local Authority areas.

In total, there are 4,736 establishments in North Wales providing tourist accommodation, with a total of 282,798 bedspaces available.