



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

Regional Tourism Profiles, 2014: South West Wales

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Title: Regional Tourism Profiles, 2014

Subtitle: South West 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

South West Wales

Trips (Thousands)	2011-2013 Average	2012-2014 Average	% change
Overnight Visits (GB residents)	2,160	2,089	-3%
Overnight Visits (International)	175	194	+10%
Day Visits	20,667	20,000	-3%
Total	23,002	22,283	-3%

Spend (£ millions)	2011-2013 Average	2012-2014 Average	% change
Overnight Visits (GB residents)	397	390	-2%
Overnight Visits (International)	62	74	+19%
Day Visits	660	670	+2%
Total	1119	1134	+1%

The South West tourism region consists of the Local Authorities of Carmarthenshire, Pembrokeshire, Swansea and Neath Port Talbot, so is made up of a mix of rural and urban regions.

This region contains the Pembrokeshire Coast National Park, and is a popular part of the coast with those wishing to walk the Wales Coast Path.

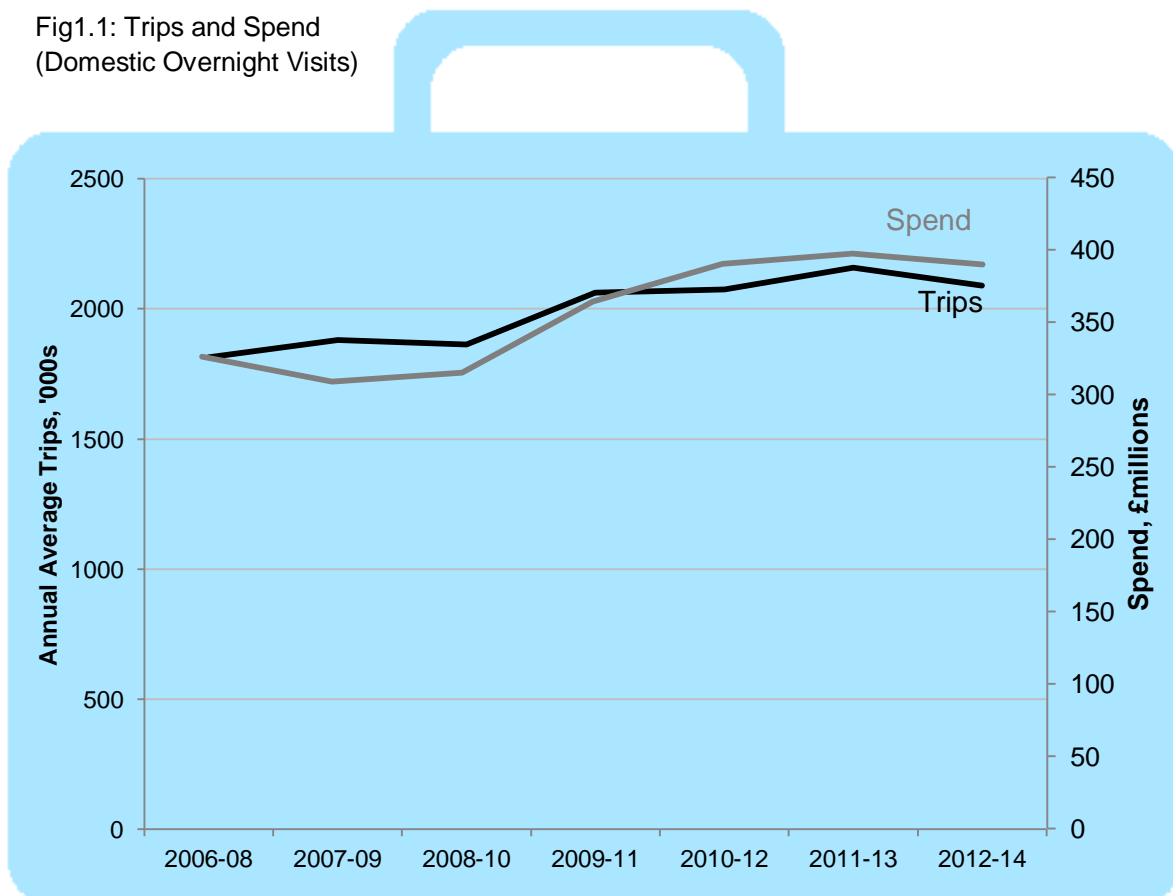
As well as the city of Swansea, and Wales' smallest city of St Davids, this region contains the towns of Haverfordwest, Carmarthen, Pembroke, Milford Haven, and Tenby, among others.

1. Domestic Overnight Visits

Data in this section come from the GB Tourism Survey. Unless otherwise stated, results are for the years 2012-14.

Domestic overnight visits to South West Wales have risen over the last nine years, from an annual average of 1,815,000 in 2006-08 to 2,089,000 per year in 2012-14. Spend has also risen, from £326 million to £390 million per year over the same period.

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

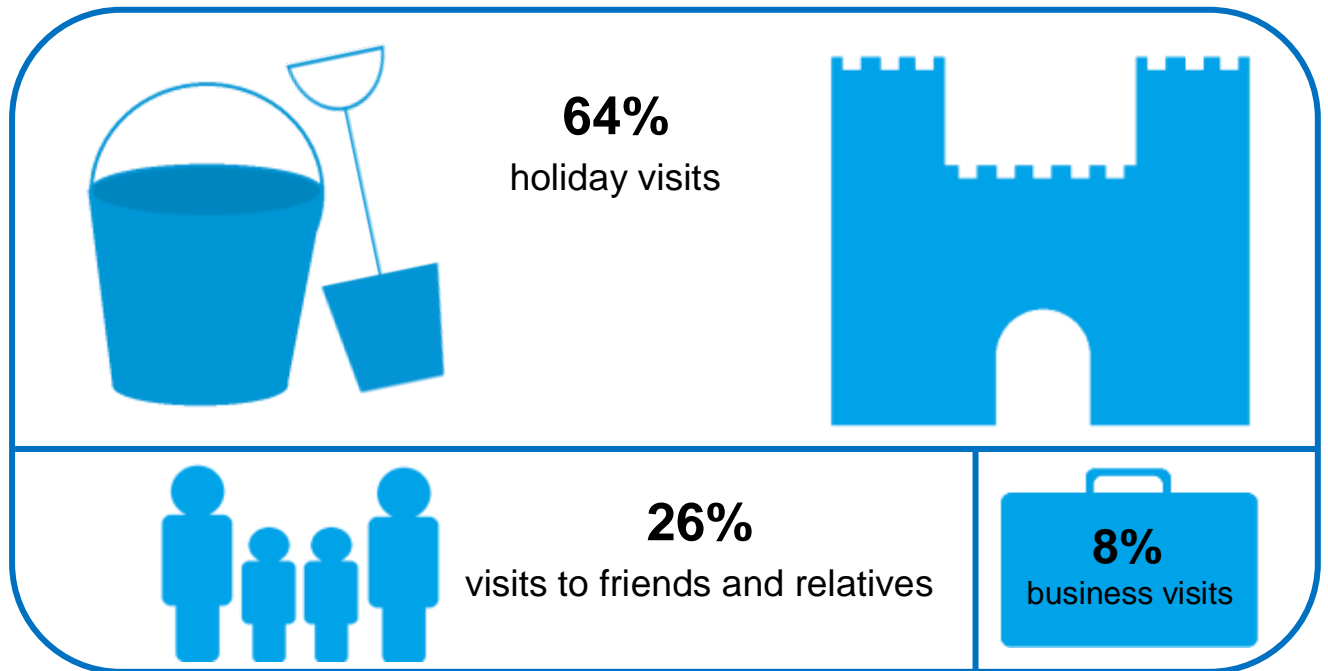


Domestic overnight trips to South West Wales make up just over a fifth of all these trips to Wales, with the spend on these trips accounting for 24% of all such spend.

Purpose of Trip

Most trips to South West Wales are for holiday purposes, with these trips accounting for nearly two-thirds of all trips, a similar proportion to the proportion for Wales as a whole. The proportion of trips which are business trips or visits to friends and family are also broadly similar to the proportions for all trips to Wales.

Fig.1.2: Purpose of Visit (Domestic Overnight Visits)



Seasonality

Visits to South West Wales are slightly more seasonal than visits to all Wales, with the highest proportion of trips in the summer months.

Fig.1.3: Start Quarter of Visit (Domestic Overnight Visits)

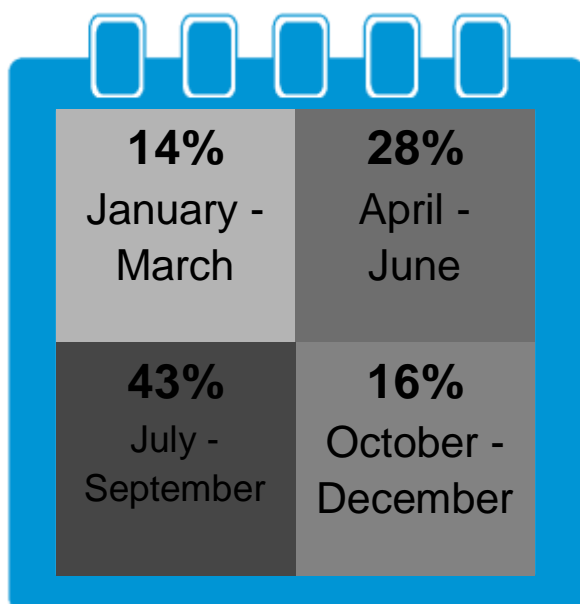
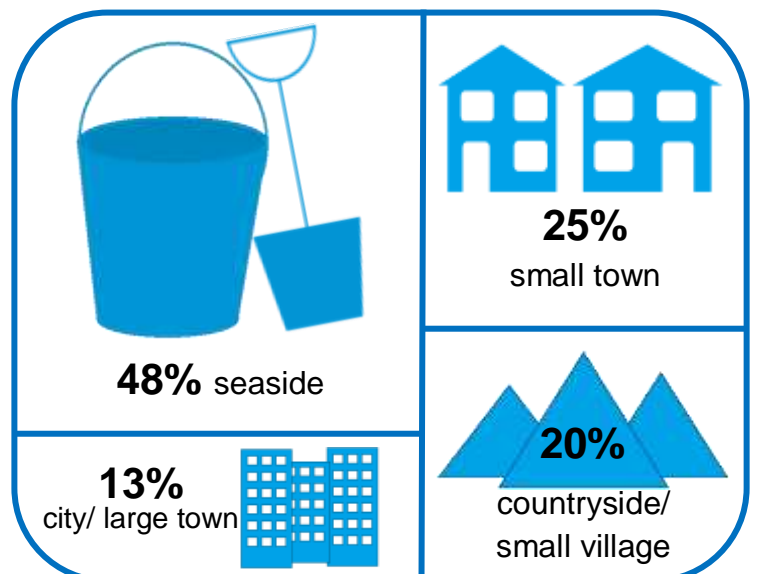


Fig. 1.4: Type of Place Visited (Domestic Overnight Visits)



Type of Place

By far the most common type of place visited on domestic overnight visits to South West Wales is the seaside; this is not surprising for an region with a long and beautiful coastline. This region had a higher than average proportion of visitors to the coastline, though it does also have the second highest proportion of visitors to cities and larger towns out of the Welsh tourism regions.

Origin of Visits

Domestic overnight visitors to this region were particularly likely to originate within Wales. They were also a little more likely to originate in the south of England than visitors to Wales overall. This is not surprising, as this region is more easily accessible from the south of England than is Mid or North Wales.

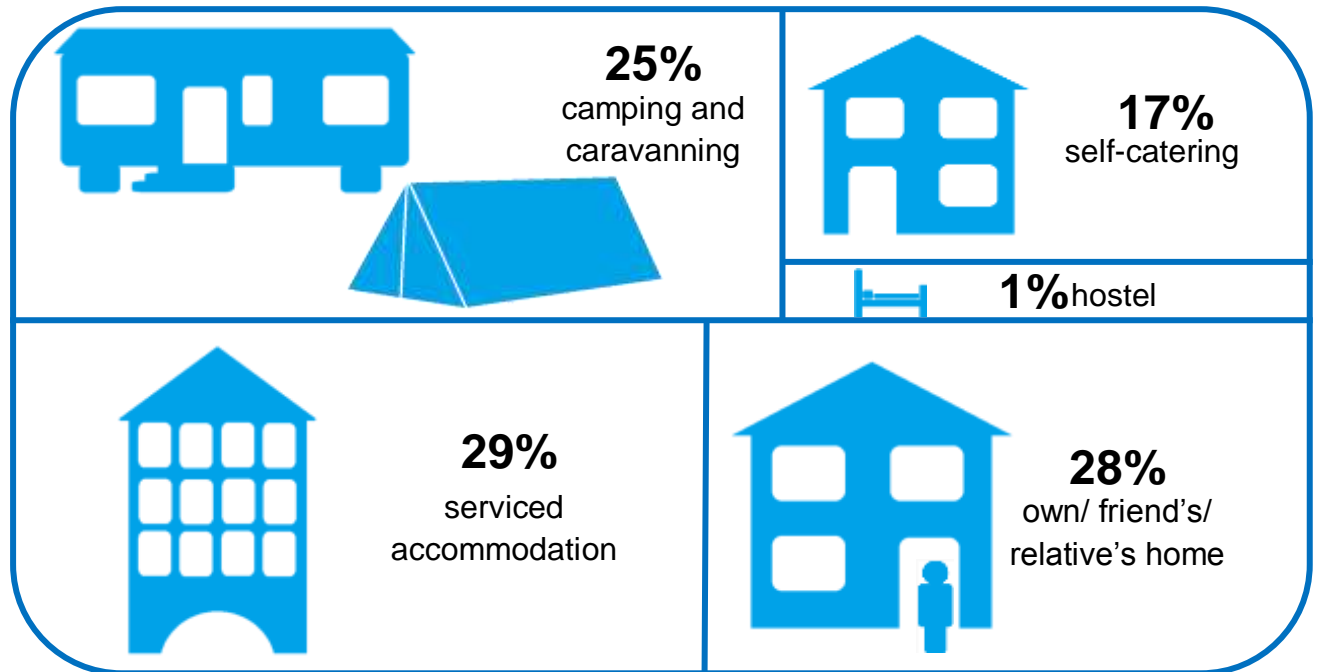
Table 1.1: Region of Origin (Domestic Overnight Visits)

Region of Origin	Annual Average Trips (Thousands)	Proportion of all Trips to South West Wales
Scotland	11	1%
Wales	807	39%
North East England	51	2%
North West England / Merseyside	120	6%
Yorkshire / Humberside	85	4%
East Midlands	124	6%
West Midlands	249	12%
East of England	68	3%
London	139	7%
South East England	203	10%
South West England	233	11%

Type of Accommodation

Visitors to South West Wales are more likely than average to stay in self-catering accommodation, with this region having the highest proportion of visitors who use such accommodation out of all the Welsh regions.

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



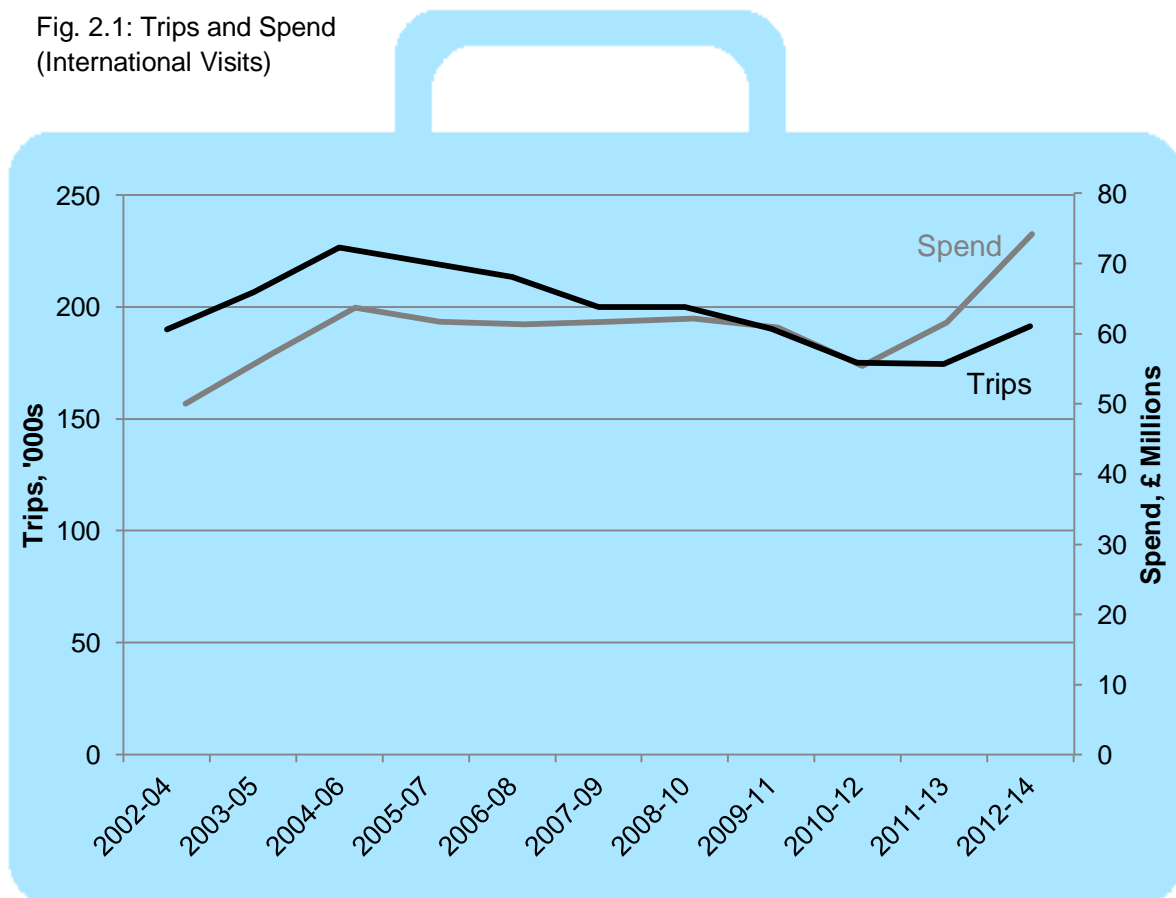
2. International Visits

Data in this section come from the International Passenger Survey. Unless otherwise stated, results are for the years 2010-14.

International visits to South West Wales reached a peak of 227,000 per year in 2004-06, but then fell steadily for some years. However, there has been some recovery recently, and in 2012-14 there were 191,000 visits annually, just edging past the 190,000 per year recorded in 2002-04.

Spend on international visits has risen more significantly, from £50 million per year in 2002-04 to £74 million per year in 2012-14.

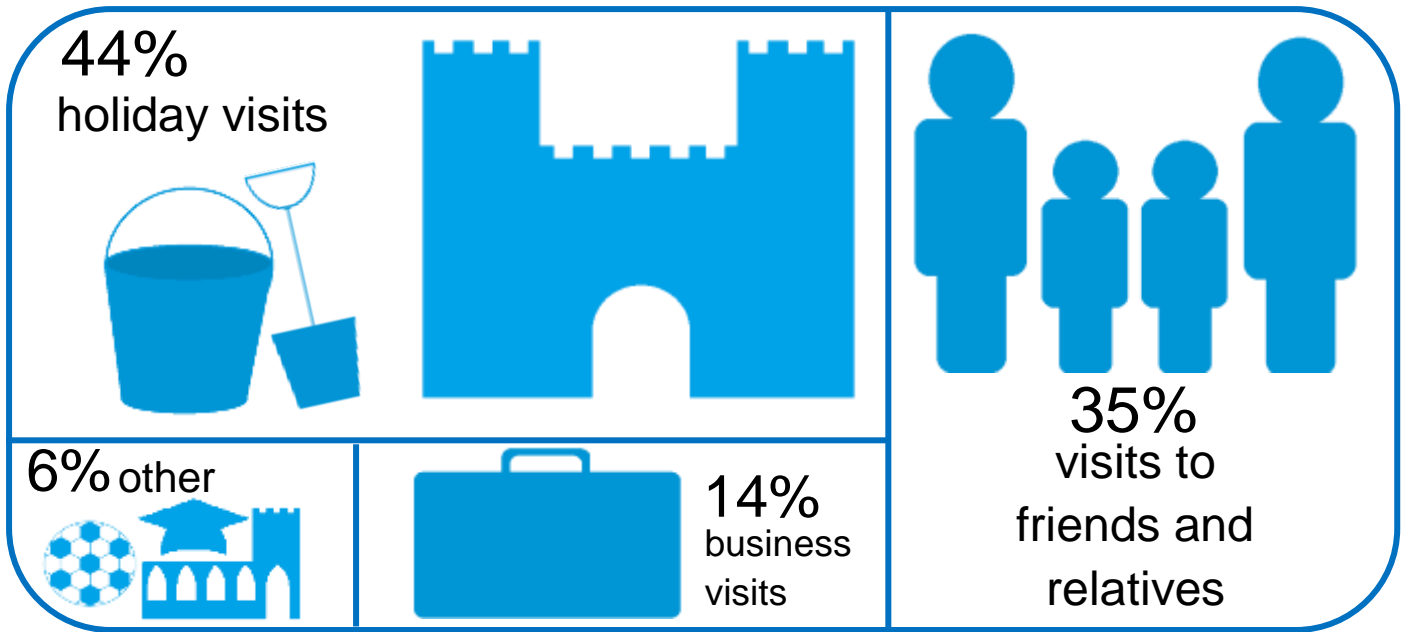
Fig. 2.1: Trips and Spend
(International Visits)



Purpose of Trip

The proportions of international visits for each purpose in South West Wales are very similar to those for Wales as a whole, with around 4 out of ten holidays, just over a third visits to friends and family, and the majority of the remainder business trip.

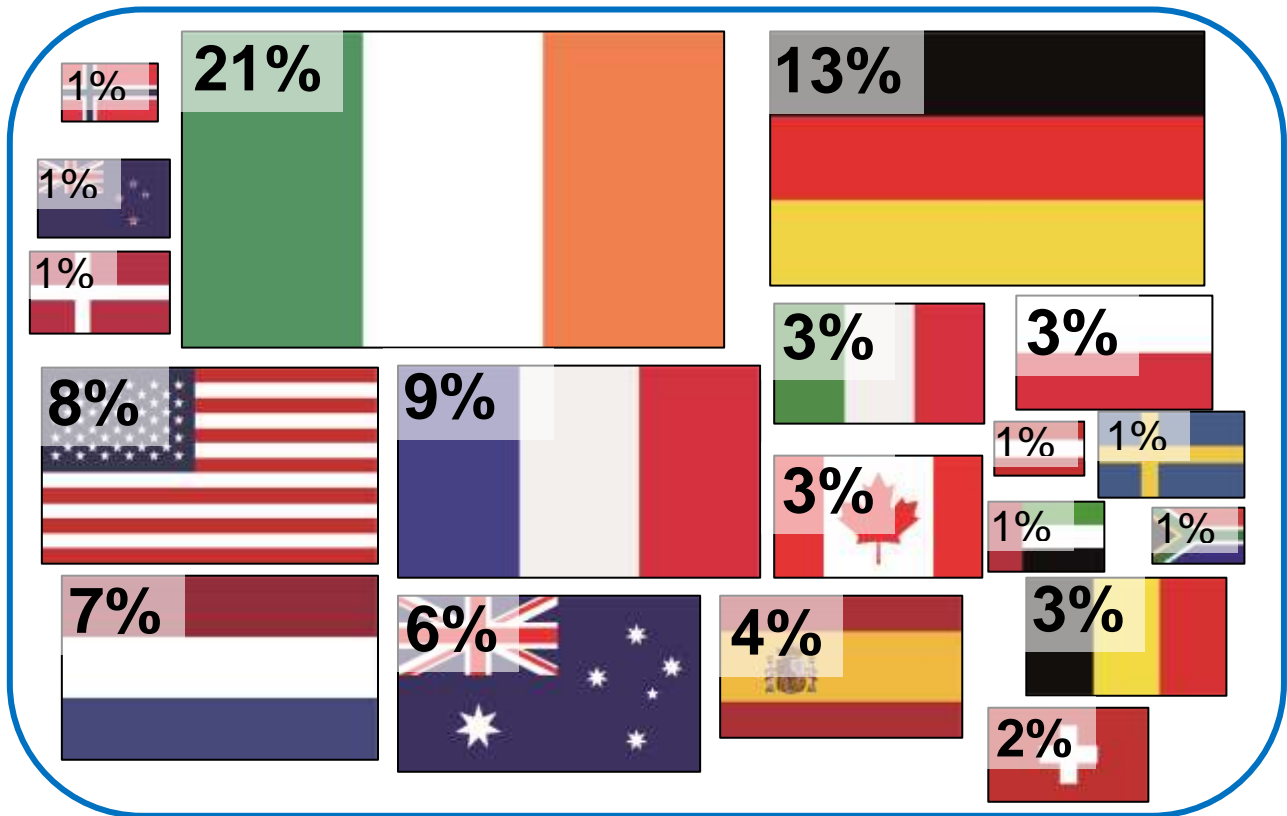
Fig. 2.2: Purpose of Trip (International Visits)



Country of Origin

South West Wales had a higher proportion of visitors from the Republic of Ireland and from Germany than Wales as a whole, and a slightly lower proportion of visitors from the USA. However, there were no large differences between this region and Wales as a whole.

Fig. 2.3: Origin of International Visits



3. Day Visits

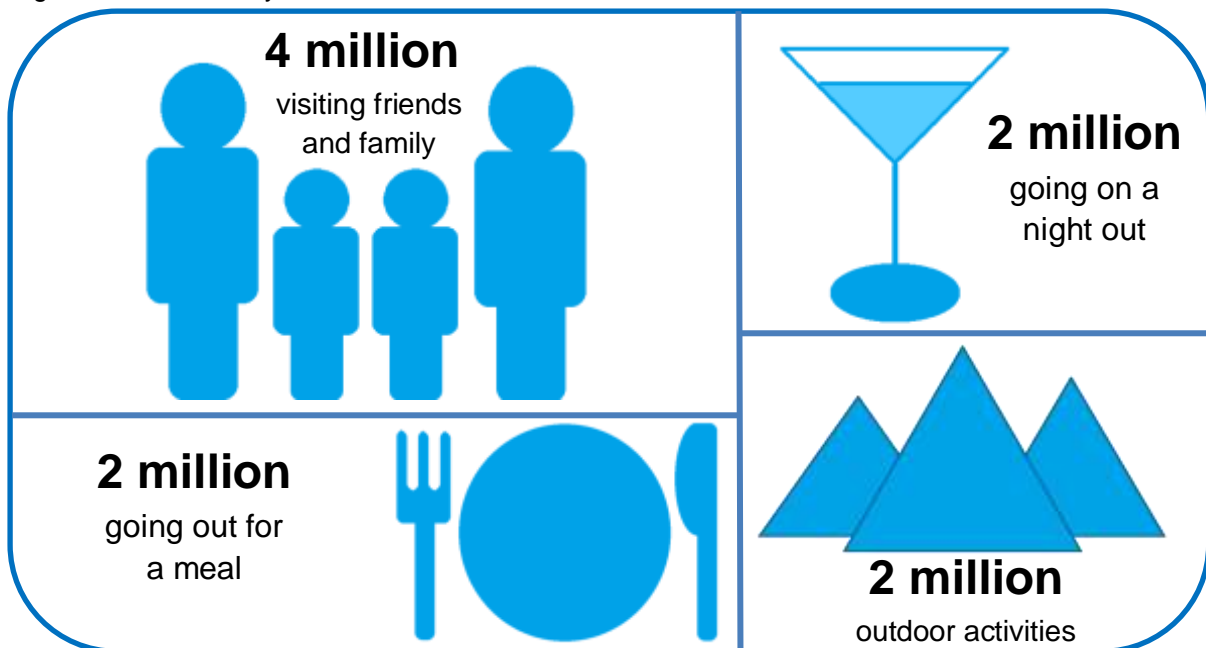
Data in this section come from the GB Day Visits Survey, unless otherwise stated. Unless otherwise stated, results are 2014 only.

On average over the four years 2011-14, there were 20 million day visits per year to South West Wales, with an associated spend of £638 million per year. This is 21% of all day visits to Wales, and 20% of associated spend.

Purpose of Visit

Visits to South West Wales were most likely to be visits to friends and relatives, with 4 million visits in 2014 involving this activity.

Fig. 3.1: Common Day Visit Activities

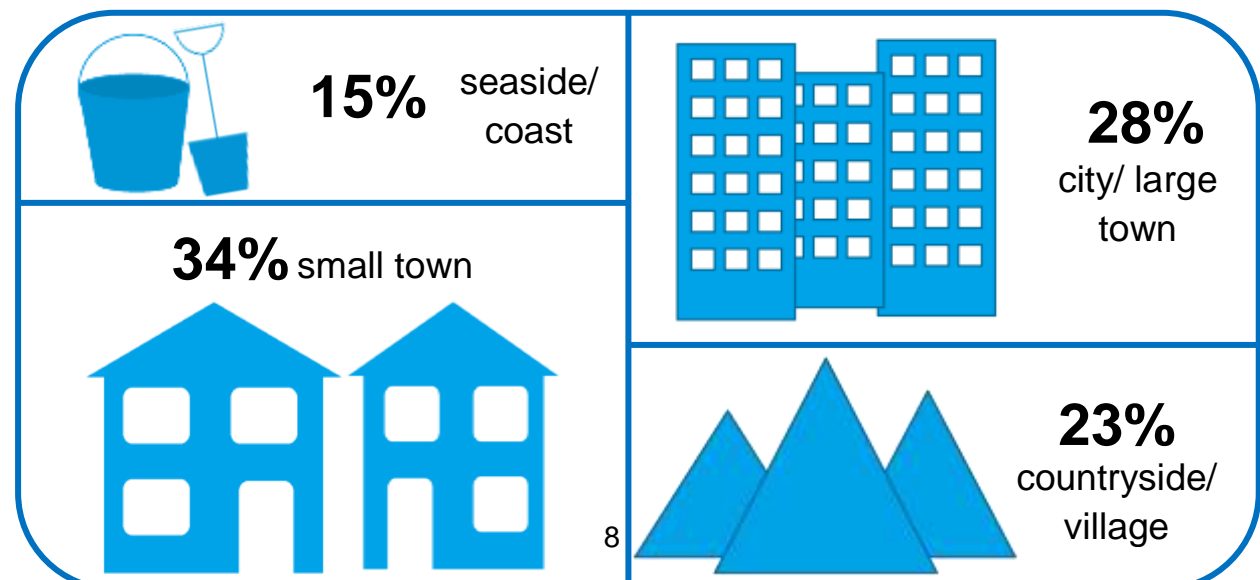


All activities undertaken on at least 2 million visits.

Type of Place

South West Wales had the highest proportion of day visits to a small town out of all the Welsh regions, with this being the most popular destination type for this region. This is not surprising, as there are a number of small towns, particularly on the Pembroke coast, which have a strong appeal to tourists.

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



Region of Origin

The majority of day visits to South West Wales were made by residents of the region, a pattern seen in most Welsh regions.

There were also a number of visits from Mid Wales, South-East Wales, and the south of England. This is unsurprising due to the geography of the region, and the transport links (notably the M4).

Table 3.1: Region of Origin (Day Visits)

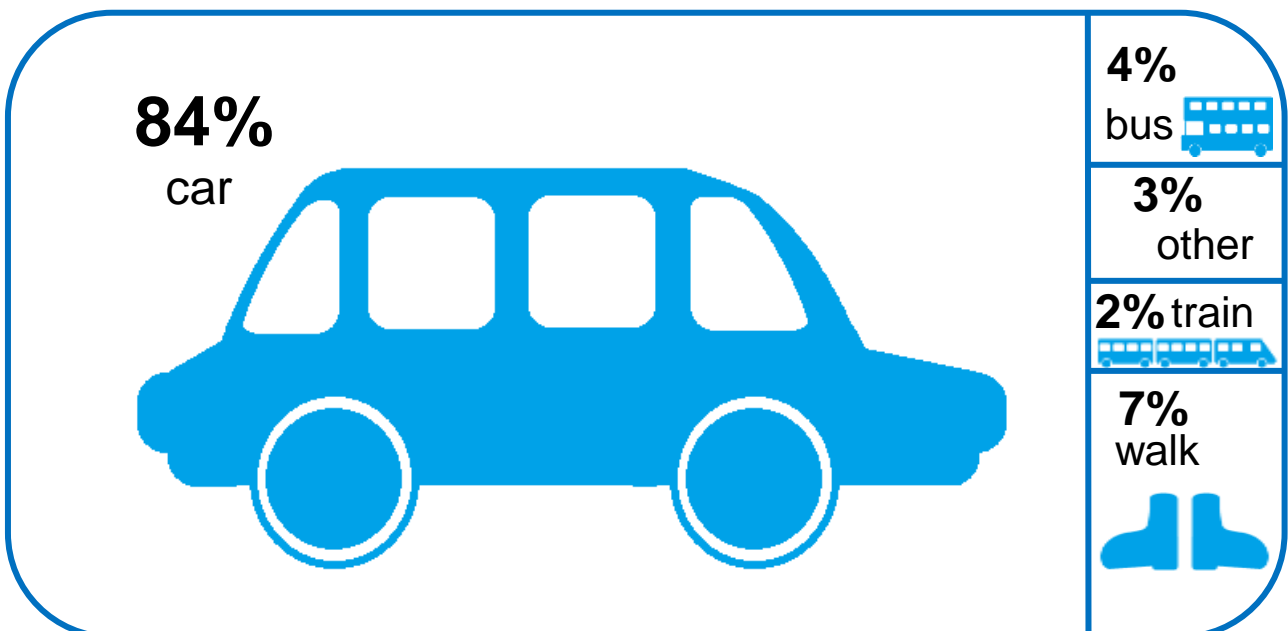
Region of Origin	Number of Visits, Millions
Mid Wales	1
South West Wales	11
South East Wales	2
South East England	1
South West England	1

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

Means of Transport

This region had the highest proportion of day visitors using a car as their main means of transport, and the lowest proportion using the train. This is probably linked to the nature of the transport links between this region and the rest of Wales (and to England), which are predominantly road rather than rail links.

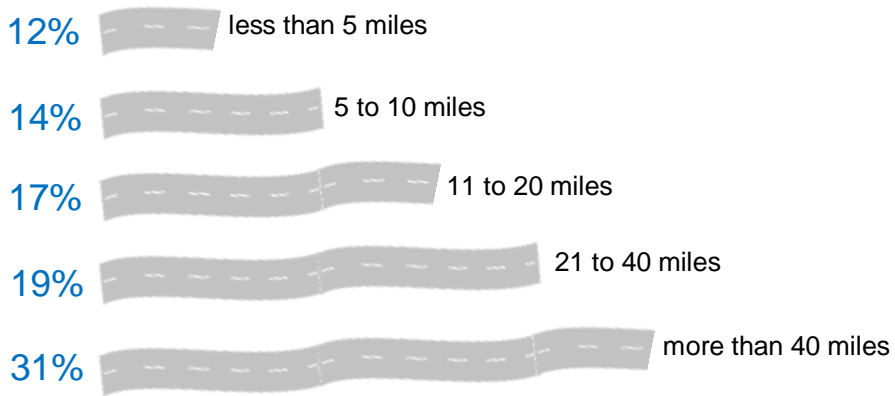
Fig 3.3: Mode of Transport (Day Visits)



Distance Travelled

South West Wales had the highest proportion of day visitors travelling moderate distances, i.e. between 10 and 40 miles. This might be related to the character of the region; neither very sparsely populated like Mid Wales, nor yet predominately urban like South-East Wales.

Fig. 3.4: Distance Travelled (Day Visits)

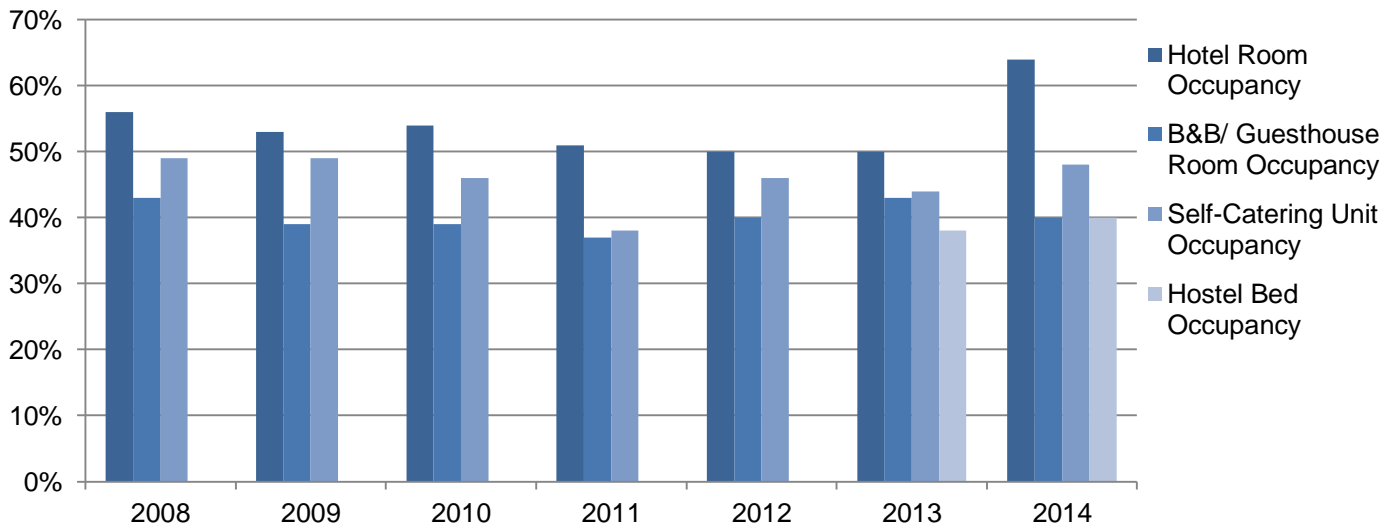


4. Accommodation Occupancy

Data in this section come from the Wales Tourism Accommodation Occupancy Survey.

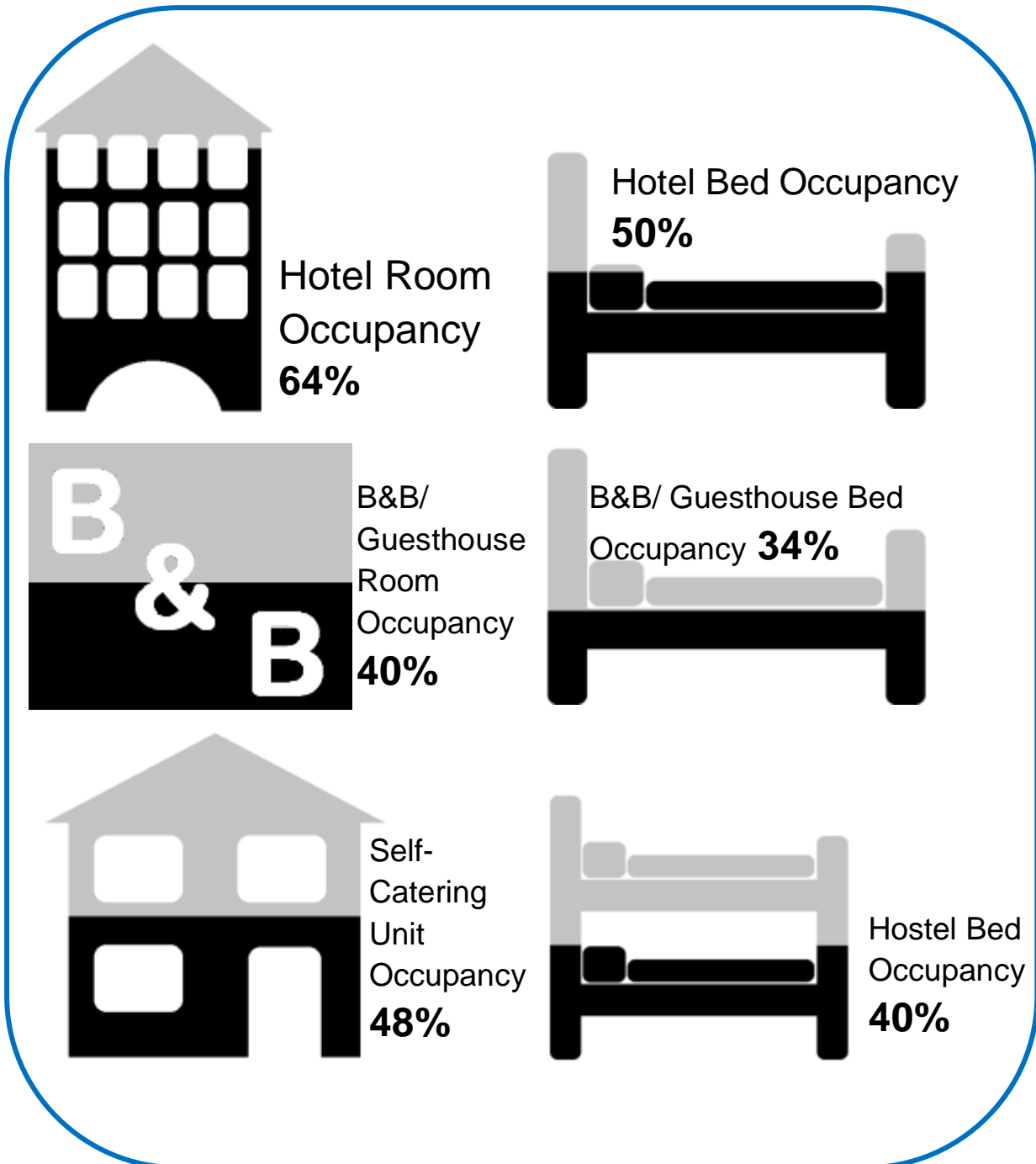
South West Wales has the highest occupancy rates for B&Bs/ Guesthouses of all the Welsh regions. Hostel bed occupancy rates are rather lower than average, but occupancy rates for hotels and self-catering accommodation are close to the Wales average.

Fig. 4.1: Accommodation Occupancy



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 decrease up to about 2011-12 and then increase.

Fig. 4.2 Occupancy Rate, 2014

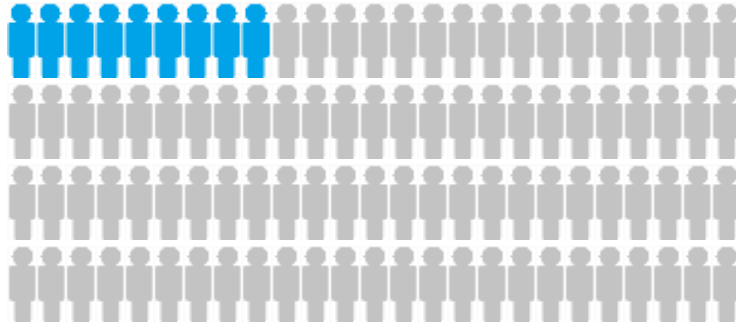


5. Employment

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

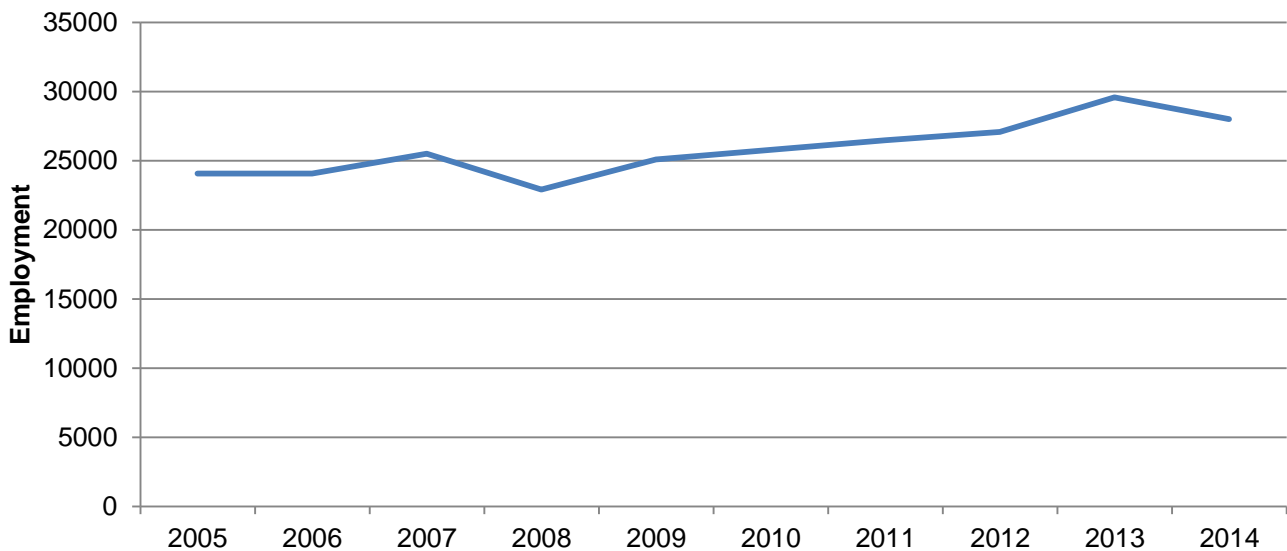
South West Wales has the lowest proportion of jobs in the tourism industry of all the Welsh regions, though not by much. Tourism is clearly still important to this region, with 9% of employment in the region in the tourism industry. The proportion of employment which is in the tourism industry varies depending on the region, with 11% of all employment in Pembrokeshire being in tourism, but only 6% in Carmarthenshire.

Fig. 5.1: Employment in Tourism



Both the percentage of employment which is in the tourism industry has increased since 2005, as has the total amount of employment in this industry, from 24,100 in 2005 to 2,800 in 2014.

Fig. 5.2: Employment in Tourism (Change Over Time)



6. Bedstock

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

With 33% of all accommodation establishments, and 27% of bedspaces, South West Wales has more tourism accommodation available than any other region except North Wales. Two-thirds of this is in Pembrokeshire, so Pembrokeshire alone provides 18% of all tourism bedspaces.

There is a higher proportion of self-catered accommodation in this region than average, particularly in Pembrokeshire. Pembrokeshire contains 31% of all self-catered accommodation bedspaces, more than any other Local Authority in Wales.

This region overall has a lower proportion of serviced bedspaces than the Wales average, but this is driven entirely by Pembrokeshire, with all the other Local Authorities in this region actually having higher levels of serviced accommodation than average available, particularly Neath Port Talbot, where almost half of all bedspaces available are serviced (though the numbers involved are quite small).

Fig. 6.1: All Tourism Bedstock

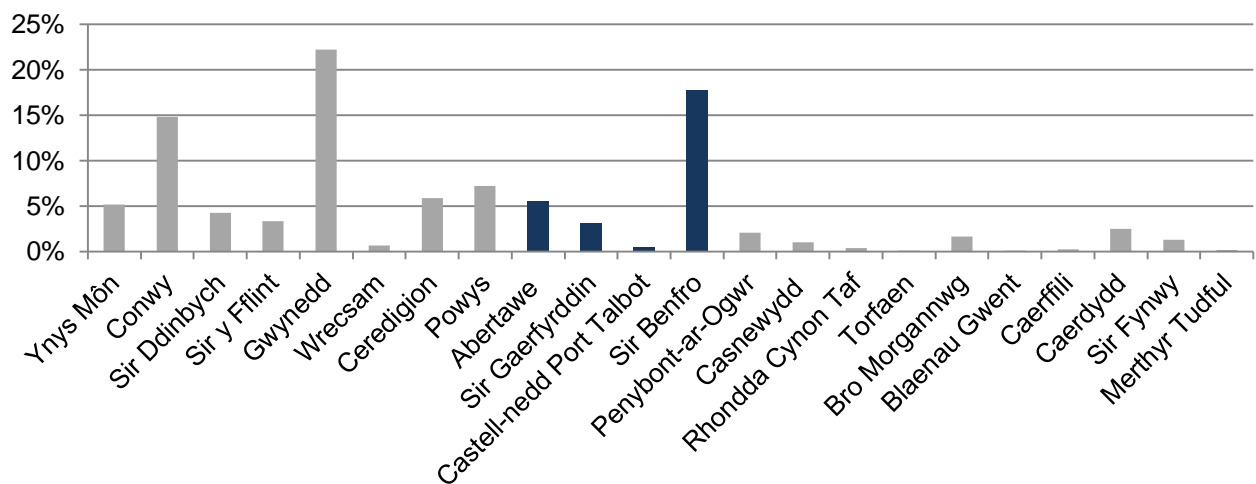
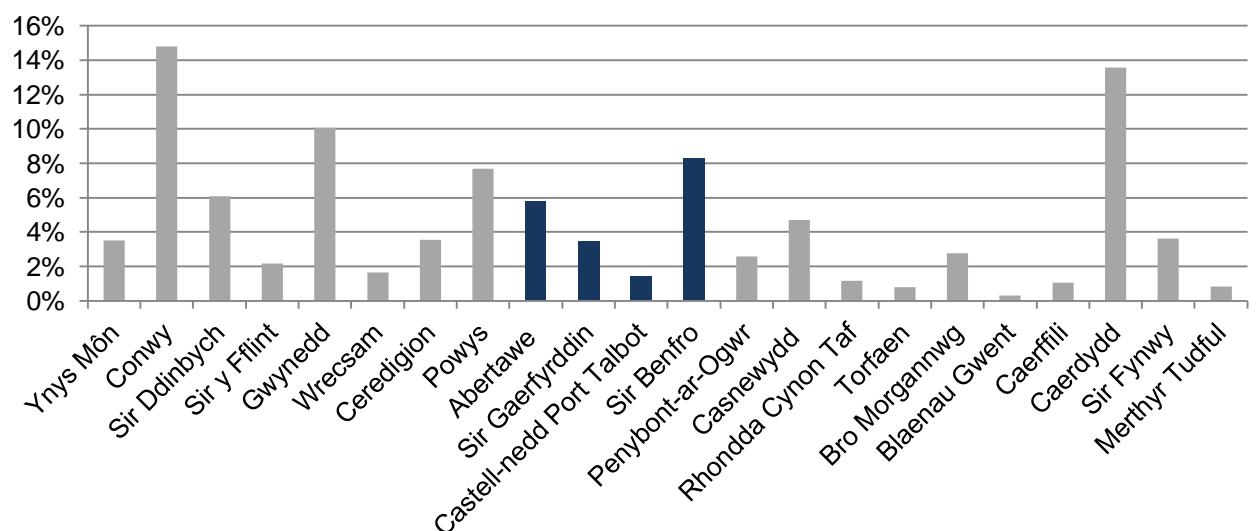


Fig. 6.2: Serviced Bedstock



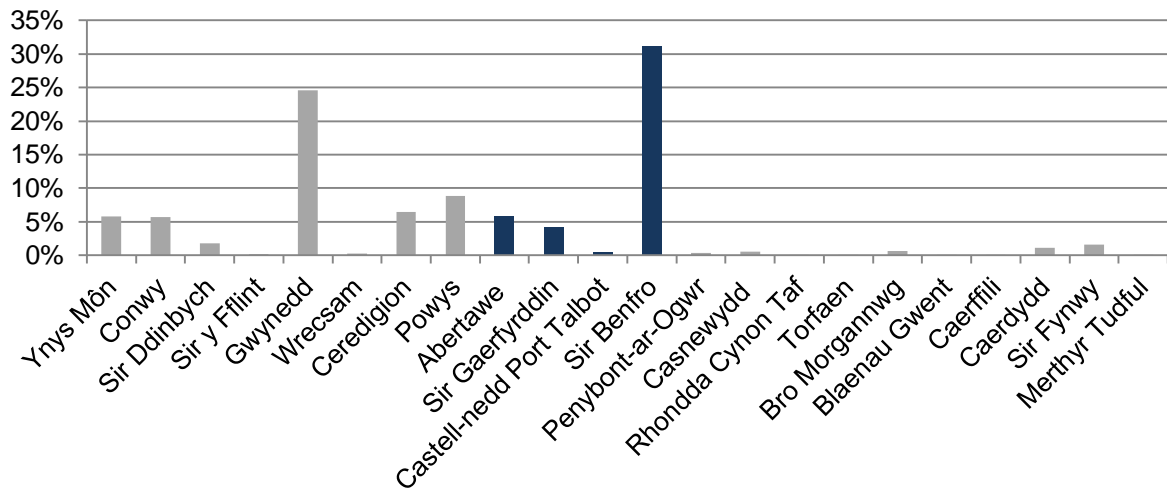


Fig. 6.4: Camping/Caravanning Bedstock

