



Llywodraeth Cymru  
Welsh Government

RESEARCH

# Summary of Wales bedstock data: situation as at June 2022

Bedstock surveys show the number of tourism accommodation establishments and bed spaces in Wales by accommodation type as at June 2022.

**First published:** 18 August 2022

**Last updated:** 18 August 2022

# Contents

**Background**

**Methodology**

**Visitor accommodation supply**

**Analysis of changes over time**

**Glossary of terms**

**Contact details**

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://gov.wales/summary-wales-bedstock-data-situation-june-2022-html> for the latest version.

Get [information on copyright](#).

# Background

Information on Accommodation Bedstock in Wales is key in gaining an accurate picture of the composition of one of the most significant parts of the Visitor Economy in Wales. This information is important for planning and investment purposes, especially at local levels. It can also be useful when planning major events, and has been used in the COVID pandemic response, for example when assessing accommodation supply for key workers and vulnerable people during lockdown periods.

Accommodation Bedstock surveys have for some years been an area of positive collaboration between the Welsh Government, Local Authorities and Regional Tourism Partnerships. The surveys have been jointly funded and undertaken according to a standard method (using standard questionnaires and definitions), with the results being provided by individual Local Authorities for collation centrally by the Welsh Government.

The accommodation bedstock picture is constantly changing as new establishments open or close, expand or contract, upgrade or diversify. It follows that the records can only provide the best available 'snapshot' of the situation at a given point in time. Generally, records are updated on an ongoing basis by the Local Authorities, with a full survey undertaken every few years. This aggregated, composite total for Wales is based on best available information as of June 2022. Bedstock records are in a sense always a 'work in progress' but with each iteration, there are improvements on accuracy and consistency.

This Accommodation Bedstock Interim Report updates the **figures published in 2013** for 20 of the 22 Local Authorities. The remaining two Local Authorities (Flintshire and Wrexham) are intending to undertake full bedstock surveys, and a fully updated report is planned for publication later this year.

The tables in Section 3 of this report, relating to accommodation establishments,

and accommodation bedspaces, summarise the top line figures based on data gathered by 20 of the 22 Local Authorities between 2017 and 2022. For Flintshire and Wrexham the 2013 figures have been used.

## Methodology

Each Local Authority was responsible for collecting data relating to accommodation providers in their area using a standard questionnaire and definitions, and this was collated by Welsh Government for further analysis.

The data collection is intended to give as complete a picture as possible of the visitor accommodation supply in Wales, and thus every accommodation provider is contacted and asked to complete the survey. However, it is not practicably possible to identify and gather data from all businesses and therefore the figures in this report provide the best available 'snapshot' of accommodation supply at a given time. Figures shown in this report are given in good faith based on information provided by Local Authorities, but there may be some inconsistencies in the way accommodation is categorised.

Bedstock figures give the maximum bedspace capacity, although some establishments may be closed or partially closed at certain times during the year so not all rooms, units or bedspaces counted are available at all times. In particular, caravan and camping sites are likely to operate seasonally, being closed or operating with reduced bedspaces over winter.

Number of bedrooms was not included in the analysis for this report as it was not included in the 2013 bedstock report. When the outstanding data from the remaining Local Authorities is published later in the year bedroom analysis will be included.

Where survey responses are incomplete and Local Authorities have been

unable to contact establishments, estimates of units, bedrooms and bedspaces can be included. Where only the number of units/rooms or the number of bedspaces is known, the missing value can be imputed using a prescribed ratio, according to the type of accommodation. Where both the number of units/rooms and number of bedspaces is unknown, an estimated value for both can be imputed based on averages for each type of accommodation from previous survey data, or local knowledge, where this suggests a more accurate estimate. Full details are in [Annex A \(MS Excel 26kB\)](#).

Temporary home lettings or individual private rooms in private homes, (i.e. short term rentals on sites such as Airbnb) may be inconsistently counted in this bedstock data due to the variable nature of the supply.

It should be noted that there may be differences in categorisation of alternative accommodation between Local Authorities, who may take differing approaches when considering whether to class an establishment as 'alternative' or 'caravan & camping'. Categorisation should be made according to the guidance and based on the accommodation and facilities available, but given the evolving nature of the sector this process can involve a degree of subjectivity.

Desk research and other listing databases were used to identify all accommodation establishments in an area and to source contact details. Data collection questionnaires were then sent via email and/or post as preferred. Establishments were contacted via telephone and/or email to encourage full participation where possible, but inevitably some businesses did not supply data for inclusion.

Where premises offer more than one type of accommodation e.g. B&B and self-catering, all types of accommodation are recorded and such a premises would be counted in the Establishment total for Serviced and Self-catering. As such, the sum of number of establishments per category in a particular area may exceed the total number of establishments reported. Rooms and bedspaces will be categorised individually so the sum of each rooms and bedspaces for

accommodation category will match the overall total.

Response rates and therefore proportions of estimated values used varied across Local Authority and type of accommodation. Overall, 28% of the bedspaces counted across Wales were based on an estimated value, either where the number of rooms / units were known and a bedspace estimate was calculated using a ratio, or where both number of rooms / units and bedspaces were estimated based on category mean imputations from previous survey data. The proportion of estimated bedspaces was highest among caravan & camping accommodation, and 35% of these bedspaces were based on an estimate. This may not be surprising since tent and caravan pitches are often considered to accommodate an average maximum of 4 people. Self-catering accommodation figures used the lowest rate of estimated bedspaces, at just 8%.

Alternative data collection methods are being researched for future accommodation bedstock surveys to achieve a more complete and timely picture of visitor accommodation supply.

## Visitor accommodation supply

### Accommodation establishments

**Table 3.0: Number of establishments per accommodation category by local authority**

Area	Serviced	Self-catering	Caravan / Hostel Camping	Alternative	Total
Wales	2,582	12,145	1,434	244	195 16,600

Area	Serviced	Self-catering	Caravan / Hostel Camping	Alternative	Total	
(Isle of) Anglesey	78	125	96	2	3	304
Blaenau Gwent	14	27	1	-	1	43
Bridgend	40	48	12	1	-	101
Caerphilly	28	43	4	3	2	80
Cardiff	79	33	1	21	-	134
Carmarthenshire	166	493	95	5	22	781
Ceredigion	256	628	155	17	19	1,075
Conwy	323	848	151	16	8	1,346
Denbighshire	79	304	45	3	8	439
Flintshire*	43	13	17	0	0	73
Gwynedd	345	3,165	366	52	24	3,952
Merthyr Tydfil	21	22	3	8	1	55
Monmouthshire	133	293	31	9	44	510

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://gov.wales/summary-wales-bedstock-data-situation-june-2022-html> for the latest version.

Get [information on copyright](#).

Area	Serviced	Self-catering	Caravan / Hostel Camping	Alternative	Total	
Neath Port Talbot	35	100	7	2	1	145
Newport	53	63	5	1	-	122
Pembrokeshire	226	4,618	226	22	21	5,113
Powys	415	694	137	63	28	1,337
Rhondda Cynon Taf	27	20	1	6	-	54
Swansea	62	403	42	7	3	517
Torfaen	11	3	-	-	-	14
Vale of Glamorgan	96	170	17	4	10	297
Wrexham*	52	32	22	2	0	108

\*Flintshire and Wrexham figures for 2013 are included as estimates. Updated figures will be available later in 2022.

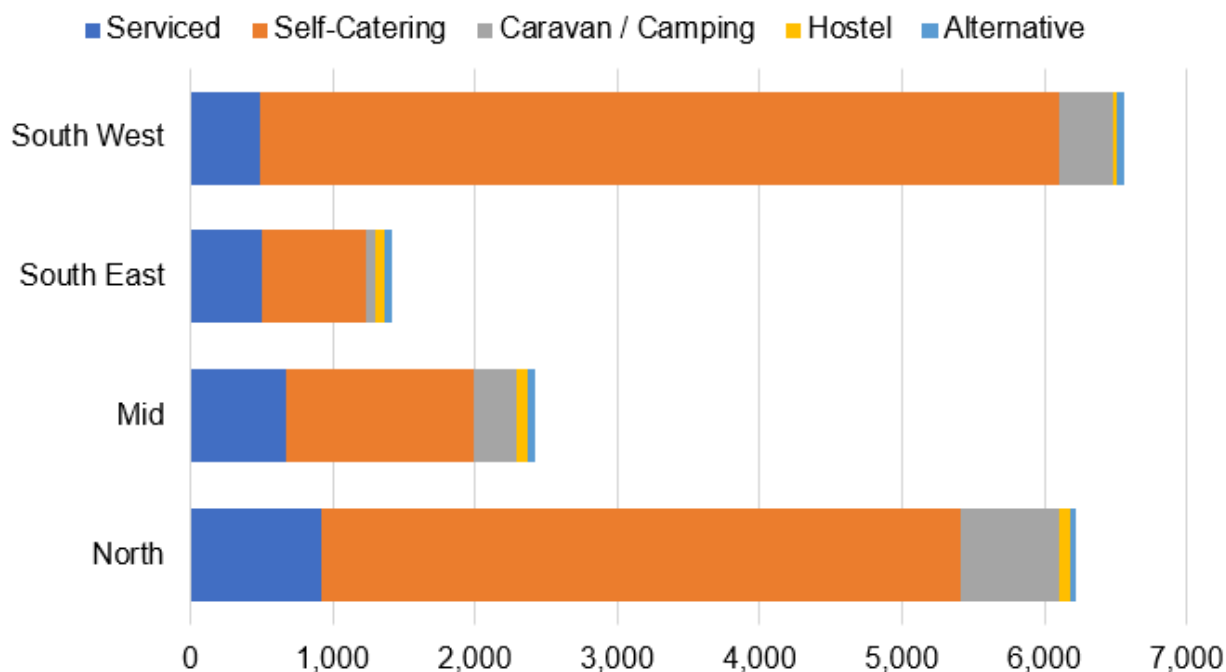


**Figure 3.0: Number of establishments per accommodation category by Wales region, as at June 2022**



16,600 accommodation properties / establishments in Wales were identified. At 12,145, the majority (73%) were self-catering establishments. 2,582 (16%) were serviced, and 1,434 (9%) were camping and/or caravan sites. Additionally, 244 hostels and 195 alternative accommodation establishments (which includes nomadic structures such as tipis, yurts, pods, shepherd huts and Romany caravans) were identified.

**Figure 3.1: Accommodation establishments by Wales region, as at June 2022**



South West Wales has the largest number of accommodation establishments of the four regions (6,557), equating to two in five (39%) accommodation establishments in Wales. The majority, 5,615, are self-catering.

North Wales has the second largest share of establishments, 37% (6,219). Similarly, the majority, 4,482, are self-catering establishments.

Mid Wales has 2,413 establishments (15% of the total), and South East Wales 1,411 (9%).

## Bedspaces

**Table 3.1: Number of bedspaces per accommodation category by local authority**

Area	Serviced	Self-Catering	Caravan / Camping	Hostel	Alternative	Total
Wales	70,585	78,510	434,286	19,413	2,417	605,211
(Isle of) Anglesey	1,414	2,216	27,528	193	121	31,472
Blaenau Gwent	387	127	240	-	s2	756
Bridgend	1,671	422	14,184	12	-	16,289
Caerphilly	1,014	241	1,348	50	19	2,672
Cardiff	10,767	620	130	5,858	-	17,375
Carmarthenshire	3,067	5,006	18,053	142	294	26,562
Ceredigion	3,711	5,497	36,974	2,931	244	49,357
Conwy	9,460	4,433	61,959	458	49	76,359
Denbighshire	2,992	1,655	26,404	145	38	31,234

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://gov.wales/summary-wales-bedstock-data-situation-june-2022-html> for the latest version.

Get [information on copyright](#).

Area	Serviced	Self-Catering	Caravan / Camping	Hostel	Alternative	Total
Flintshire*	1,712	115	16,893	0	0	18,720
Gwynedd	6,387	18,444	108,482	2,737	506	136,556
Merthyr Tydfil	438	129	252	194	18	1,031
Monmouthshire	2,996	1,746	2,971	249	413	8,375
Neath Port Talbot	1,446	785	468	124	15	2,838
Newport	3,749	342	593	718	-	5,402
Pembrokeshire	4,815	26,963	67,493	1,311	347	100,929
Powys	6,038	5,259	24,698	1,911	228	38,134
Rhondda Cynon Taf	911	144	144	1,158	-	2,357
Swansea	3,786	3,160	21,983	939	48	29,916
Torfaen	367	22	-	-	-	389
Vale of Glamorgan	2,160	1,016	1,427	56	75	4,734

This document was downloaded from GOV.WALES and may not be the latest version.

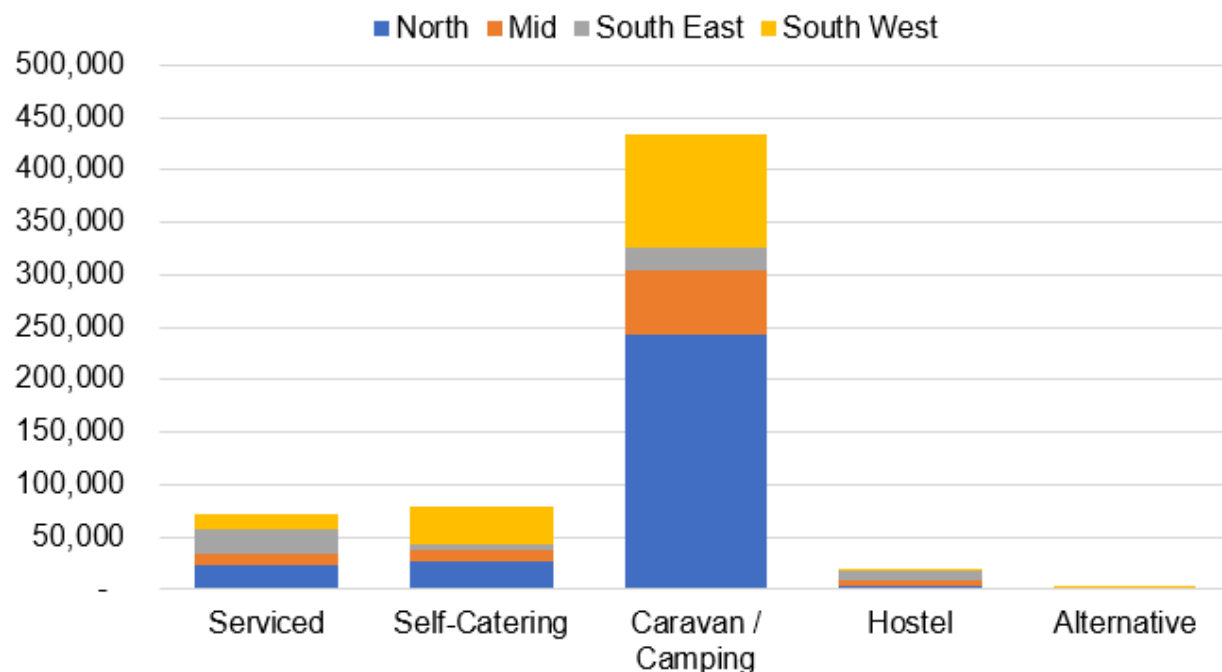
Go to <https://gov.wales/summary-wales-bedstock-data-situation-june-2022-html> for the latest version.

Get [information on copyright](#).

Area	Serviced	Self-Catering	Caravan / Camping	Hostel	Alternative	Total
Wrexham*	1,297	168	2,062	227	0	3,754

\*Flintshire and Wrexham figures for 2013 are included as estimates. Updated figures will be available later in 2022.

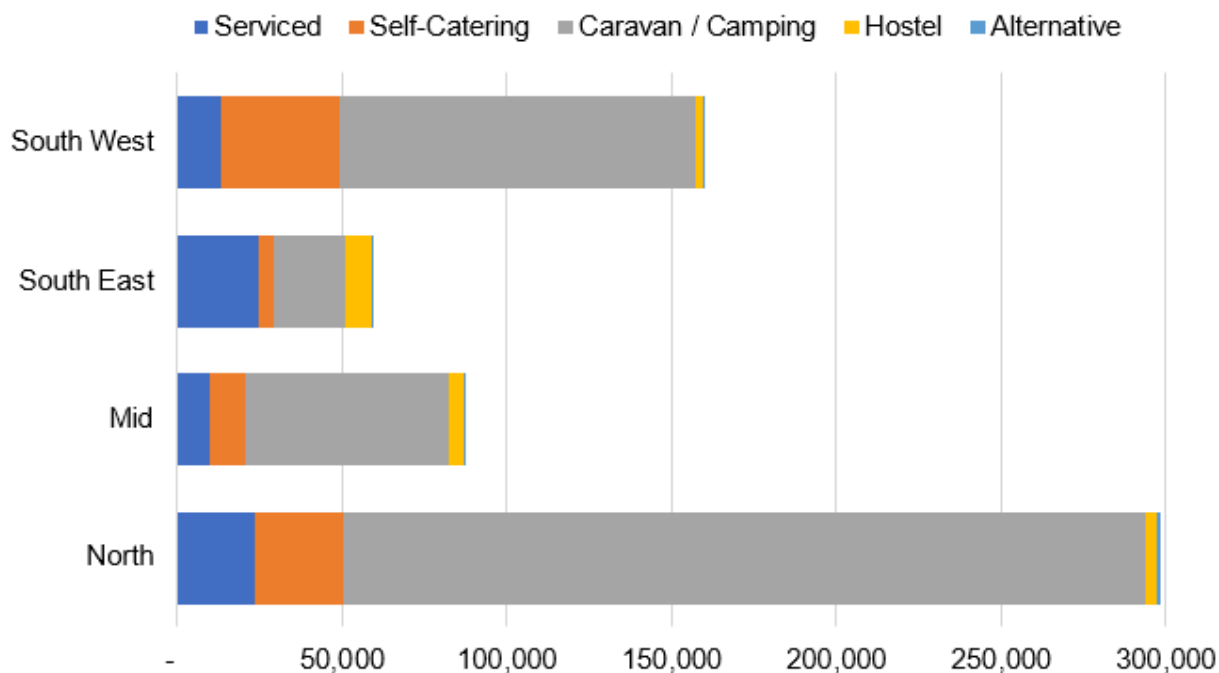
**Figure 3.2: Number of bedspaces per accommodation category by Wales region, as at June 2022**



A total of 605,211 visitor accommodation bedspaces were identified across Wales. At 434,286, the majority of bedspaces (72%) were in caravan or camping establishments. 78,510 (13%) were in self-catering accommodation and a similar number, 70,585 (12%) were in serviced accommodation. Hostels

accounted for just 3% of bedspaces (19,413) and Alternative accommodation less than 1% (2,417).

**Figure 3.3: Accommodation bedspaces by Wales region, as at June 2022**

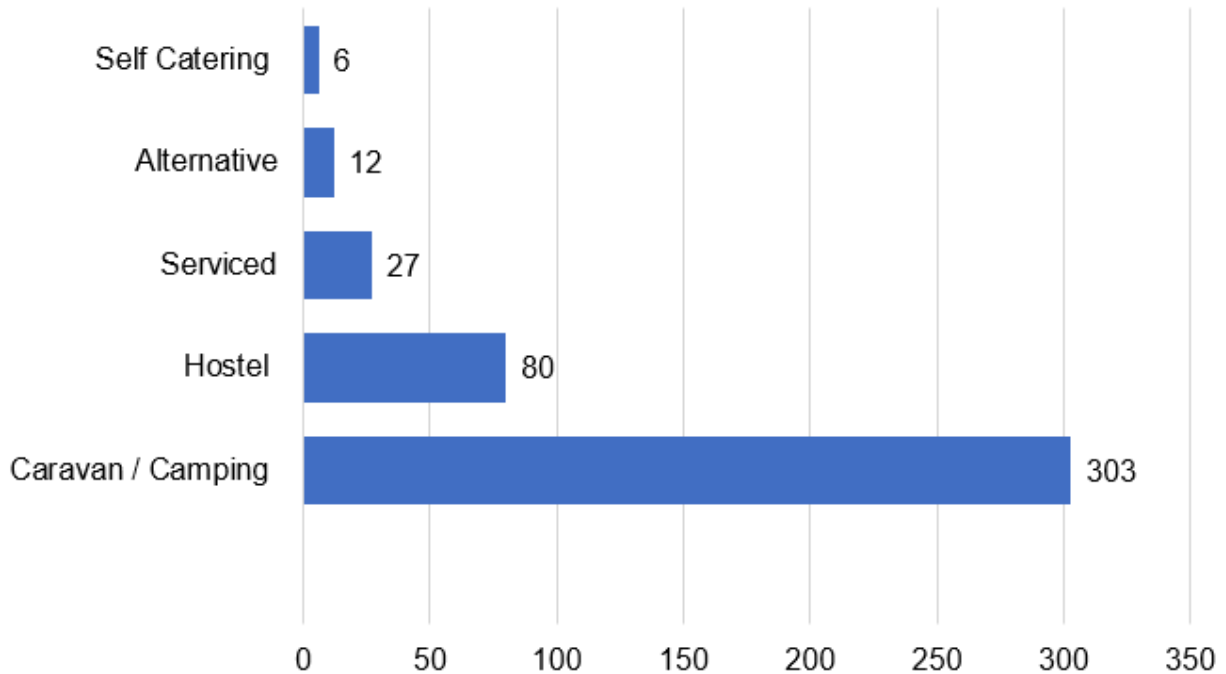


North Wales has the largest number of bedspaces of the four regions (298,095), equating to almost half (49%) of bedspaces in Wales. Over 4 in 5 (82%), 243,328, are caravan & camping bedspaces.

South West Wales has the second largest share (26%), with 160,245 bedspaces. Two thirds (107,997) are caravan & camping but over a fifth, 35,914, are in self-catering.

Mid Wales has 87,491 bedspaces (14% of the total), and South East Wales 59,380 (10%).

**Figure 3.4: Average number of bedspaces per establishment, as at June 2022**



Caravan & Camping establishments have the largest number of bedspaces per establishment, with 303 bedspaces per site on average.

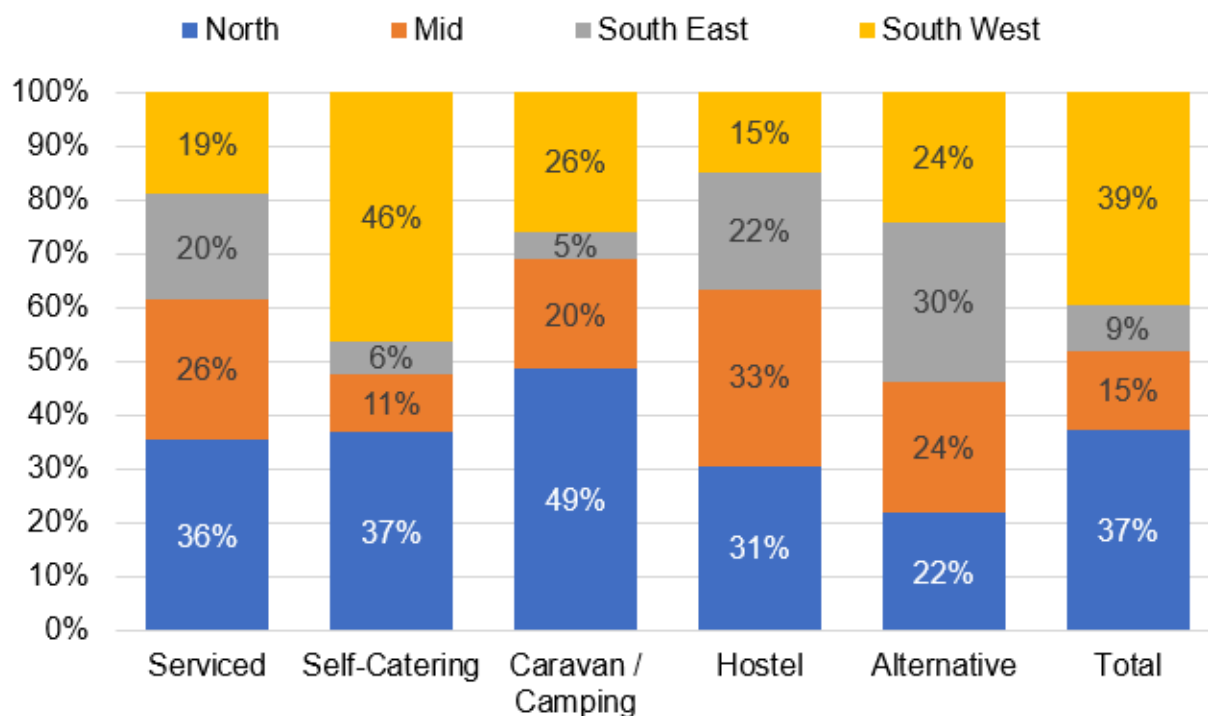
In 2013 the average number of bedspaces per Serviced establishment was 25 (compared to 27 in this report), Self-catering had an average of just under 9 (compared to 6) bedspaces per establishment. Camping and Caravans had an average of 302 bedspaces per establishment (compared to 303).

Overall these figures suggest the average size of accommodation has not changed even as the sectors have expanded (or shrunk, the case of serviced)

The high number of bedspaces per establishment for caravans and camping is likely due to the multiple units per site.

## Regional variations

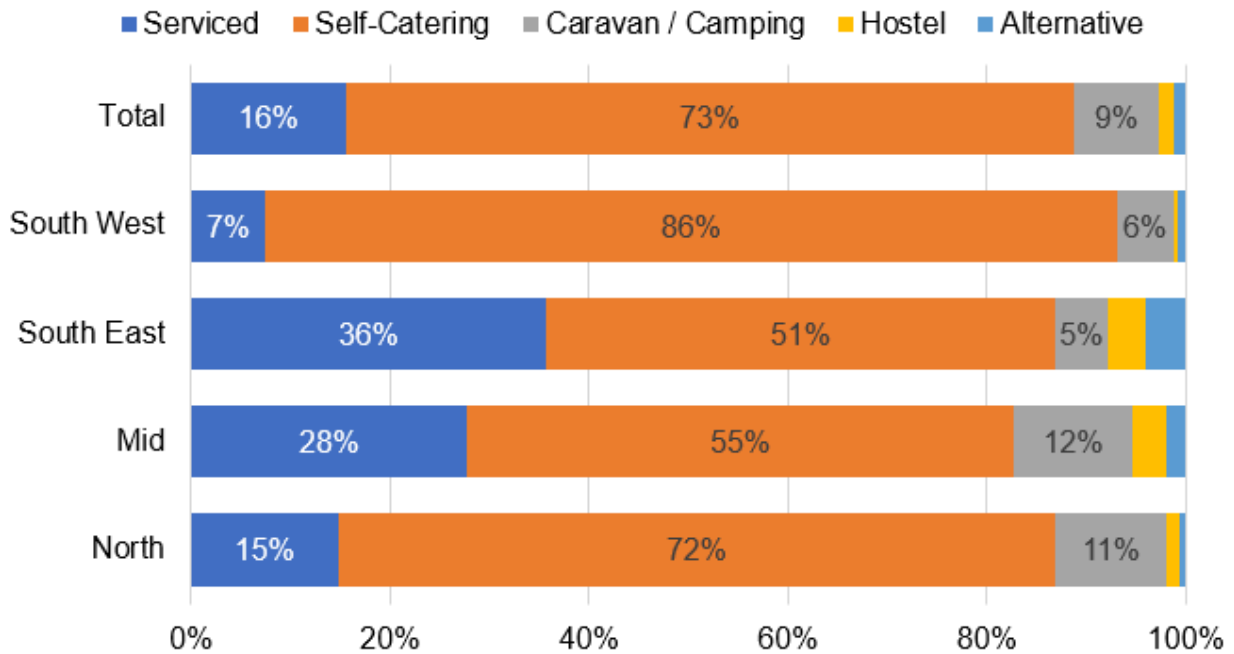
**Figure 3.5: Regional distribution of accommodation establishments, as at June 2022**



South West Wales, with 6,557 and North Wales, with 6,038 together account for around three quarters of accommodation establishments, but distribution varies by category. Alternative establishments are distributed fairly evenly across regions, though the small base size (195) should be noted.

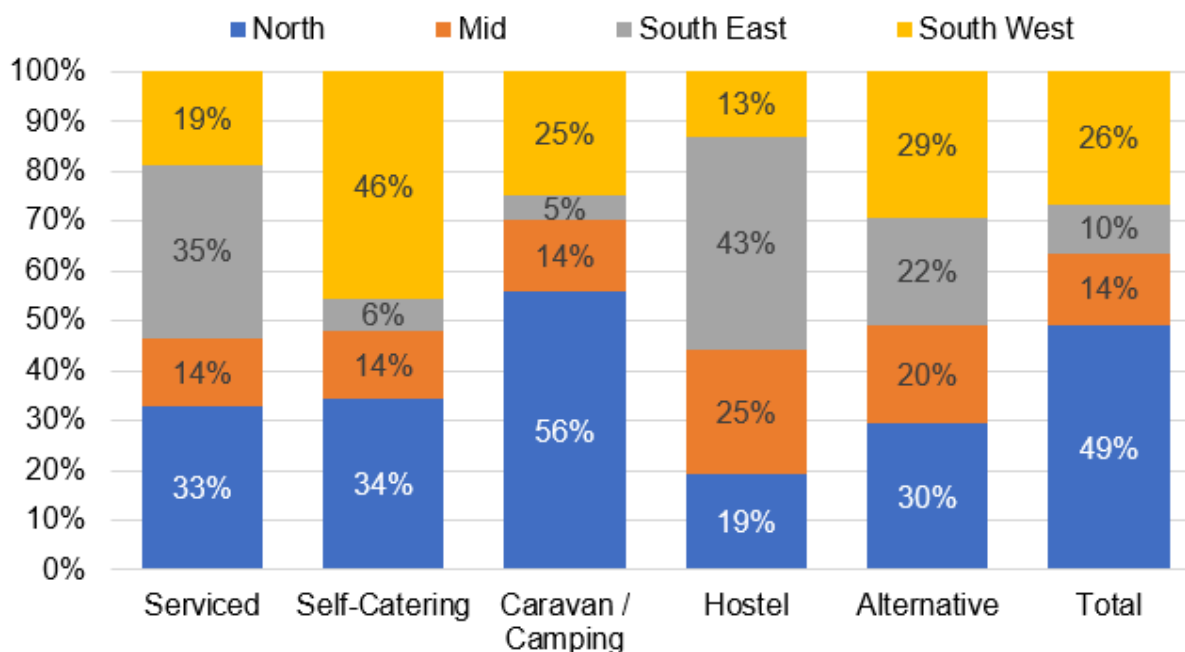


**Figure 3.6: Distribution of accommodation establishments by Wales region, as at June 2022**



The distribution of types of visitor accommodation varies across Wales. In South West Wales a higher proportion are self-catering establishments and in South East Wales the proportion of serviced establishments is considerably higher than in other regions. Caravan & Camping sites over-index in Mid and North Wales.

**Figure 3.7: Regional distribution of accommodation bedspaces, as at June 2022**

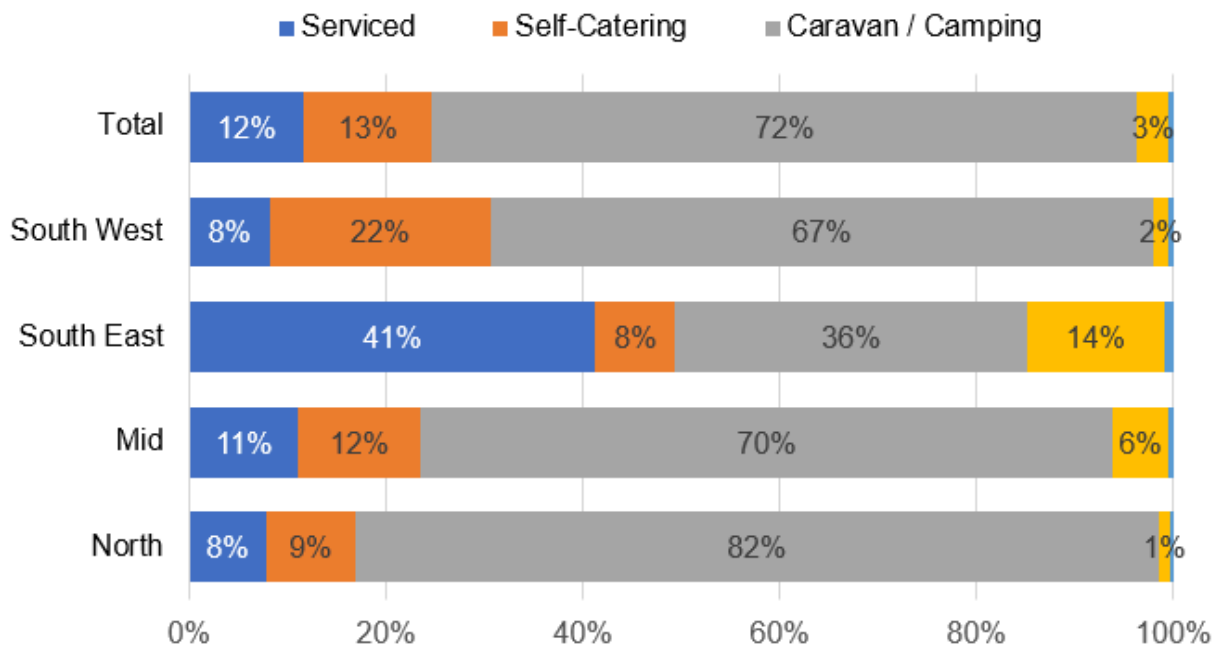


Half of all visitor accommodation bedspaces are in North Wales (49%), a quarter (26%) are in South West Wales. This distribution differs from that of accommodation establishments across the two regions, reflective of the larger number of caravan and camping establishments in North Wales and of self-catering establishments in South West Wales. Over half (56%) the Caravan & Camping bedspaces in Wales are in North Wales.

14% of bedspaces are found in Mid Wales, though it accounts for a quarter of Hostel bedspaces.

Only 10% of bedspaces are in South East Wales, though over 4 in 10 (43%) Hostel bedspaces and over a third (35%) of Serviced bedspaces are found there.

**Figure 3.8: Distribution of accommodation bedspaces by Wales region, as at June 2022**



The makeup of accommodation supply varies across regions. South East Wales over-indexes on Serviced bedspaces, where 4 in 10 fall under this category, but the proportion of Caravan & Camping bedspaces is considerably lower than across Wales on average.

In North Wales Caravan & Camping bedspaces make up 4 in 5 of the bedstock, with Services and Self-Catering bedspaces making up a lower proportion of the offer than elsewhere in Wales.

South West Wales over indexes on Self-Catering bedspaces, and has fewer Caravan & Camping bedspaces than the average.

Mid Wales bedspace distribution by category closely matches the Wales average.

## Local authority variations

The visitor accommodation bedstock supply varies considerably across regions and local authority areas. Together, Pembrokeshire and Gwynedd account for 55% of all accommodation establishments and 41% of bedspaces in Wales. Pembrokeshire has the largest number of accommodation establishments with 5,113, but Gwynedd has the most bedspaces at 136,556 due to the larger proportion of caravan & camping establishments in the latter, making up 79% of their bedspaces. In Pembrokeshire 90% of establishments are self-catering.

Powys has the largest number of serviced establishments with 415 followed by Gwynedd with 346 and Conwy with 323. Cardiff has the largest number of Serviced bedspaces with 10,767 (and the highest average size, at 136 bedspaces per establishment) followed by Conwy with 9,460. Gwynedd and Powys each have over 6,000 serviced bedspaces.

Gwynedd has the largest number of caravan & campsites (366) and bedspaces (108,482), followed by Pembrokeshire with 226 sites and 67,493 bedspaces.

Pembrokeshire has the largest number of self-catering establishments (4,618) and bedspaces (26,963) followed by Gwynedd with 3,165 establishments and 18,444 bedspaces.

Powys (63) and Gwynedd (52) have the most Hostel establishments, but Cardiff (5,858) and Ceredigion (2,931) top the list of most Hostel bedspaces.

Monmouthshire (44) and Powys (28) have the largest number of Alternative accommodation establishments, and whilst Monmouthshire comes second on bedspaces (413), the largest number is in Gwynedd which has 506 Alternative accommodation bedspaces among 24 establishments.

# Analysis of changes over time

The following analysis compares the current data with equivalent 2013 values where updated. This section therefore does not include analysis of the Wrexham or Flintshire bedstock.

## Accommodation establishments

Compared to 2013, 41% more visitor accommodation establishments were identified in the recent surveys.

This was driven largely by a 72% increase in the number of self-catering establishments overall, from 7,022 in 2013 to 12,145. There were also increases in the number of caravan & camping, Hostel, and Alternative establishments.

The largest absolute increases were in Pembrokeshire, where self-catering establishments almost doubled from 2,419 in 2013 to 4,618; and in Gwynedd where establishments rose by 63% from 1,940 to 3,165.

Serviced accommodation is the only category to see a decrease in the number of establishments, down 20% from 3,110 in 2013 to 2,582. Though all regions saw a decline in serviced accommodation the South West region saw the biggest overall drop with 310 fewer serviced establishments. The North came second losing 230 establishments.

## Bedspaces

In contrast, the number of bedspaces has increased by only 13% since 2013, from 537,217 to 605,211.

There has been a 25% increase in self-catering bedspaces, combined with the 72% increase in self-catering establishments results in a lower average bedspace per establishment than in 2013. Caravan & camping bedspaces increased 9% adding 35,162 bedspaces to the bedstock (the largest increase in absolute terms). Hostel bedspaces also increased by 12%, in line with the 9% increase in hostel establishments.

Again, the only category to see a reduction in supply was serviced accommodation. There were 11% fewer serviced bedspaces compared to 2013 (a decrease of 8,313 bedspaces). The largest absolute changes were seen in Conwy, Denbighshire, Gwynedd and Pembrokeshire which each reported at least 1,500 fewer serviced bedspaces compared to 2013. Anglesey reported half as many (49% fewer) serviced bedspaces, and Torfaen saw the largest proportional decrease, at 42%, although from a comparatively lower initial supply.

Whilst the mix of types of accommodation has changed somewhat since 2013, and alternative accommodation has seen sharp percentage increases in supply from 1013 in 2013 to 2417 in 2022, this type of accommodation still represents a very small proportion of the visitor accommodation offer.

## Glossary of terms

### Establishment

Individual site on which visitor accommodation is provided i.e. this may include hotels, campsites, self-catering complexes or an individual self-catering cottage.

## **Bedspace**

The maximum capacity of a unit, pitch or room for adults staying overnight i.e. a double bed counts as two bedspaces.

## **Unit**

Individual house, apartment or other premises, for sole use of the occupants.

## **Pitch**

Individual space in a caravan or camping site, suitable for any of the following: tents, caravans or motorhomes.

## **Serviced accommodation**

Includes accommodation establishments categorised as: Hotel, B&B, Guesthouse, Farmhouse, Inn, Restaurant with Rooms, Guest Accommodation.

## **Hotel**

Has a minimum of 6 letting bedrooms, all rooms to have en-suite or private facilities. Evening meals are served at least five days a week and a bar or sitting area with Liquor Licence is provided. Hotel must be open seven days a week during operating season and provides a clearly designated reception facility.

## **B&B**

Accommodation provided in a private house, run by the owner and with no more than six paying guests.

## **Guesthouse**

Accommodation provided for more than six paying guests and run on a more commercial basis than a B&B. Usually more services, for example, dinner, provided by staff as well as the owner.

## **Farmhouse**

B&B or guesthouse accommodation provided on a working farm or smallholding or croft.

## **Inn**

Accommodation provided in a fully licensed establishment. The bar will be open to non-residents and provide food in the evenings (not necessarily 7 nights per week).

## **Restaurant with rooms**

Destination restaurant offering overnight accommodation with the restaurant being the main business and open to non-residents. The restaurant should offer a high standard of food and restaurant service at least five nights a week. A liquor licence and a maximum of 12 bedrooms are necessary.



## **Guest accommodation**

Any establishment that meets the minimum entry requirement is eligible for this general sub-category

## **Self-catering accommodation**

Non-Serviced type accommodation including cottages, houses, bungalows, flats and chalets.

## **Camping and caravan accommodation**

Holiday parks, static caravan, touring caravan or camping sites.

## **Holiday park**

Parks whose main business is letting holiday caravans although there may be a few pitches for touring caravans.

## **Touring park**

Parks with pitches only for touring caravans, motor-homes and tents.

## **Camping park**

Parks that only cater for tents.

## **Holiday and touring park**

Parks where there is a balance of lets between for example, static and touring caravans.

## **Holiday and camping park**

Parks where there is a balance of lets between for example, static caravans and tents.

## **Touring and camping park**

Parks where there is a balance of lets between for example, tents and touring caravans.

## **Holiday, touring and camping park**

Parks where there is a balance of lets between for example, static caravans, touring caravans and tents.

## **Hostel and group accommodation**

Establishments including: Hostel, Group Accommodation, Activity Accommodation, Backpacker Accommodation, Bunkhouse, Camping Barns, Campus Accommodation

## **Hostel**

Star rated accommodation often in shared rooms with bunk beds, family rooms may also be available.

## **Group accommodation**

Star rated accommodation often in shared rooms with bunk beds.

## **Activity accommodation**

Star rated accommodation normally provided on a group basis. The establishment will also offer fully accredited or A.A.L.A. licensed activities.

## **Backpacker accommodation**

Very similar in style to a hostel, but may be run on less formal lines such as 24 hour access

## **Bunkhouse**

Star rated rural accommodation. Services and facilities may be limited, but will include a self-catering facility.

## **Camping barns**

Simple overnight accommodation in a rural setting often referred to as “stone

tents”.

## Campus accommodation

Purpose built student residence offering accommodation, available primarily during holiday periods

## Alternative accommodation

Unusual or unique accommodation including Romany caravans, airstream caravans, eco/glamping pods or cabins, shepherd’s huts, tree houses, converted boats / buses, lighthouses etc. and nomadic structures such as tipis/yurts/safari tents.

## Contact details

For further information please contact:

Phil Nelson

Email: [tourismresearch@gov.wales](mailto:tourismresearch@gov.wales)

Social research number: 58/2022

Digital ISBN 978-1-80364-676-3



**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://gov.wales/summary-wales-bedstock-data-situation-june-2022-html> for the latest version.

Get [information on copyright](#).

**This document may not be fully accessible.**

For more information refer to our [accessibility statement](#).

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://gov.wales/summary-wales-bedstock-data-situation-june-2022-html> for the latest version.

Get [information on copyright](#).