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# Regional Tourism Profiles, 2014: South East Wales

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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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 East Wales

<b>Trips (Thousands)</b>	<b>2011-2013 Average</b>	<b>2012-2014 Average</b>	<b>% change</b>
<b>Overnight Visits (GB residents)</b>	2,310	2,231	-1%
<b>Overnight Visits (International)</b>	436	441	+1%
<b>Day Visits</b>	41,000	38,000	-7%
<b>Total</b>	43,746	40,672	-7%

<b>Spend (£ millions)</b>	<b>2011-2013 Average</b>	<b>2012-2014 Average</b>	<b>% change</b>
<b>Overnight Visits (GB residents)</b>	374	361	-3%
<b>Overnight Visits (International)</b>	168	165	-2%
<b>Day Visits</b>	1,556	1,465	-6%
<b>Total</b>	2,098	1,991	-5%

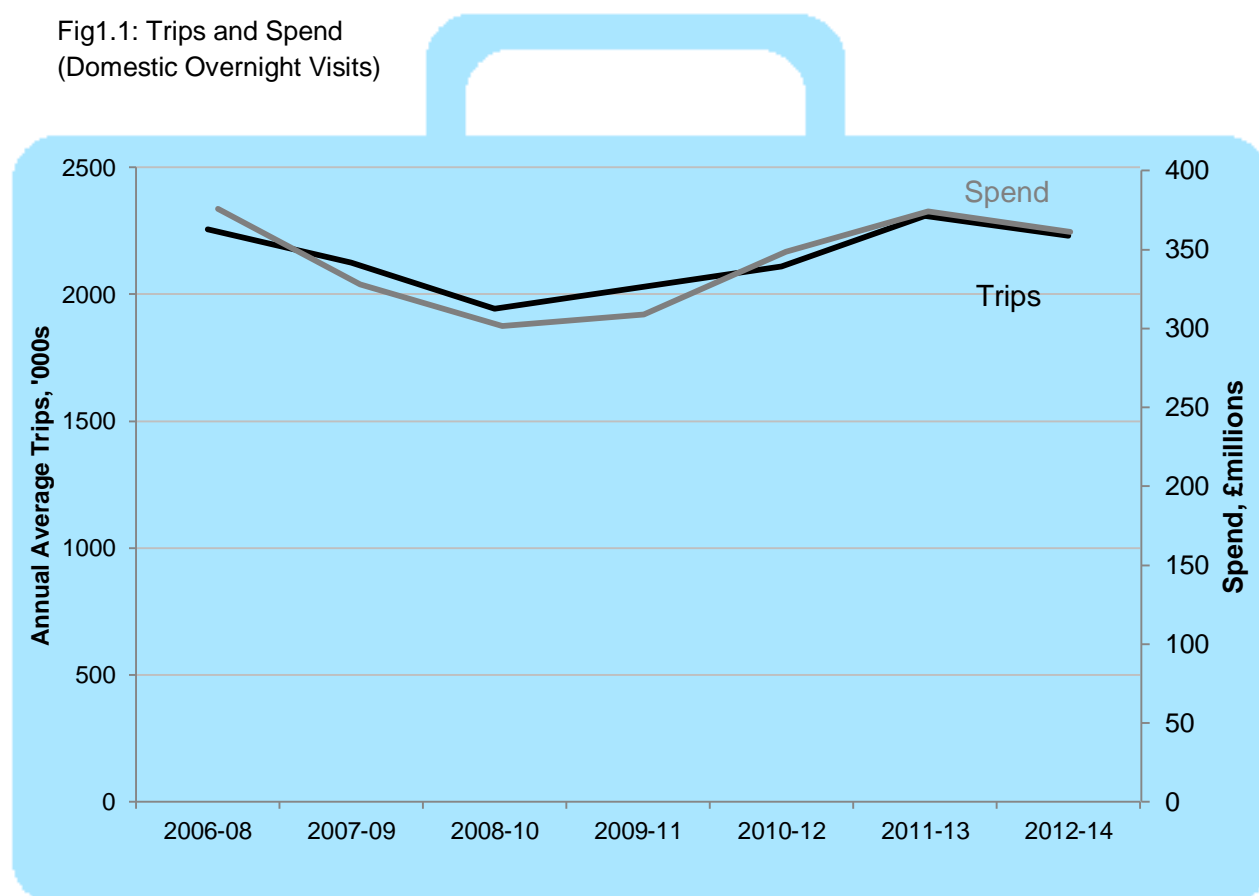
The South East Wales tourism region is made up of a number of the smaller Local Authorities of Wales, namely Bridgend, the Vale of Glamorgan, Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Cardiff, Newport and Monmouthshire. This is the most densely populated of the Welsh tourism regions, and the one with the highest proportion of urban region, though it is not all urban, and does include the southernmost part of the Brecon Beacons National Park, which is a designated Dark Sky Region.

## 1. Overnight Visits by GB Residents

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

This is the only region in Wales where the number of domestic overnight trips has fallen, from an average of 2,255,000 per year in 2006-08, to 2,231,000 per year in 2012-14. However, the overall fall has been slight (about 1%), and this region remains the second most popular destination for domestic overnight trips, with 23% of all domestic overnight trips to Wales in the years 2012-14 being to a destination within South East Wales.

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



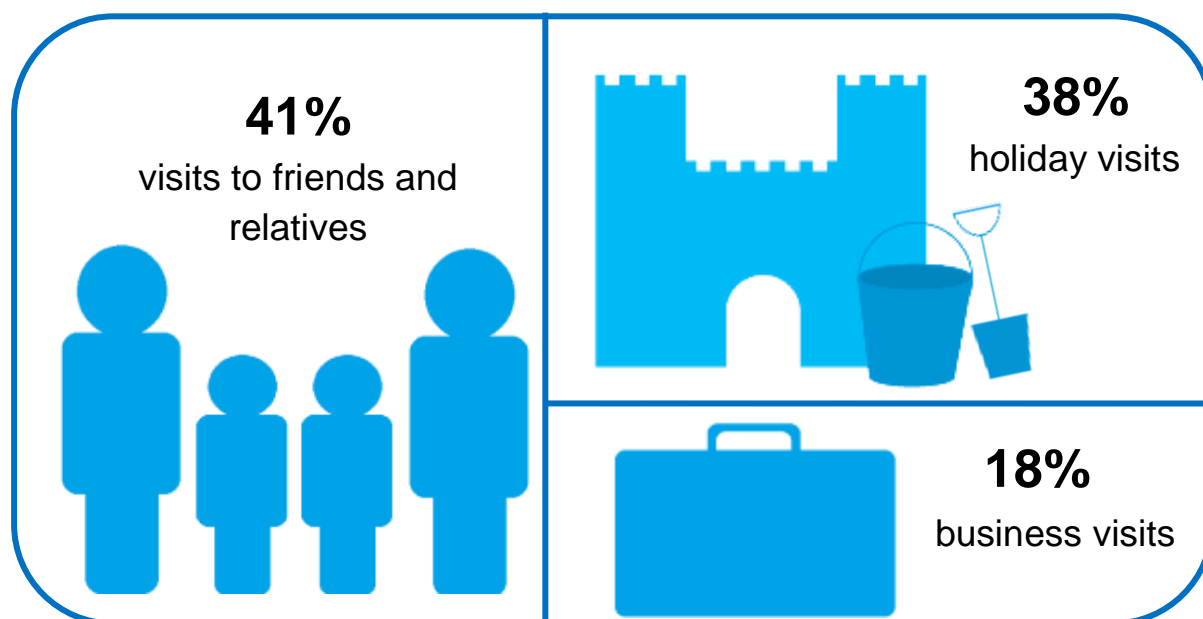
Spend on domestic overnight trips in this region has also declined, from an annual average of £376 million in 2006-08 to £361 million in 2012-14. Contrary to the general Wales trend, this means that spend per trip has decreased in this region over the last 9 years. This may be partly because of a decrease in the average length of trips to this region. While there has been a general trend across Wales of a decrease in the average length of trips, it has been

particularly pronounced in this region, from an average of 2.75 nights per trip to an average of 2.37 nights, a decrease of 14% between 2006-08 and 2012-14.

### Purpose of Visit

Unlike all other regions of Wales, the most common reason for a domestic overnight trip to South East Wales was to visit friends or family. There was also a higher proportion of business trips to this region than to any of the other Welsh regions, and a lower proportion of holiday visits.

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



### Seasonality of Visit

Trips to South East Wales are far less seasonal than trips to Wales overall; although trips are slightly more likely to begin in the summer, the difference is only small.

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

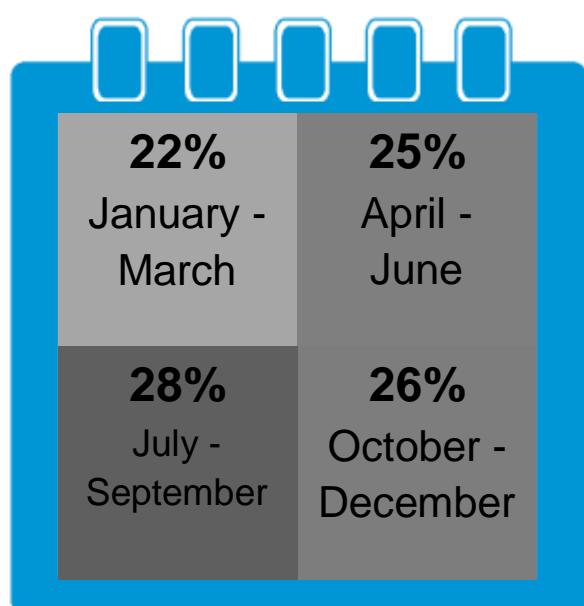
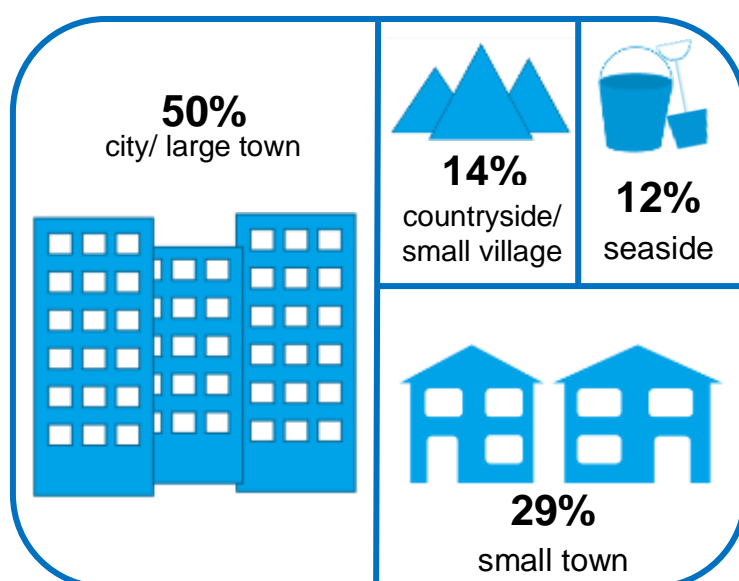


Fig. 1.4: Type of Place Visited (Domestic Overnight Visits)



### Type of Place

The types of place visited by domestic overnight visitors also differ markedly from the figures for Wales overall, or for any other region of Wales, with visitors to this region far more likely to have visited a city or large town, and far less likely to have visited the seaside, the countryside, or a small village. None of this should be surprising, as a much higher proportion of this region is made up of large towns or cities than is the case in Wales overall.

### Region of Origin

Table 1.1: Region of Origin (Domestic Overnight Visits)

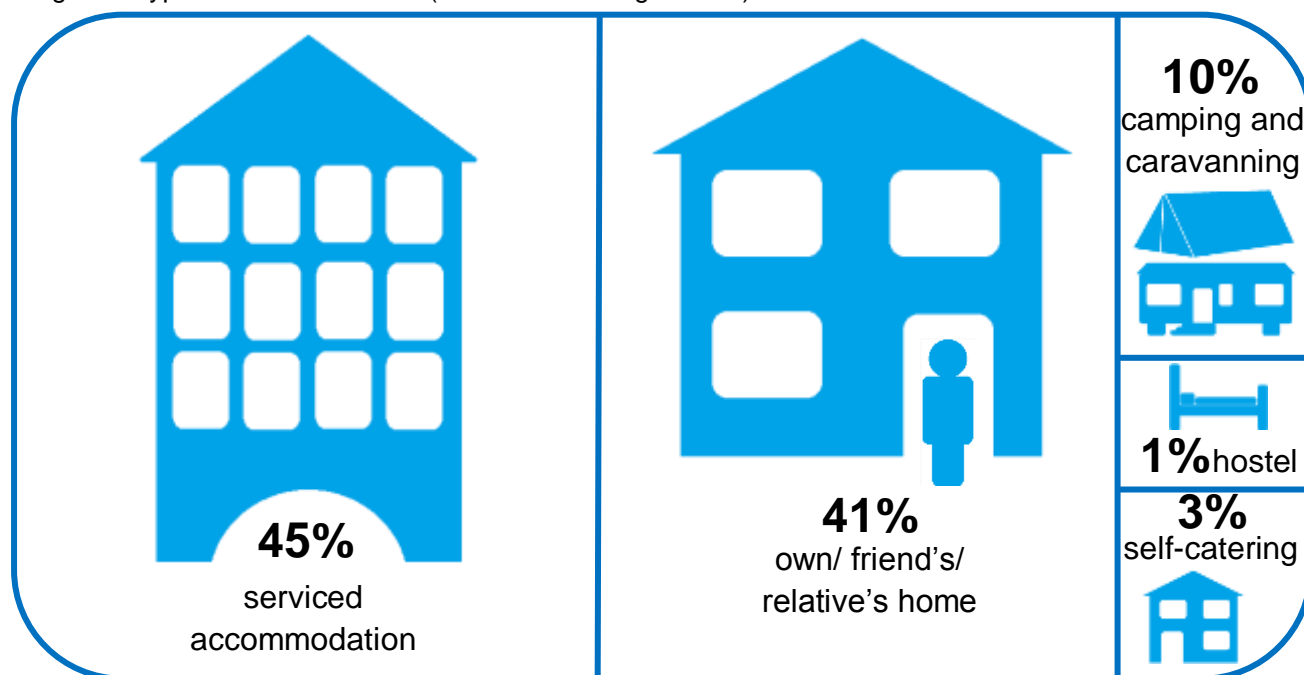
Region of Origin	Annual Average Trips (Thousands)	Proportion of all Trips to South East Wales
Scotland	24	1%
Wales	652	29%
North East England	31	1%
North West England / Merseyside	129	6%
Yorkshire / Humberside	89	4%
East Midlands	132	6%
West Midlands	163	7%
East of England	128	6%
London	205	9%
South East England	296	13%
South West England	383	17%

Domestic overnight visitors to South East Wales were more likely than average to be residents of the South of England, London, or Wales. They were less likely to come from the West Midlands or the North-West of England. This also should not be surprising, as this region has major transport links with the south of England; for example, the M4, and the Cardiff to London railway.

### Type of Accommodation

Visitors to South East Wales are more likely to stay in serviced accommodation, which would fit with the character of the region as more urban, and are also more likely to stay in a house belonging to themselves, a friend, or a family member, which would fit with the higher proportion of visits to friends and family in this region.

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



## 2. International Visits

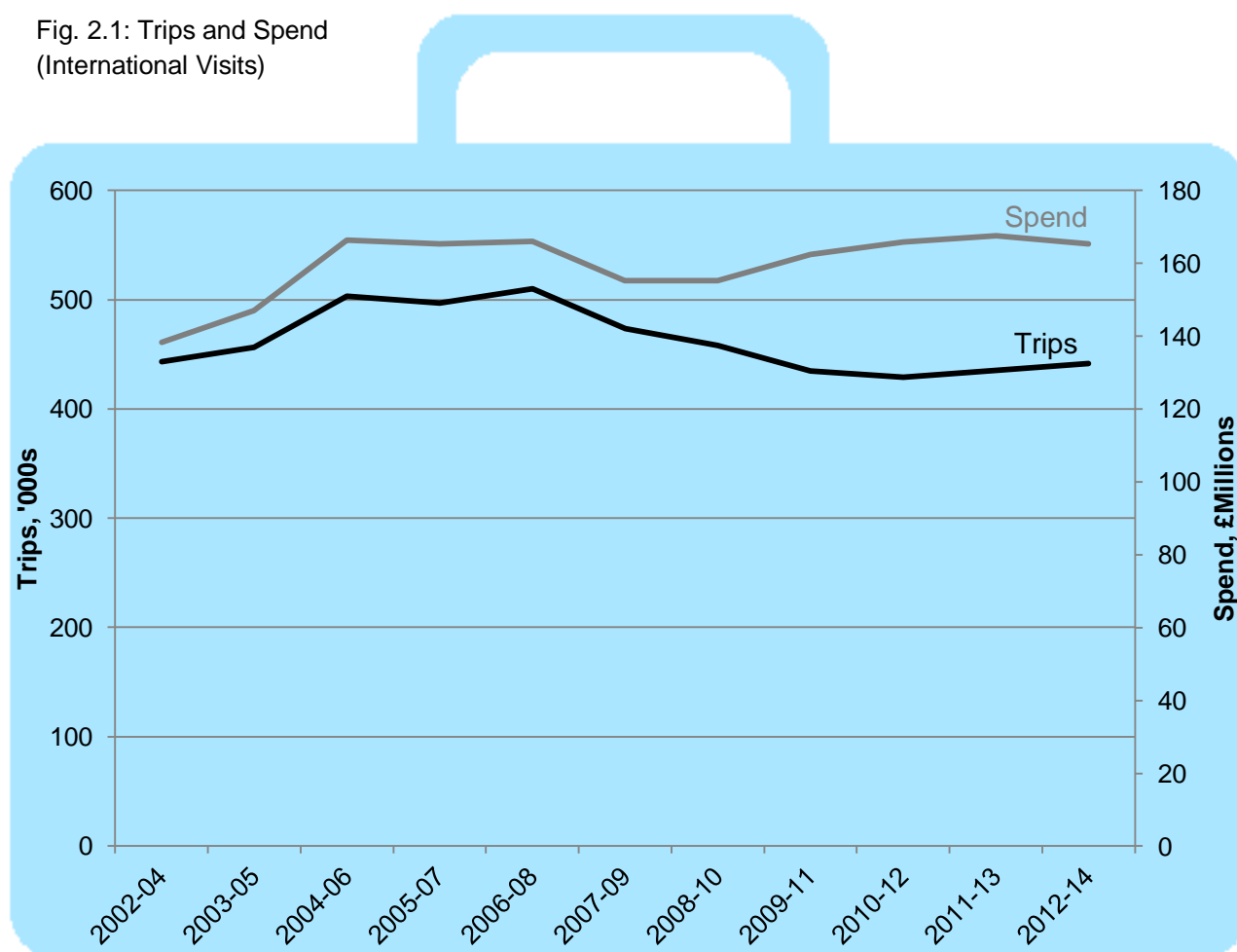
Data in this section come from the International Passenger Survey. Unless otherwise stated, results are for the years 2010-14.

Before the financial crash, international visits to South East Wales were climbing, reaching a peak of 510,000 visits per year in the years 2006-08, but numbers then declined. However, recent years have seen a slight improvement, and in 2012-14, there were 441,000 visits per year, very similar to the figure of 443,000 in 2002-04.

Spend on international visits has increased, from an average of £138 million per year in 2002-04, to £165 million in 2012-14.

This region sees more international visitors than any other part of Wales, with half of all international visits to Wales in 2012-14 being to this region. The spend on international visits in this region is also high; 47% of all spend on international visits to Wales was spent in this region in 2012-14.

Fig. 2.1: Trips and Spend  
(International Visits)

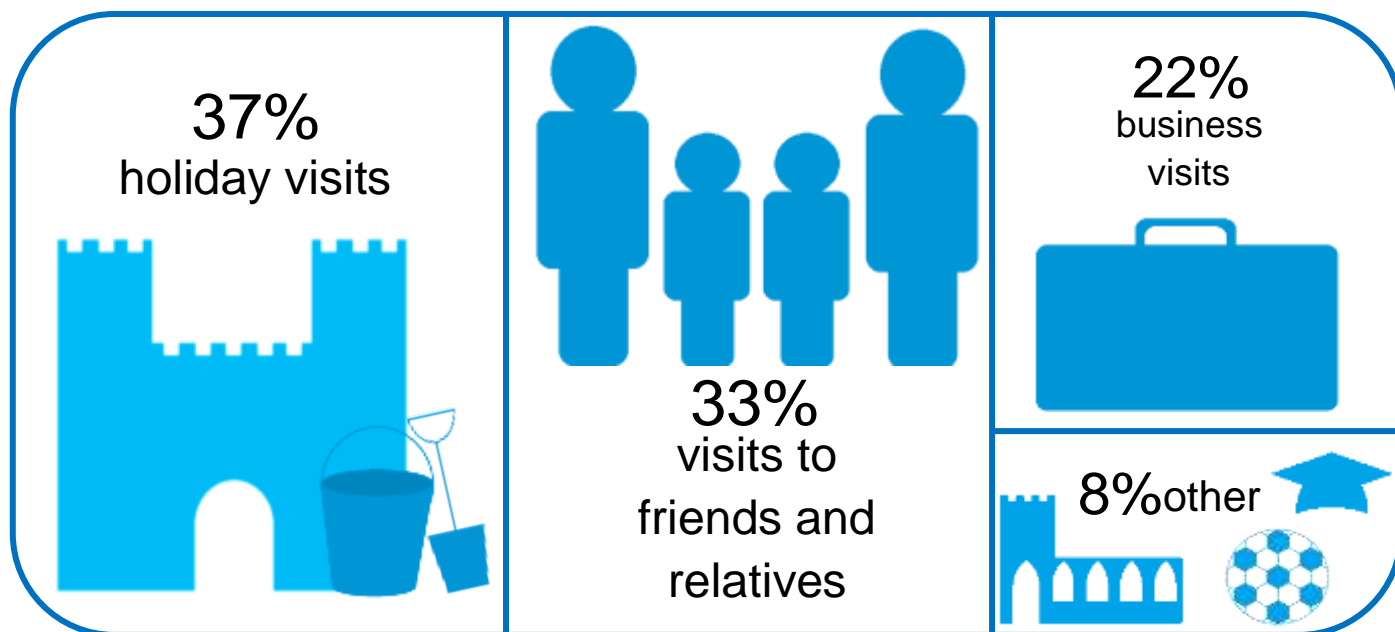




### Purpose of Visit

As was the case for domestic overnight visits, there were higher proportions of business visits this region than in Wales as a whole, and lower proportions of holiday visits; however this trend was not as pronounced in international visits.

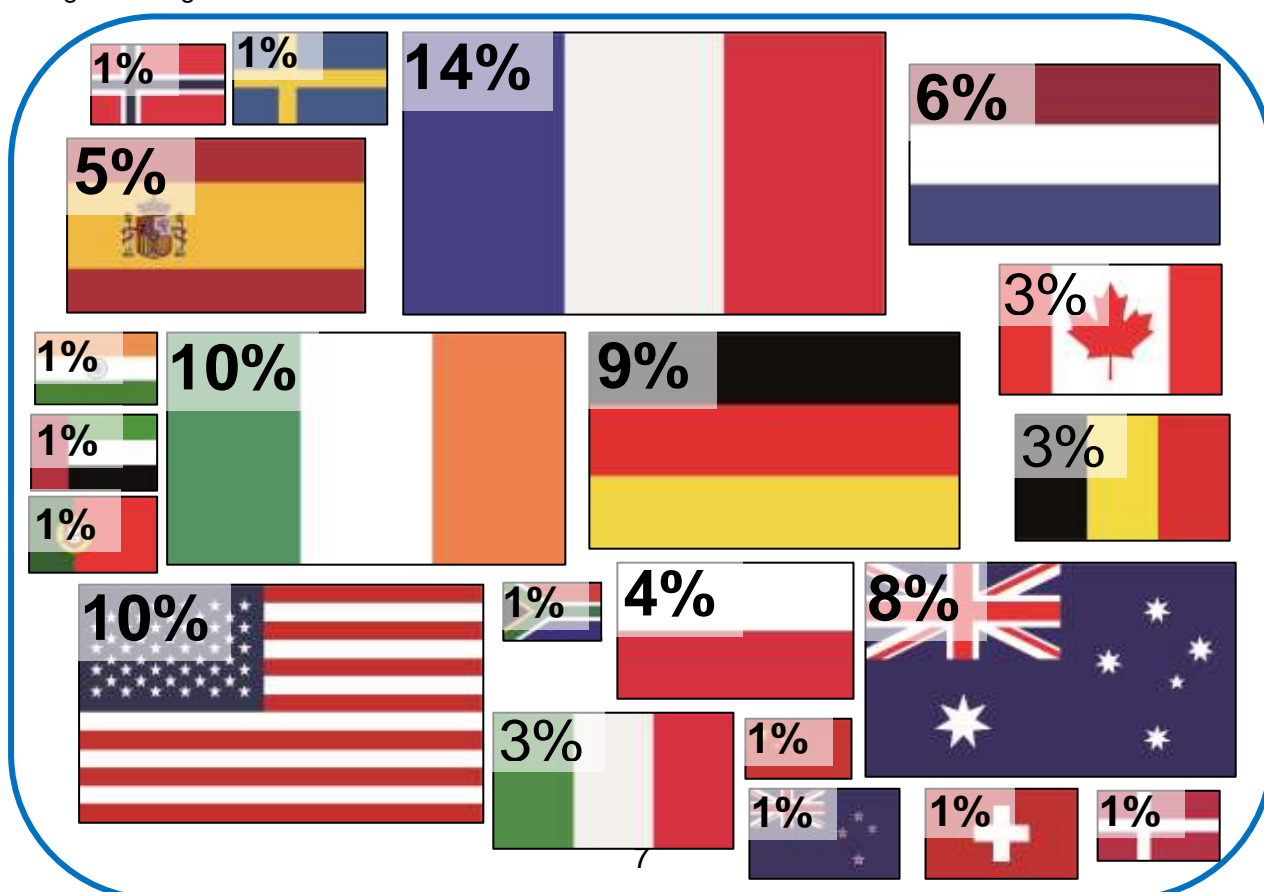
Fig. 2.2: Purpose of Trip (International Visits)



### Country of Origin

The most common country of origin for visitors to South East Wales was France, unlike the rest of the Welsh regions, where the most common country of origin was the Republic of Ireland.

Fig. 2.3: Origin of International Visits



### 3. Day Visits

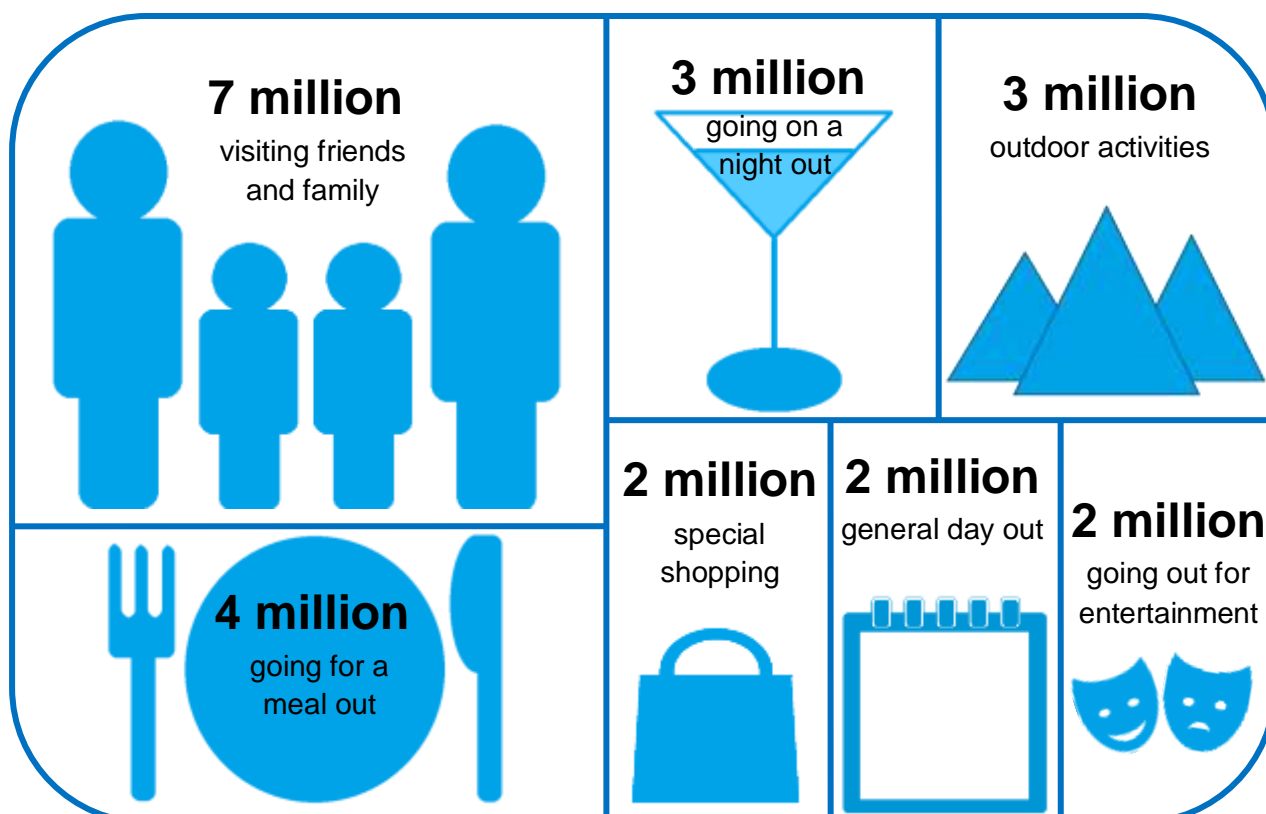
Data in this section come from the GB Day Visits Survey, unless otherwise stated. Unless otherwise stated, results are 2014 only.

On average over the year 2011-14, there were 39 million day visits to South East Wales per year, with an associated annual spend of £1454 million, making this by far the most popular region in Wales for day visits, accounting for over 40% of all day visits to Wales. The popularity of this region is not surprising as day visits are most commonly made by residents of the region, and this region is by far the most densely populated of the Welsh tourism regions.

#### Activity Undertaken

The most popular activity undertaken on day visits to South East Wales was visiting friends and family, which was the most popular activity in most regions of Wales.

Fig. 3.1: Common Day Visit Activities

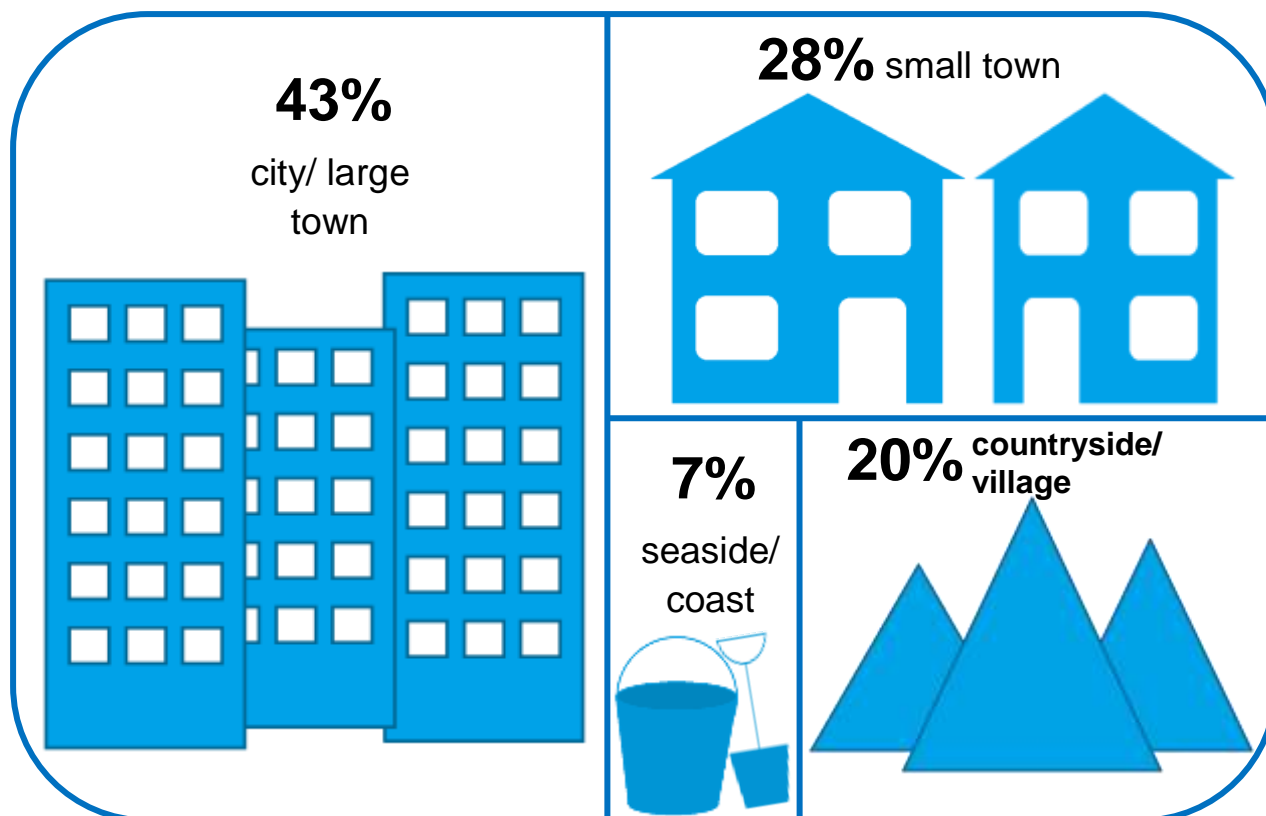


All activities undertaken on at least 2 million visits

#### Destination Type

The most likely destination for a day visit to South East Wales was a city or large town, with 43% of all day visits being to this type of location. Compared with the other Welsh regions, visitors to South East Wales were considerably less likely to visit the seaside or coast, or the countryside or a village. This is probably because of the more urban nature of the region, which makes it more likely that a day visit will be to an urban location.

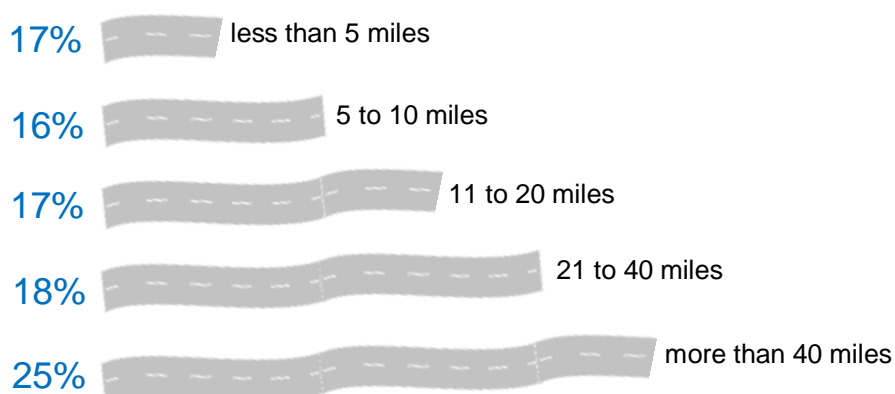
Fig. 3.2: Type of Place Visited (Day Visits)



### Distance Travelled

This region had the smallest proportion of day visitors travelling long distances (over 40 miles) of all the Welsh regions. This fits with the more densely populated and urban character of the region, although it should be noted that a large proportion of day visits did still involve travelling considerable distances, with a quarter involving travel of over 40 miles.

Fig. 3.3: Distance Travelled (Day Visits)



### Origin of Visit

The vast majority of day visits to South East Wales originated within the region, with over two-thirds of all visits to this region originating within the region. This would also fit with the smaller proportion of long journeys observed in this region.

Table 3.1: Region of Origin (Day Visits)

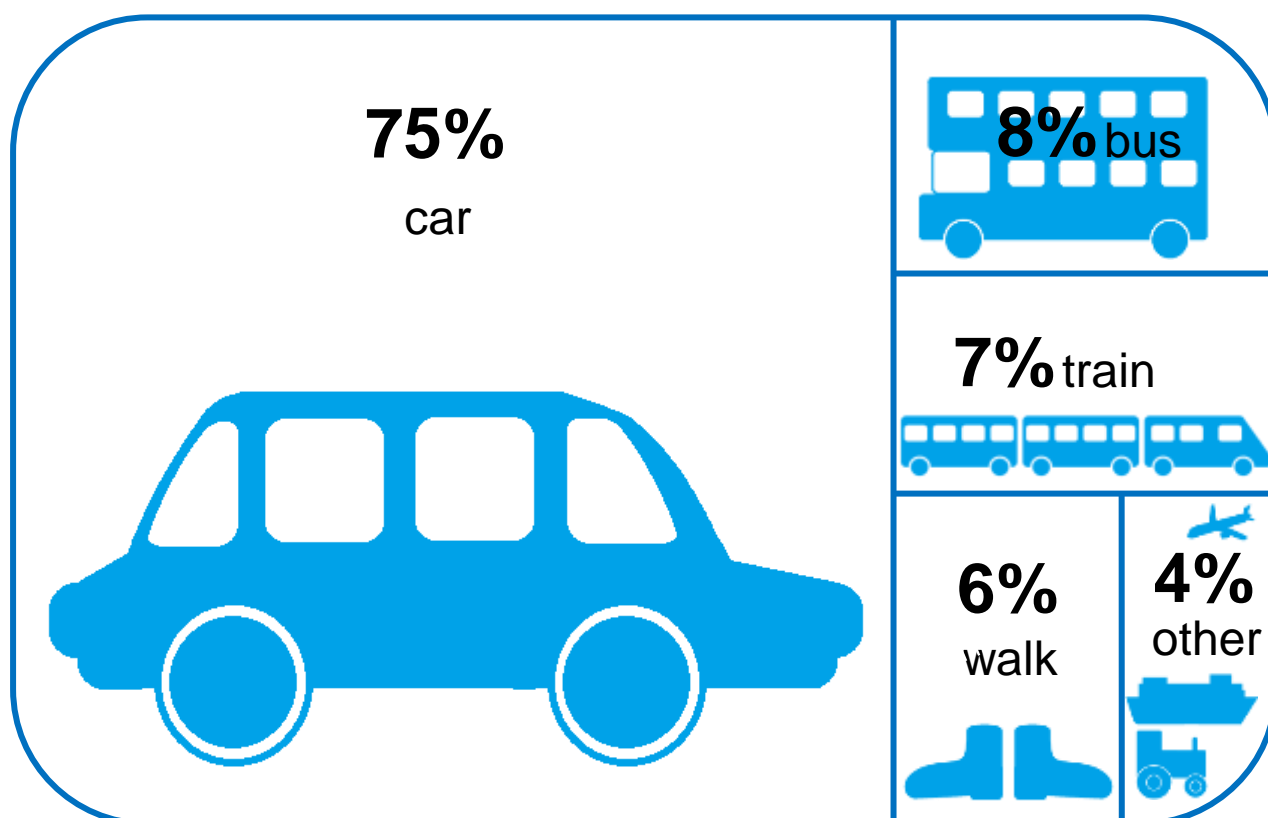
Region of Origin	Number of Visits, Millions
Mid Wales	1
South West Wales	3
South East Wales	23
North West England / Merseyside	1
West Midlands	1
South East England	2
South West England	1

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

### Transport Used

As was the case for all Welsh tourism regions, the majority of day visits to South East Wales were undertaken using a car. This was also the region with the highest proportion of use of buses for day visit transport, possibly because there is more bus transport available in this region.

Fig. 3.4: Mode of Transport (Day Visits)

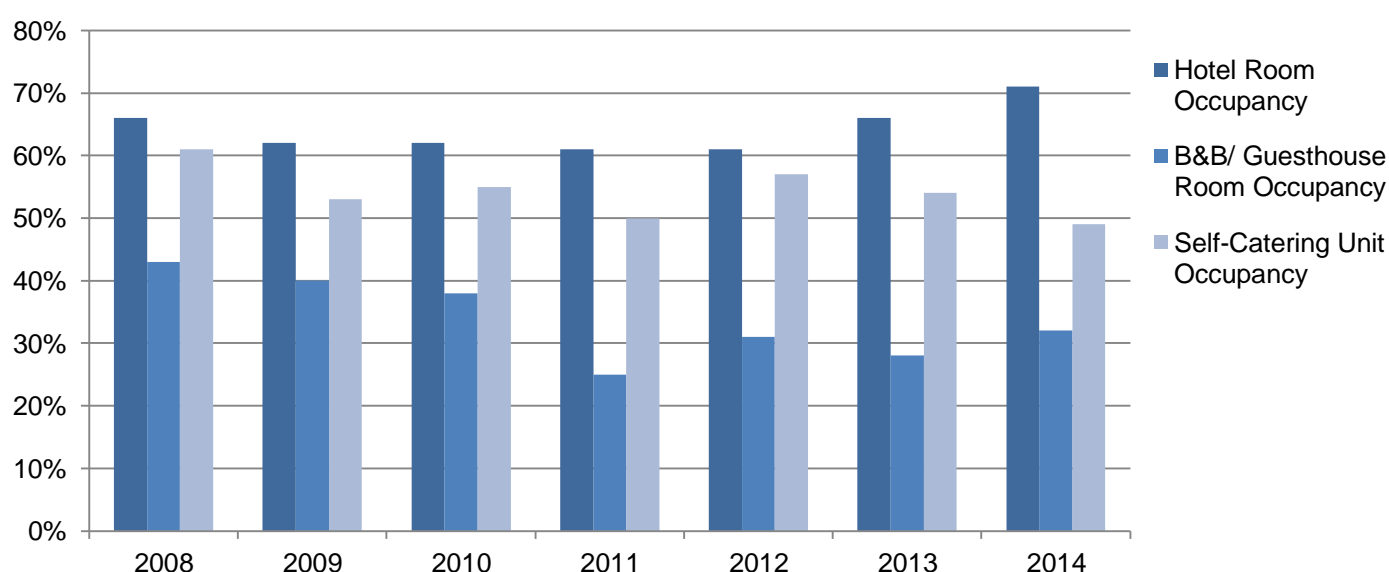


## 4. Accommodation Occupancy

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

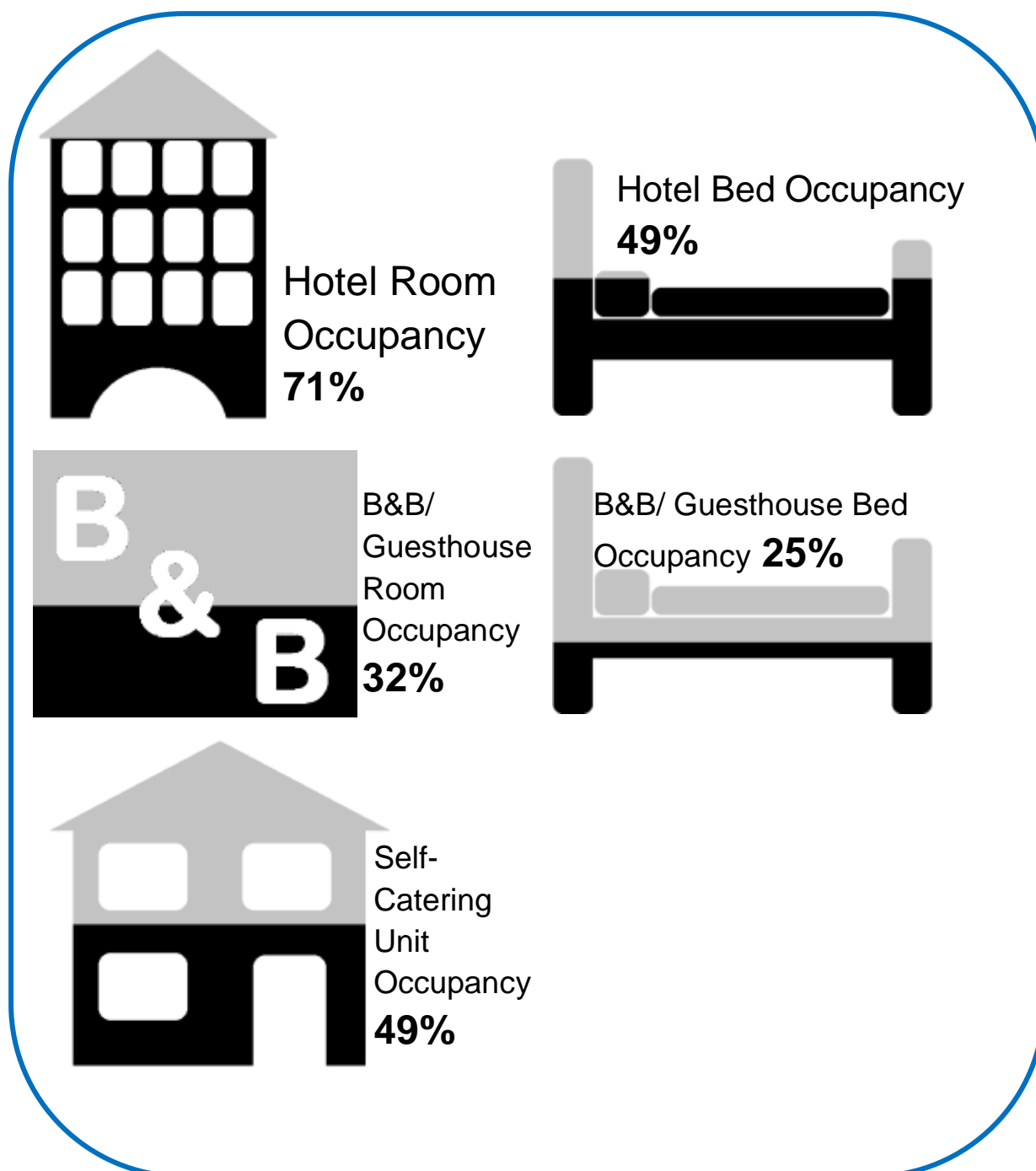
Hotel room occupancy is higher in South East Wales than in any other tourism region, although the hotel bed occupancy rate is only average. This could be connected to the higher proportion of business travellers in this region, who are more likely to be travelling alone. Although B&B/Guesthouse room occupancy is still relatively low, it is slightly higher in this region than the Wales average. The general trend for both hotel and B&B room occupancy seems to show a decline until about 2011, followed by a recovery. Self-catering unit occupancy rates do not follow a particularly clear trend, but do appear to have been declining for the last few years.

Fig. 4.1: Accommodation Occupancy



Note: Hostel bed occupancy figures are not currently available for this region.

Fig. 4.2 Occupancy Rate, 2014

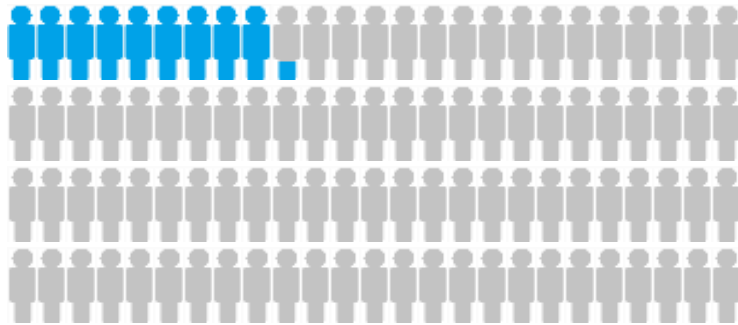


## 5. Employment

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

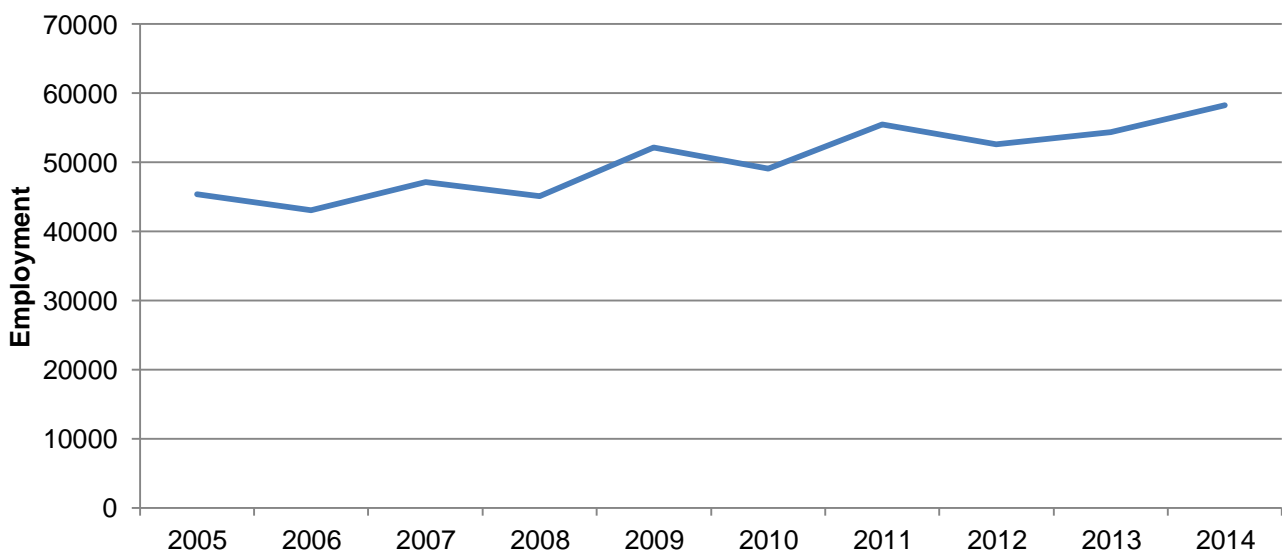
The proportion of jobs in the tourism sector in South East Wales is 9.2%, very similar to the Wales average. This means that about one in eleven jobs in this region is in the tourism sector.

Fig. 5.1: Employment in Tourism



Both the absolute number of jobs in the sector and the proportion of all jobs which are in this sector have risen over the last ten years.

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.

Only 9% of tourism bedspaces available in Wales are in the South East region, with nearly half of these in the serviced sector, a far higher proportion than in any other region of Wales. There is also a higher proportion of hostel bedspaces, but lower proportions of self-catered bedspaces and caravan and camping bedspaces are available.

The amount of bedspace available varies by local authority, with Cardiff providing the most, and Blaenau Gwent the least. Cardiff has a particularly large amount of serviced bedspaces available, with 14% of all serviced bedspaces available in Wales being provided in Cardiff, more than in any other local authority except Conwy.

Fig. 6.1: All Tourism Bedstock

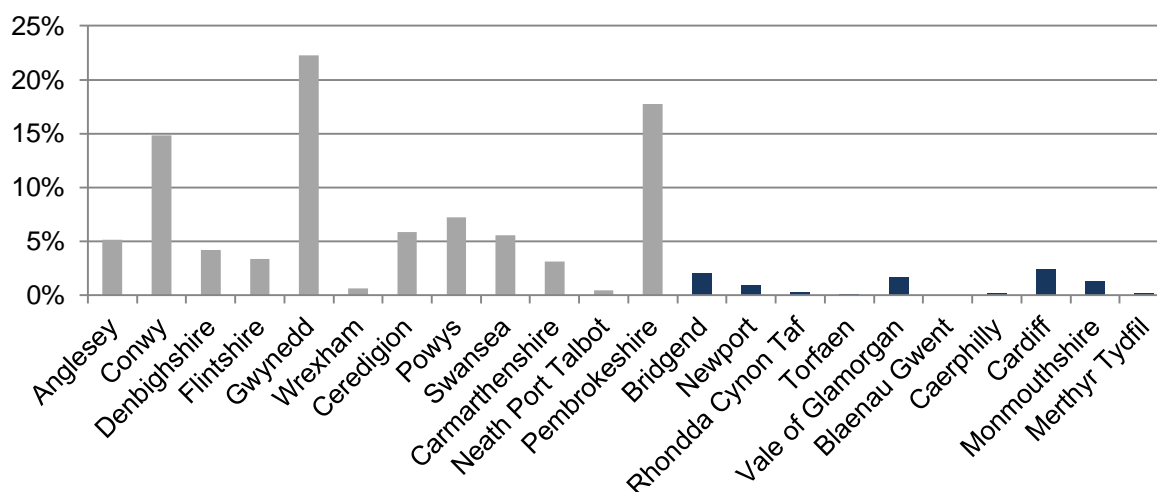


Fig. 6.2: Serviced Bedstock

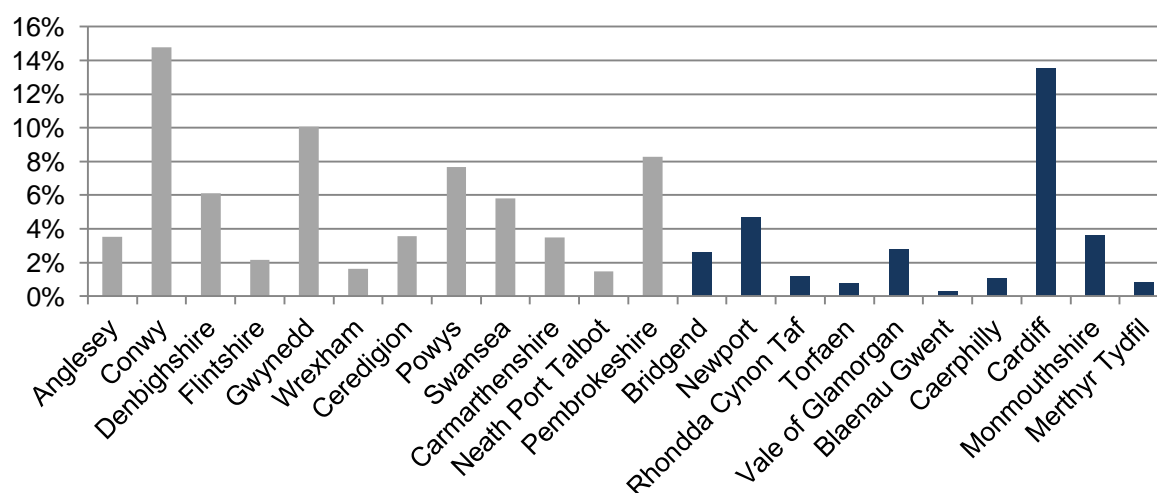




Fig. 6.3: Self-Catering Bedstock

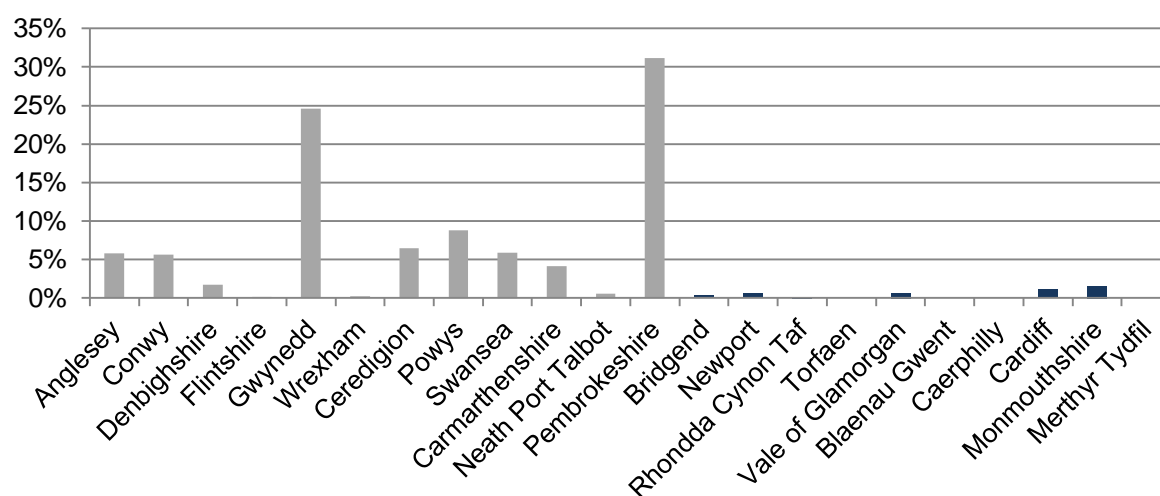


Fig. 6.4: Camping/Caravanning Bedstock

