

SOCIAL RESEARCH NUMBER: 24/2021

PUBLICATION DATE: 19/03/2021

# Tourism Profile – South East Wales 2017 - 2019

Title: Tourism Profile – South East Wales 2017 - 2019

Subtitle: Summary of tourism trends for the South East Wales region

ISBN 978-1-80195-050-3

Researcher: Jennifer Velu

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

For further information, please contact:

Tourism Research

Visit Wales

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

0300 025 5771

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

This report contains tourism-related data for the South East Wales region for the period 2017-2019 providing comparisons with the overall GB level, all-Wales level and the other regions of Wales. Please refer to the other three Wales regional tourism profiles also and the local authority profile for comparative information.

Following the advice of the Office for National Statistics, in order to maximise statistical robustness, figures are presented as annual averages over 3 years. 2019 is the most recent year for which we have detailed data at this level of geography and so the profiles contain the most up-to-date information currently available.

The profiles contain tables on domestic overnight, international overnight and domestic day visitors to Wales, and accommodation occupancy rates.

## Table of Contents

|                                                  |           |
|--------------------------------------------------|-----------|
| <b>1. Overview and Key Points .....</b>          | <b>5</b>  |
| <b>2. Overnight Domestic GB Visitors.....</b>    | <b>10</b> |
| Volume of Trips and Related Expenditure .....    | 11        |
| Average Number of Nights per Trip.....           | 13        |
| Purpose of Trip.....                             | 13        |
| Duration of Holiday Trips .....                  | 14        |
| Lifestage of Holiday Trips .....                 | 15        |
| Seasonality of Trips .....                       | 16        |
| Type of Place Visited.....                       | 16        |
| Type of Accommodation Used on Trip.....          | 18        |
| Region of Origin.....                            | 20        |
| <b>3. International Visitors to Wales.....</b>   | <b>21</b> |
| Volume of Visits and Related Expenditure .....   | 22        |
| Average Spend per Visit .....                    | 23        |
| Average Number of Nights per Visit.....          | 24        |
| Purpose of Trip.....                             | 24        |
| Country of Origin .....                          | 27        |
| <b>4. Tourism Day Visits .....</b>               | <b>27</b> |
| Tourism Day Visits and Related Expenditure ..... | 28        |
| Average Spend per Visit .....                    | 29        |
| Activities Undertaken .....                      | 30        |
| Type of Place Visited .....                      | 30        |
| Mode of Transport Used .....                     | 31        |
| Distance Travelled.....                          | 32        |
| <b>5. Accommodation Occupancy Rates .....</b>    | <b>33</b> |
| Hotels.....                                      | 33        |
| Guesthouses and B&Bs.....                        | 34        |
| Self-Catering .....                              | 34        |
| Static Caravan and Holiday Homes .....           | 35        |
| Hostels.....                                     | 35        |
| <b>6. Further Resources .....</b>                | <b>36</b> |
| <b>7. Appendix .....</b>                         | <b>37</b> |

## 1. Overview and Key Points



### All tourism

In 2017-2019 an annual average of 2.3 million overnight domestic GB trips, 525,000 international visits and 37.7 million Tourism Day visits were made to South East Wales, with an average annual associated spend of £2.2 billion.

South East Wales received 23 per cent of overnight domestic trips, 50 per cent of international visits and 40 per cent of Tourism Day visits to Wales. Expenditure on tourism visits in South East Wales accounted for 35 per cent of tourism expenditure in Wales.

The annual average for tourism expenditure in South East Wales fell by 6 per cent from £2.30 billion in 2016-2018 to £2.17 billion in 2017-2019. In comparison, related tourism expenditure for Wales fell by 2 per cent to £6.21 billion. Please refer to [Table 1.0](#)

### Overnight Domestic GB Visitors

South East Wales saw a 2 per cent increase in the annual average volume of overnight domestic GB trips to 2.3 million between 2016-2018 and 2017-2019, whereas for Wales overall trip volume increased by 5 per cent to 9.9 million. However, related expenditure on overnight domestic trips in South East Wales increased by 5 per cent over the same period, closer to the increase seen in Wales on average, of 6 per cent. Please refer to [Table 1.1](#)

### Domestic GB Tourism Day Visits

The volume of Tourism Day visits in South East Wales fell by 3 per cent between 2016-2018 and 2017-2019 to 37.7 million trips, whilst for Wales overall trip numbers decreased by 5 per cent. Related expenditure in South East Wales fell by 11 per cent over the same period from £1.74 billion to £1.55 billion, a larger fall than the 5 per cent fall seen across Wales on average. Please refer to [Table 1.3](#)

### International Visits to Wales

The volume of international visits to South East Wales remained level in 2017-2019 compared with 2016-2018 at 525,000, whilst the volume of international trips to Wales overall fell slightly by 2 per cent. Over the same period, associated spending by international visitors to South East Wales rose by 14 per cent to £224 million well above the increase seen for Wales overall of 1 per cent. Please refer to [Table 1.2](#)

## Expenditure on tourism visits to South East Wales fell by more than for Wales overall

**Table 1.0 Expenditure (£ millions) by Three Year Averages for Overnight GB Domestic Trips, International Visits and Tourism Day Visits**

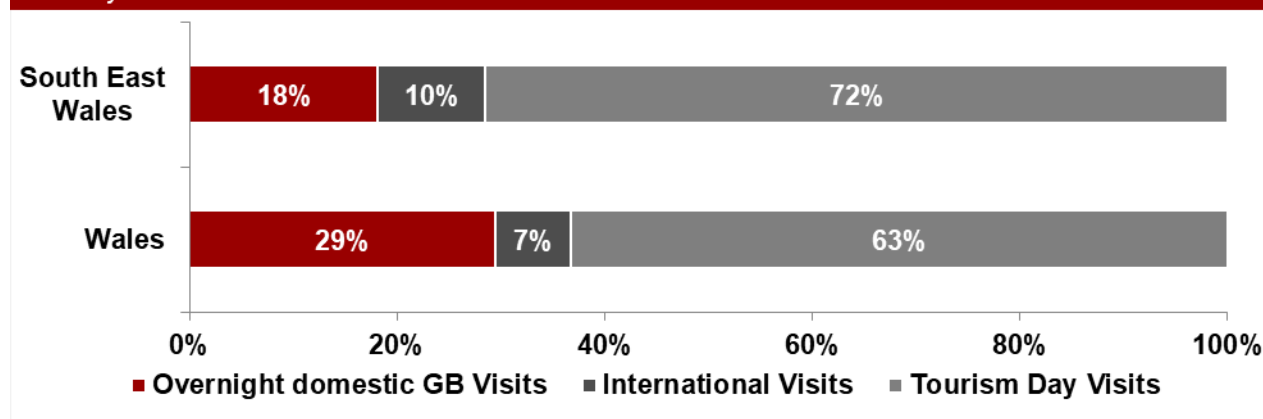
*Sources: Great Britain Tourism Survey, International Passenger Survey, Great Britain Day Visit Survey*

|                         | Spend (£ millions) |                        |               |                        |            |
|-------------------------|--------------------|------------------------|---------------|------------------------|------------|
|                         | 2016-2018          | % share of expenditure | 2017-2019     | % share of expenditure | % change   |
| GB                      | £113,583           |                        | £116,138      |                        | 2%         |
| Wales                   | £6,315             | 100%                   | £6,206        | 100%                   | -2%        |
| North Wales             | £1,636             | 26%                    | £1,474        | 24%                    | -10%       |
| Mid Wales               | £755               | 12%                    | £994          | 16%                    | 32%        |
| <b>South East Wales</b> | <b>£2,304</b>      | <b>36%</b>             | <b>£2,167</b> | <b>35%</b>             | <b>-6%</b> |
| South West Wales        | £1,282             | 20%                    | £1,237        | 20%                    | -4%        |

Associated expenditure on tourism visits to South East Wales in 2017-2019 decreased by 6 per cent from £2.3 billion to £2.2 billion, whilst tourism expenditure for Wales overall fell by just 2 per cent to £6.2 billion.

**Figure 1.0 Expenditure in Wales and South East Wales 2017-2019**

*Sources: Great Britain Tourism Survey, International Passenger Survey, Great Britain Day Visit Survey*



In 2017-2019 the proportion of tourism spending from Tourism Day visits in South East Wales was higher than for Wales overall, at 72 per cent compared with 63 per cent. Conversely, the proportion of spending on overnight domestic trips in South East Wales was lower at 18 per cent, than the 29 per cent seen in Wales overall.

**Domestic overnight trips and expenditure to South East Wales increased between 2016-2018 and 2017-2019**

**Table 1.1 Volume of Overnight Domestic GB Trips (millions) and Related Expenditure (£ millions) - Three Year Annual Averages**

*Source: Great Britain Tourism Survey*

| Trips (millions)        |              |                        |              |                        |           |
|-------------------------|--------------|------------------------|--------------|------------------------|-----------|
|                         | 2016-2018    | % share of trips       | 2017-2019    | % share of trips       | % change  |
| GB                      | 119.562      |                        | 120.671      |                        | 1%        |
| Wales                   | 9.451        | 100%                   | 9.914        | 100%                   | 5%        |
| North Wales             | 3.378        | 36%                    | 3.653        | 37%                    | 8%        |
| Mid Wales               | 1.887        | 20%                    | 1.916        | 19%                    | 2%        |
| <b>South East Wales</b> | <b>2.252</b> | <b>24%</b>             | <b>2.307</b> | <b>23%</b>             | <b>2%</b> |
| South West Wales        | 1.862        | 20%                    | 1.939        | 20%                    | 4%        |
| Spend (£ millions)      |              |                        |              |                        |           |
|                         | 2016-2018    | % share of expenditure | 2017-2019    | % share of expenditure | % change  |
| GB                      | £23,574      |                        | £24,098      |                        | 2%        |
| Wales                   | £1,723       | 100%                   | £1,828       | 100%                   | 6%        |
| North Wales             | £626         | 36%                    | £682         | 37%                    | 9%        |
| Mid Wales               | £314         | 18%                    | £335         | 18%                    | 7%        |
| <b>South East Wales</b> | <b>£373</b>  | <b>22%</b>             | <b>£393</b>  | <b>22%</b>             | <b>5%</b> |
| South West Wales        | £374         | 22%                    | £383         | 21%                    | 2%        |

South East Wales saw an increase in the number of domestic overnight trips in 2017-2019 though at a lower rate than for Wales on average (2 per cent compared with 5 per cent). However, related spending in South East Wales increased by 5 per cent, closer to the 6 per cent increase seen for Wales overall.

**Volume of International overnight trips to South East Wales remained level, whilst associated expenditure shows strong growth**

**Table 1.2 Volume of International Visits (millions) and Related Expenditure (£ millions) - Three Year Averages**

*Source: International Passenger Survey*

| Trips (millions)        |              |                        |              |                        |            |
|-------------------------|--------------|------------------------|--------------|------------------------|------------|
|                         | 2016-2018    | % share of trips       | 2017-2019    | % share of trips       | % change   |
| GB                      | 40.164       |                        | 40.740       |                        | 1%         |
| Wales                   | 1.060        | 100%                   | 1.041        | 100%                   | -2%        |
| North Wales             | 0.303        | 29%                    | 0.299        | 29%                    | -1%        |
| Mid Wales               | 0.107        | 10%                    | 0.099        | 10%                    | -7%        |
| <b>South East Wales</b> | <b>0.525</b> | <b>50%</b>             | <b>0.525</b> | <b>50%</b>             | <b>0%</b>  |
| South West Wales        | 0.198        | 19%                    | 0.187        | 18%                    | -5%        |
| Spend (£ millions)      |              |                        |              |                        |            |
|                         | 2016-2018    | % share of expenditure | 2017-2019    | % share of expenditure | % change   |
| GB                      | £26,631      |                        | £27,637      |                        | 4%         |
| Wales                   | £446         | 100%                   | £448         | 100%                   | 1%         |
| North Wales             | £90          | 20%                    | £89          | 20%                    | -1%        |
| Mid Wales               | £54          | 12%                    | £31          | 7%                     | -43%       |
| <b>South East Wales</b> | <b>£196</b>  | <b>44%</b>             | <b>£224</b>  | <b>50%</b>             | <b>14%</b> |
| South West Wales        | £95          | 21%                    | £92          | 20%                    | -4%        |

The volume of international visits to South East Wales remained level in 2017-2019 compared with 2016-2018, whilst the volume of international trips to Wales overall fell slightly by 2 per cent. Over the same period, associated spending by international visitors to South East Wales rose by 14 per cent, the largest rise of all regions and well above the increase seen in Wales on average of 1 per cent.



Tourism Day visits and expenditure in South East Wales decreased between 2016-2018 and 2017-2019, as did Wales overall.

**Table 1.3 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) - Three Year Annual Averages**

*Source: Great Britain Day Visits Survey*

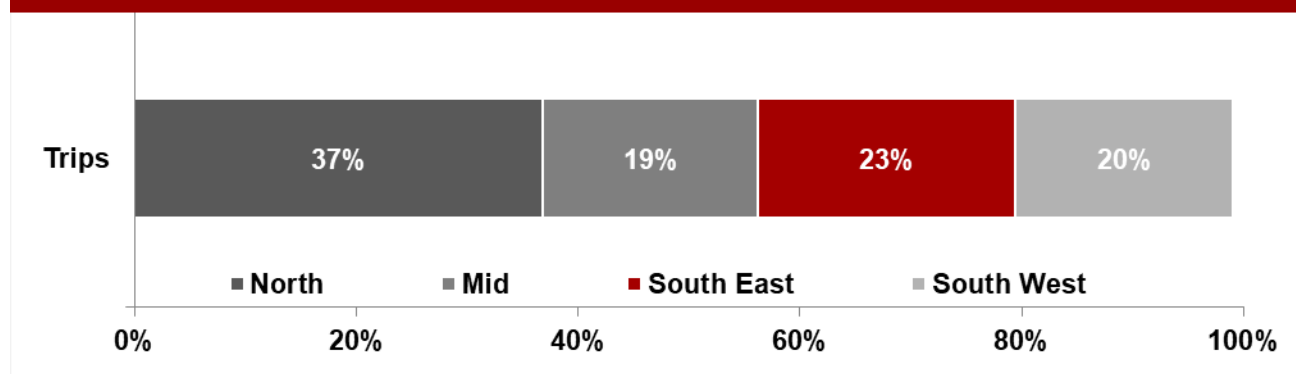
| Trips (millions)        |               |                        |               |                        |             |
|-------------------------|---------------|------------------------|---------------|------------------------|-------------|
|                         | 2016-2018     | % share of trips       | 2017-2019     | % share of trips       | % change    |
| GB                      | 1,776.7       |                        | 1,716.4       |                        | -3%         |
| Wales                   | 99.3          | 100%                   | 94.4          | 100%                   | -5%         |
| North Wales             | 25.0          | 25%                    | 22.7          | 24%                    | -9%         |
| Mid Wales               | 11.0          | 11%                    | 12.3          | 13%                    | 12%         |
| <b>South East Wales</b> | <b>39.0</b>   | <b>39%</b>             | <b>37.7</b>   | <b>40%</b>             | <b>-3%</b>  |
| South West Wales        | 24.3          | 24%                    | 22.7          | 24%                    | -7%         |
| Spend (£ millions)      |               |                        |               |                        |             |
|                         | 2016-2018     | % share of expenditure | 2017-2019     | % share of expenditure | % change    |
| GB                      | £63,378       |                        | £64,402       |                        | 2%          |
| Wales                   | £4,146        | 100%                   | £3,929        | 100%                   | -5%         |
| North Wales             | £920          | 22%                    | £703          | 18%                    | -24%        |
| Mid Wales               | £388          | 9%                     | £628          | 16%                    | 62%         |
| <b>South East Wales</b> | <b>£1,735</b> | <b>42%</b>             | <b>£1,550</b> | <b>39%</b>             | <b>-11%</b> |
| South West Wales        | £813          | 20%                    | £762          | 19%                    | -6%         |

Whilst the number of Tourism Day visits fell by 3 per cent between 2016-2018 and 2017-2019, for Wales overall the number of trips decreased more – falling by 5 per cent. However, related spending across Wales fell by 5 per cent over the same period, whereas spending in South East Wales fell by 11 per cent.

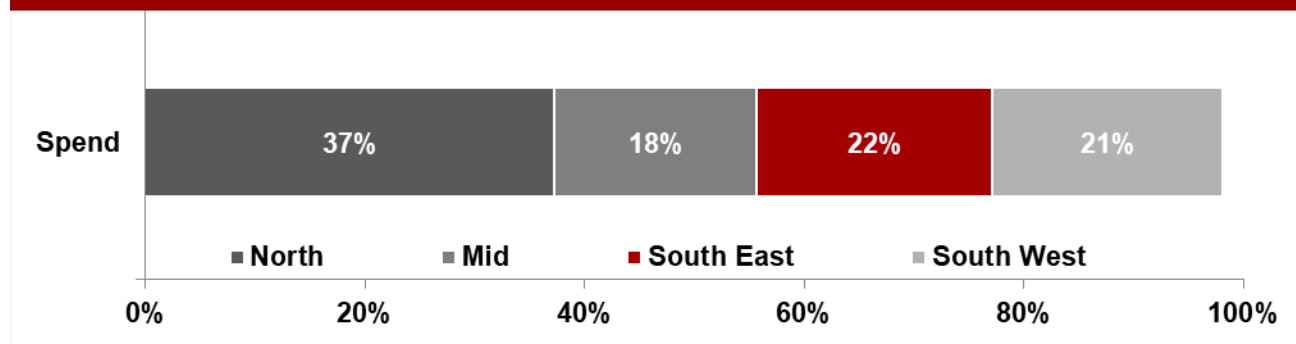
## 2. Overnight Domestic GB Visitors

All the data used for this section has been sourced from the [Great Britain Tourism Survey](#). Figures shown are the annual averages taken over three years, 2017-2019, unless stated otherwise.

**Figure 2.0 Proportion (%) of Overnight Domestic GB Trips to Wales by Welsh Region – Three Year Average Annual 2017-2019**  
*Source: Great Britain Tourism Survey*



**Figure 2.1 Proportion (%) of Overnight Domestic GB Related Expenditure in Wales by Welsh Region – Three Year Average Annual 2017-2019**  
*Source: Great Britain Tourism Survey*

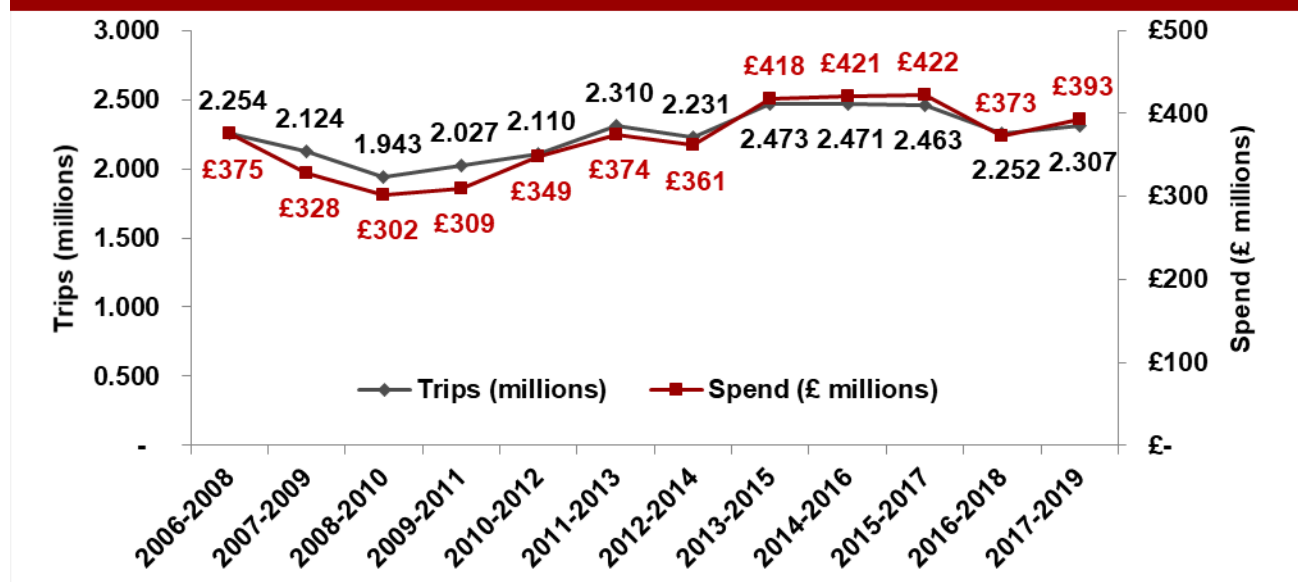


Over the period of 2017-2019, South East Wales received an annual average 2.3 million overnight domestic GB trips per year. During this period these visitors spent an annual average of £393 million. South East Wales received nearly a quarter (23 per cent) of all overnight domestic GB trips to Wales, and 22 per cent of related spending, making it the second most popular Welsh region, after North Wales, for this kind of tourism. The regional share of overnight domestic visitors is broadly consistent over the longer term.

## Volume of Trips and Related Expenditure

**Figure 2.2 Overnight Domestic GB Trips (millions) and Related Expenditure (£ millions) to South West Wales - Three Year Annual Averages**

Source: Great Britain Tourism Survey

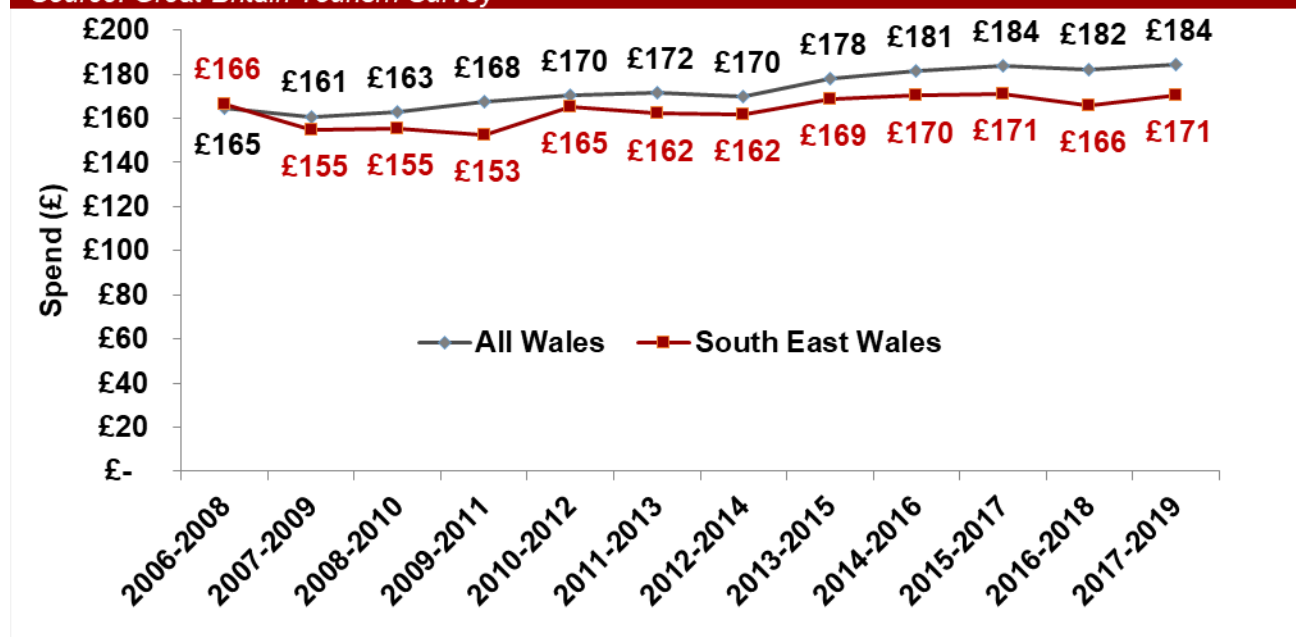


Over time, the volume of overnight domestic trips and related expenditure in South East Wales have tended to fall and increase in parallel. Following a sharp fall in 2016-2018, both volume of trips and associated spend recovered slightly to reach an annual average of 2.3 million trips and £393 million in associated spending in 2017-2019.

## Average Spend per Trip

**Figure 2.3 Average Spend per Overnight Domestic GB Trip (£) to Wales and South East Wales - Three Year Annual Averages**

Source: Great Britain Tourism Survey

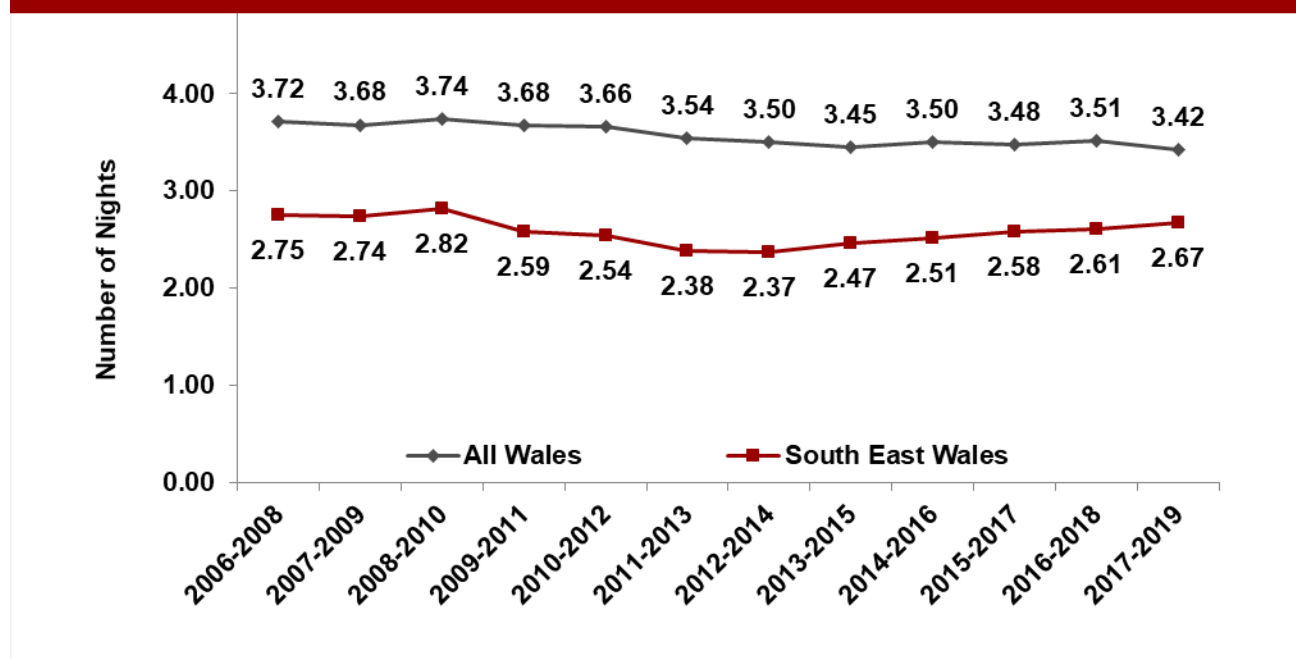


The average spend per overnight domestic GB trip to South East Wales has been consistently below the all Wales average since 2006-2008, though average trip length has also been consistently below the Wales average (see [Figure 2.3](#)). Between 2016-2018 and 2017-2019 the average spend per overnight domestic trip in South East Wales increased from £166 to £171, whilst the average for Wales increased from £182 to £184.

## Average Number of Nights per Trip

**Figure 2.4 Average Numbers of Nights per Overnight Domestic GB Trip to Wales and South East Wales – Three Year Annual Averages**

Source: Great Britain Tourism Survey



The average number of nights per overnight domestic GB trip to South East Wales has consistently been lower than the all Wales average. In 2017-2019, the average number of nights per trip in South East Wales was 2.67 nights, lower than all other regions, while the average for Wales overall was 3.42.

## Purpose of Trip

**Table 2.1 Volume of Overnight Domestic GB Trips (millions) by Purpose of Trip to All Wales and South East Wales – Annual Average 2017-2019**

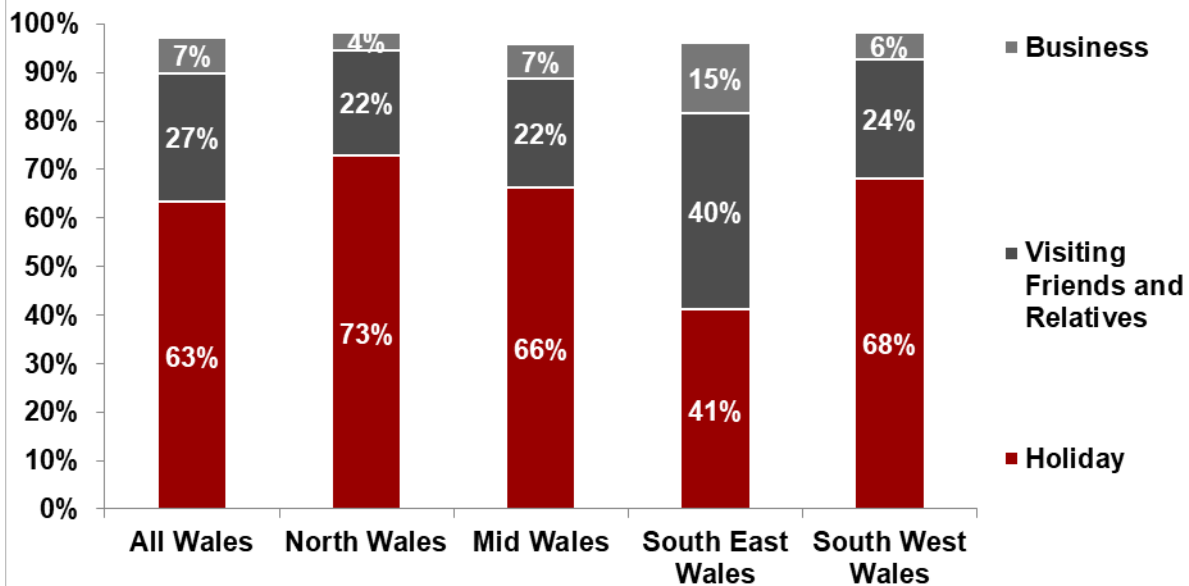
Source: Great Britain Tourism Survey

|                                | All Wales    | South East Wales |
|--------------------------------|--------------|------------------|
| <b>Total Trips</b>             | <b>9.914</b> | <b>2.307</b>     |
| Holiday                        | 6.278        | 0.949            |
| Visiting Friends and Relatives | 2.634        | 0.932            |
| Business                       | 0.723        | 0.338            |

During 2017-2019, only two fifths (41 per cent) of overnight visitors to South East Wales came for a holiday, a smaller proportion than for Wales on average (63 per cent). A further two fifths (40 per cent) of overnight trips in South East Wales were to visit friends or relatives, higher than the Wales average of 27 per cent. Business trips made up 15 per cent of overnight visits in South East Wales, the largest proportion of all Wales regions.

**Figure 2.5 Proportion (%) of Overnight Domestic GB Trips to All Wales and Wales Regions by Purpose of Trip – Annual Average 2017-2019**

Source: Great Britain Tourism Survey

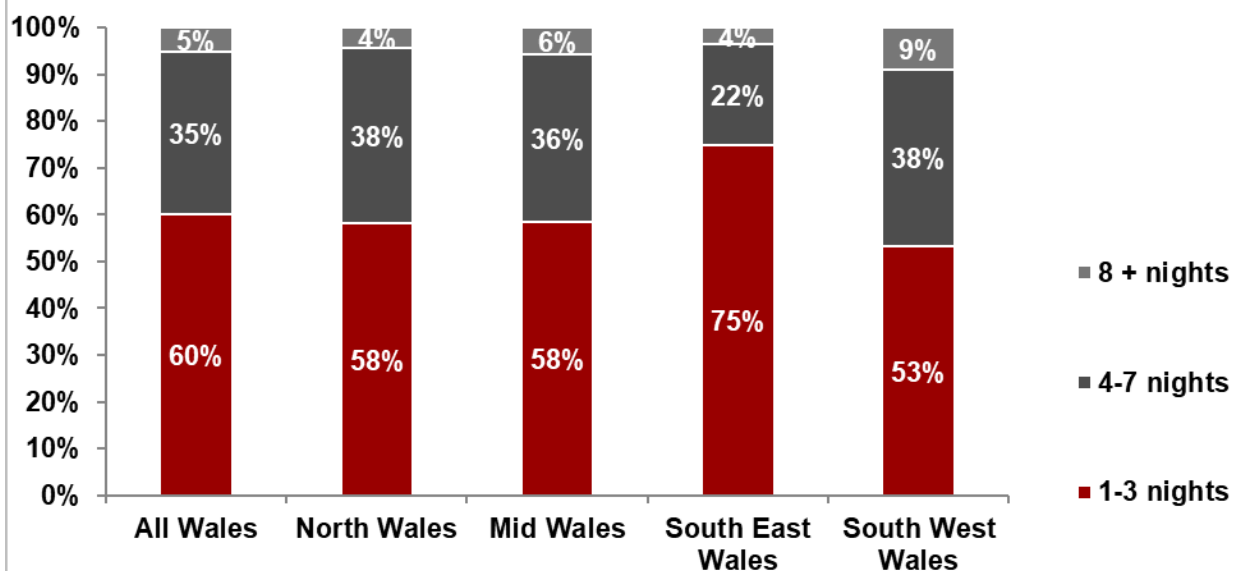


\*Please note that the figures might not add to 100 per cent due to survey participants not answering this question or selecting 'Don't Know'/'Other'.

## Duration of Holiday Trips

**Figure 2.6 Proportion (%) of Overnight Domestic GB Holiday Trips by Duration of Trip to All Wales and Wales Regions – Annual Average 2017-2019**

Source: Great Britain Tourism Survey



\*Please note that the figures might not add to 100 per cent due to survey participants not answering this question or selecting 'Don't Know'/'Other'.

Holiday trips to South East Wales in 2017-2019 were more likely to last 1-3 nights, and less likely to last 4 or more nights, than on average for all holidays in Wales. Three quarters of holiday overnight trips to South East Wales were 1-3 nights, compared to 60 per cent overall for Wales. The distribution of trip duration has been relatively consistent over the past few years.

## Lifestage of Holiday Trips

**Table 2.2 Volume of Overnight Domestic GB Holiday Trips (millions) by Lifestage to All Wales and South East Wales – Annual Average 2017-2019**

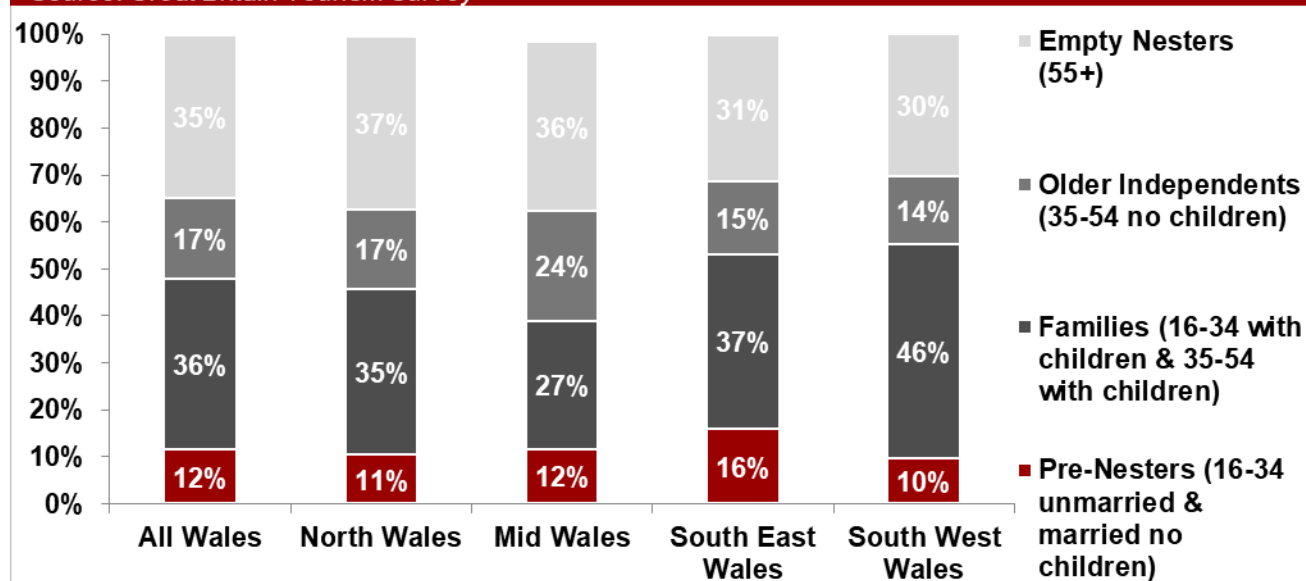
Source: Great Britain Tourism Survey

|                                                      | All Wales    | South East Wales |
|------------------------------------------------------|--------------|------------------|
| <b>Total Holiday Trips</b>                           | <b>6.278</b> | <b>0.949</b>     |
| Pre-Nesters (16-34 unmarried & married no children)  | 0.724        | 0.152            |
| Families (16-34 with children & 35-54 with children) | 2.284        | 0.353            |
| Older Independents (35-54 no children)               | 1.089        | 0.147            |
| Empty Nesters (55+)                                  | 2.169        | 0.295            |

Families made up the largest proportion of holiday visits in South East Wales during 2017-2019, with 37 per cent, followed by Empty Nesters with 31 per cent. The proportions of different lifestages visiting South East Wales for holidays in 2017-2019 are broadly similar to those for Wales overall. However, South East Wales received holiday visits from a lower proportion of Empty Nesters and a higher proportion of Pre-Nesters than the Wales average. This trend has been consistent over the past few years.

**Figure 2.7 Proportion (%) of Overnight Domestic GB Holiday Trips to All Wales and Wales Regions by Lifestage – Annual Average 2017-2019**

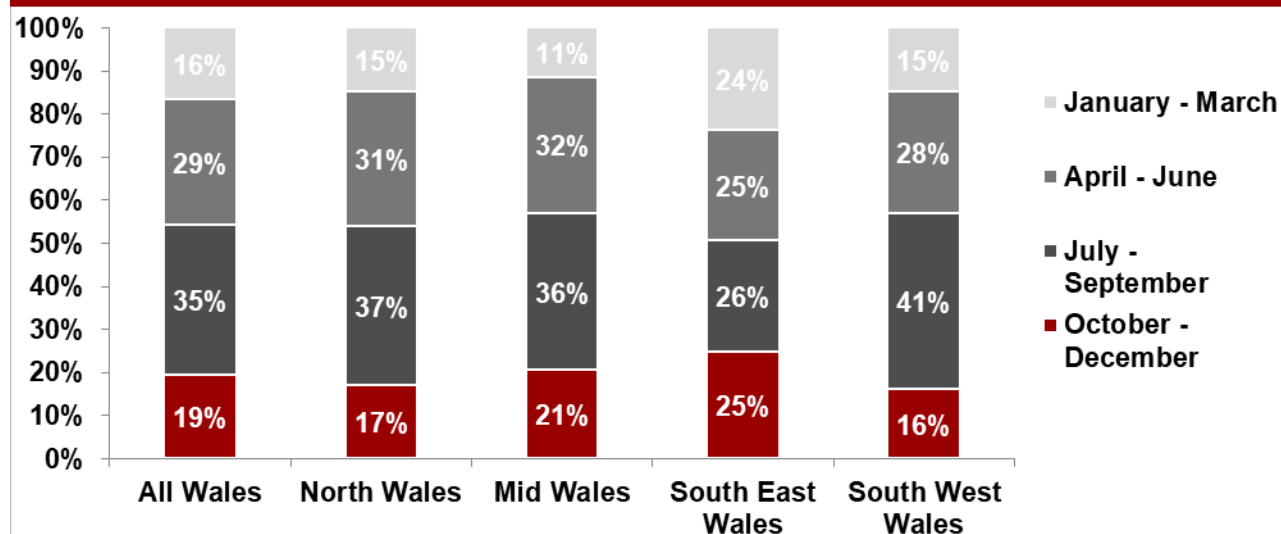
Source: Great Britain Tourism Survey



## Seasonality of Trips

**Figure 2.8 Proportion (%) of Overnight Domestic GB Trips to All Wales and Wales Regions by Season - Annual Average 2017-2019**

Source: Great Britain Tourism Survey



South East Wales is the only Welsh region not to follow a typical high and low seasonal pattern, but shows similar proportions of visitors for each of the four quarters. Compared to Wales overall, South East Wales had a considerably higher proportion of overnight domestic GB trips in 2017-2019 arriving between January and March (24 per cent compared with 16 per cent) and a higher proportion than all Wales for overnight domestic GB trips arriving in October-December (25 per cent and 19 per cent respectively). This is likely to be due to the higher proportion of trips for visiting friends and relatives and for business.

## Type of Place Visited

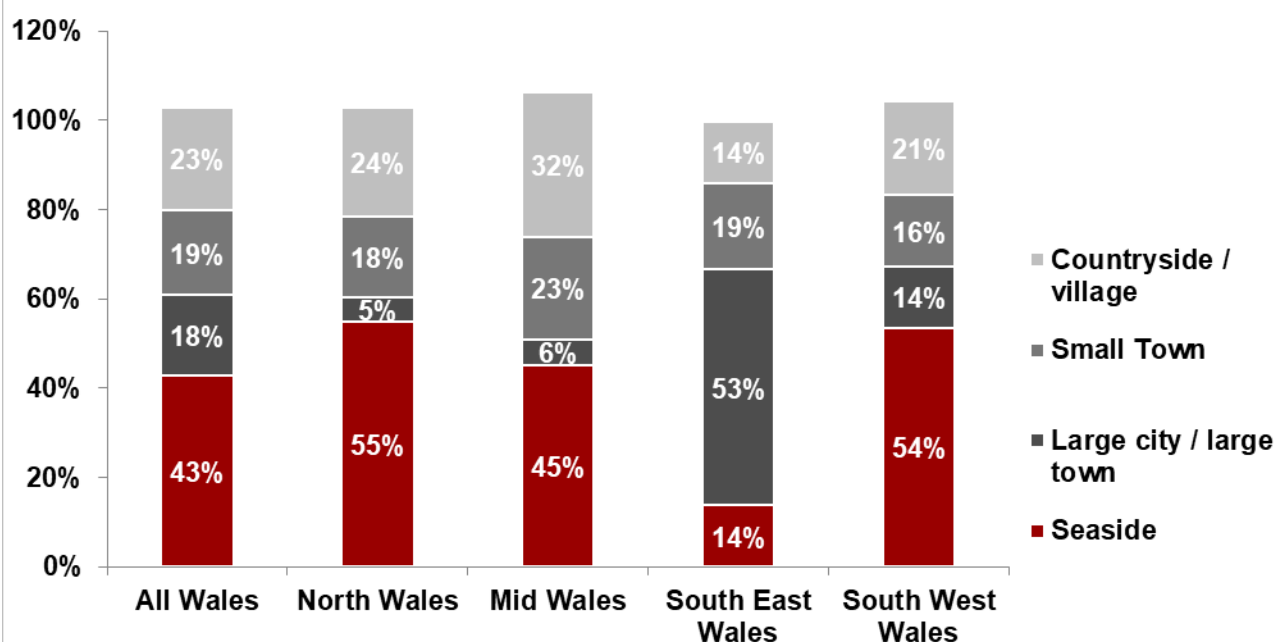
**Table 2.4 Volume of Overnight Domestic GB Trips (millions) by Type of Place Visited to All Wales and South East Wales – Annual Average 2017-2019**

Source: Great Britain Tourism Survey

|                         | All Wales    | South East Wales |
|-------------------------|--------------|------------------|
| <b>Total Trips</b>      | <b>9.914</b> | <b>2.307</b>     |
| Seaside                 | 4.259        | 0.320            |
| Large city / large town | 1.781        | 1.216            |
| Small town              | 1.869        | 0.446            |
| Countryside / village   | 2.293        | 0.321            |



**Figure 2.9 Proportion (%) of Overnight Domestic GB Trips by Type of Place Visited to All Wales and Wales Regions – Annual Average 2017-2019**  
Source: Great Britain Tourism Survey



*\*Please note that the figures might add up to over 100% due to visitors being able to visit more than one Type of Place.*

In 2017-2019 the most popular destination for overnight domestic GB trips to South East Wales was a city or large town with 53 per cent of visits being to this kind of destination. This was a higher proportion than the overall Wales average of 18 per cent, and the largest proportion of any Welsh region.

The least popular destination types for an overnight domestic GB trip to South East Wales in 2017-2019 were countryside and seaside, each receiving just 14 per cent of visits, well below the Wales average of 23 and 43 per cent of visits respectively. South East Wales received the smallest proportion of visits to both countryside and seaside destinations of all four Welsh regions. The proportion visiting a small town was the same (at 19 per cent) among overnight domestic visits to South East Wales as for Wales overall.

It is important to bear in mind that respondents themselves choose how to classify the place they visit and responses are therefore subjective. For example, someone might classify their location as a 'village' and not a 'small town'.

## Type of Accommodation Used on Trip

Please note that overnight domestic GB visitors can stay in more than one type of accommodation during a single trip. Because of this, proportions of total trips by all accommodation types will always add up to more than 100 per cent. Furthermore, only the accommodation types with a large enough sample for analysis across all four Welsh regions have been included in this section.

Please refer to [Table 7.6](#) for a full list of answer options that have been included under each accommodation type to calculate three year averages.

**Table 2.5 Volume of Overnight Domestic GB Trips (millions) by Type of Accommodation Used during a trip to Wales and South East Wales – Annual Average 2017-2019**

*Source: Great Britain Tourism Survey*

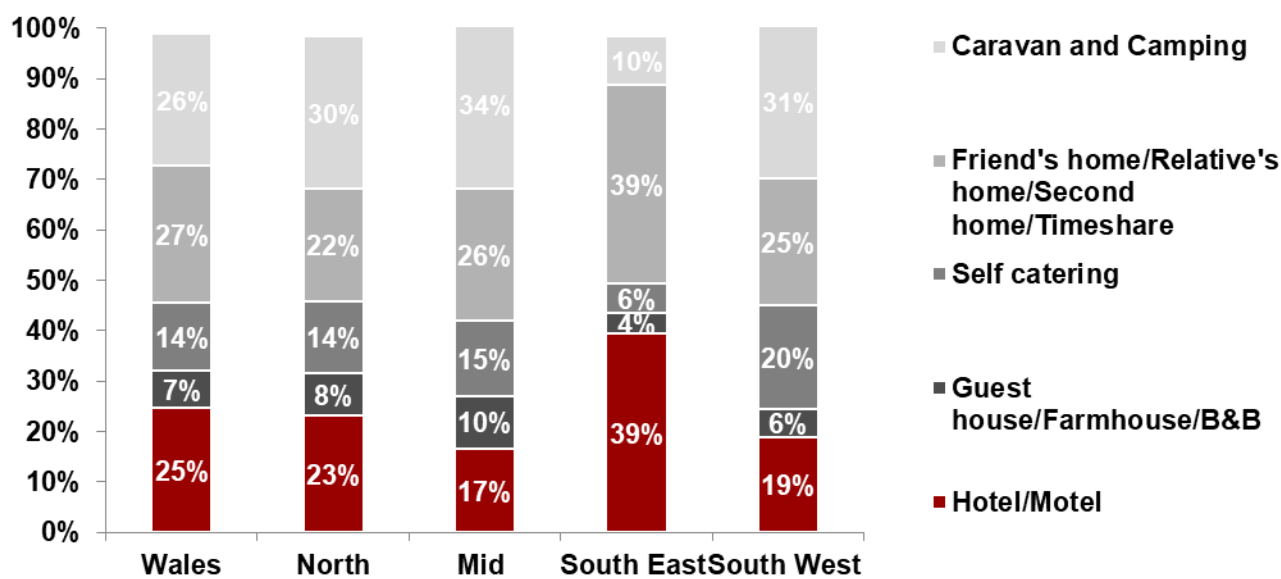
|                                                     | All Wales    | South East Wales |
|-----------------------------------------------------|--------------|------------------|
| <b>Total Trips</b>                                  | <b>9.914</b> | <b>2.307</b>     |
| Hotel/Motel                                         | 2.452        | 0.909            |
| Guest house/Farmhouse/B&B                           | 0.720        | 0.096            |
| Self catering                                       | 1.341        | 0.131            |
| Friend's home/Relative's home/Second home/Timeshare | 2.702        | 0.909            |
| Caravan and Camping                                 | 2.586        | 0.224            |

In 2017-2019, the most popular accommodation types used on an overnight domestic GB trip to South East Wales were hotels / motels and friends' / relatives' / second homes – each used in 39 per cent of visits. South East Wales saw the largest proportion of such visits using hotels/motels of all Welsh regions, and the largest proportion staying in friends' / relatives' / second homes.

The proportions of domestic overnight visits to South East Wales using caravan / camping, self-catering, and guesthouse/B&Bs were lower than the Wales average and for all three categories South East Wales saw the lowest proportions of all Welsh regions.

**Figure 2.10 Proportion (%) of Overnight Domestic GB Trips to All Wales and Wales Region by Type of Accommodation - Annual Average 2017-2019**

Source: Great Britain Tourism Survey



**Table 2.6 Value of Related Expenditure (£ millions) from Overnight Domestic GB Trips by Type of Accommodation Used during a trip to Wales and South East Wales – Annual Average 2017-2019**

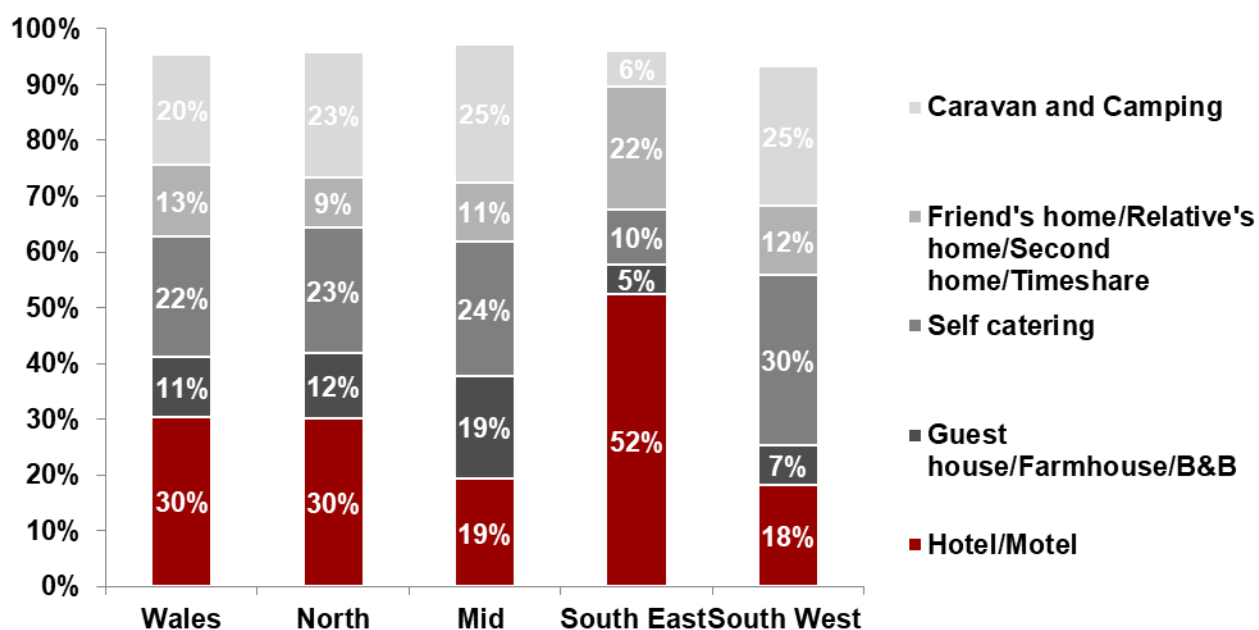
Source: Great Britain Tourism Survey

|                                                     | All Wales     | South East Wales |
|-----------------------------------------------------|---------------|------------------|
| <b>Total Expenditure</b>                            | <b>£1,828</b> | <b>£393</b>      |
| Hotel/Motel                                         | £557          | £206             |
| Guest house/Farmhouse/B&B                           | £195          | £21              |
| Self catering                                       | £395          | £39              |
| Friend's home/Relative's home/Second home/Timeshare | £233          | £87              |
| Caravan and Camping                                 | £362          | £25              |

During 2017-2019 domestic overnight visits involving a stay in hotels / motels accounted for over half (52 per cent) of domestic overnight spending in South East Wales, whilst only two fifths (39 per cent) of trips used this kind of accommodation. Conversely, stays with friends / relatives / in a second home accounted for the same proportion, two fifths of trips (39 per cent) as hotels / motels, but only one fifth (22 per cent) of overnight domestic spending.

The proportion of expenditure in South East Wales on trips using hotels / motels was above the Wales average, and the highest of all Wales regions. As expected from the lower than average proportions of trips using these types of accommodation, proportions of spending on trips using caravan / camping, self-catering and guesthouse/B&Bs in South East Wales were the lowest of all Welsh regions.

**Figure 2.11 Proportion (%) of Related Expenditure of Overnight Domestic GB Trips to All Wales and Wales Regions by Type of Accommodation – Annual Average 2017-2019**  
Source: Great Britain Tourism Survey



## Region of Origin

**Table 2.7 Volume of Overnight Domestic GB Trips (millions) by Region of Origin to All Wales and South East Wales – Annual Average 2017-2019**  
Source: Great Britain Tourism Survey

|                          | All Wales |      | South East Wales |      |
|--------------------------|-----------|------|------------------|------|
| Total Trips              | 9.914     | 100% | 2.307            | 100% |
| Scotland                 | 0.111     | 1%   | 0.029            | 1%   |
| Wales                    | 1.76      | 18%  | 0.441            | 19%  |
| England                  | 8.044     | 81%  | 1.837            | 80%  |
| North East England       | 0.088     | 1%   | 0.017            | 1%   |
| North West England       | 1.976     | 20%  | 0.154            | 7%   |
| Yorkshire and the Humber | 0.403     | 4%   | 0.080            | 3%   |
| East Midlands            | 0.669     | 7%   | 0.148            | 6%   |
| West Midlands            | 1.921     | 19%  | 0.258            | 11%  |
| East of England          | 0.373     | 4%   | 0.120            | 5%   |
| London                   | 0.577     | 6%   | 0.255            | 11%  |
| South East England       | 1.132     | 11%  | 0.446            | 19%  |
| South West England       | 0.905     | 9%   | 0.358            | 16%  |

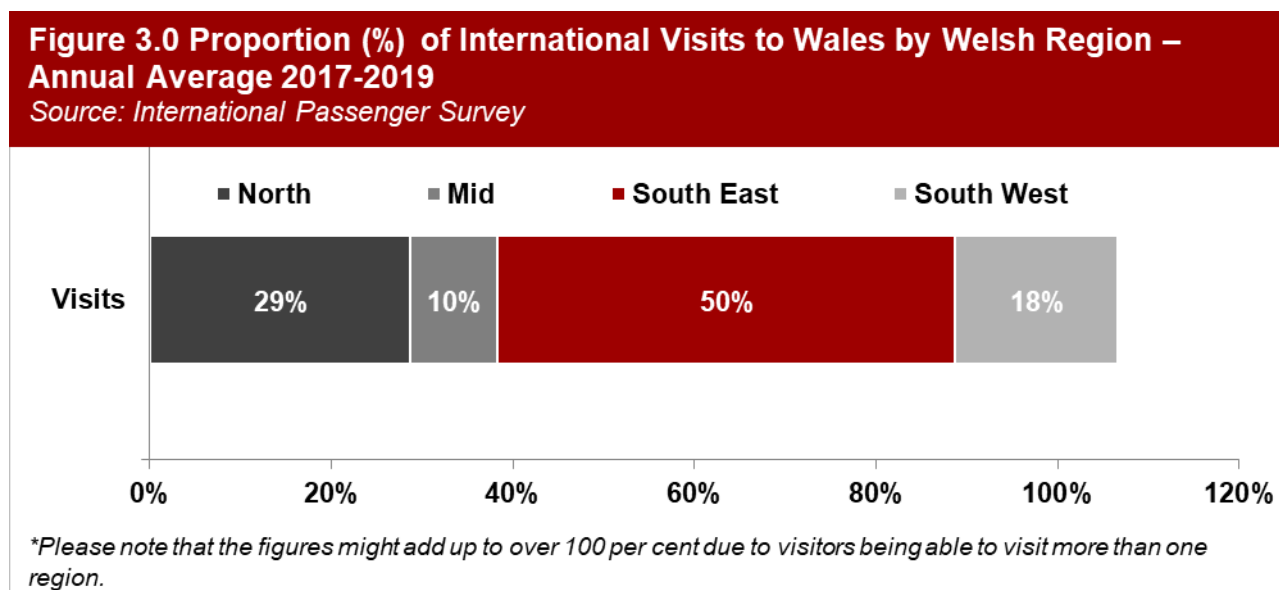
In 2017-2019, four fifths (80 per cent) of overnight domestic GB trips to South East Wales were from England, a similar proportion as the all Wales average and consistent over the past few years. Almost one fifth (19 per cent) were from Wales and the same proportion were residents of South East England. The second largest regional proportion of visitors came from South West England (16 per cent), followed by 11 per cent each coming from the West Midlands and London.

### 3. International Visitors to Wales

All the data used for this section has been sourced from the [International Passenger Survey](#). Figures shown are the averages taken over rolling three-year periods, unless stated otherwise.

In May 2020, the Office for National Statistics published revised estimates from the International Passenger Survey for inbound visits covering 2009 to 2019 based on an updated weighting method. Further details can be found on the [Office for National Statistics travel and tourism pages](#).

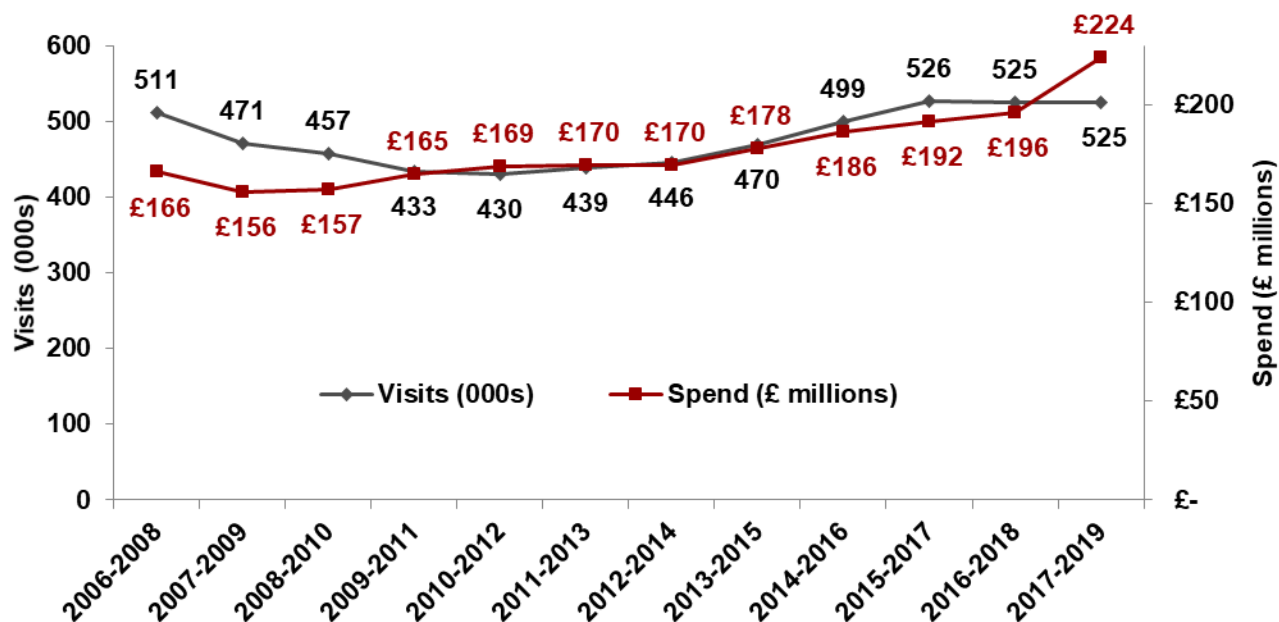
This section uses the updated data so figures for 2009 to 2018 quoted here will not match those in previous publications. Tables summarising the original and revised data for 2009 – 2019 are in [Table 7.2](#).



Over the period of 2017-2019, South East Wales received an annual average of 525,000 international visits per year. Over this same period these visits contributed to an average of £224 million per year to tourism spending in this region. South East Wales received half (50 per cent) of all international visits to Wales, the same proportion as during the previous period 2016-2018.

## Volume of Visits and Related Expenditure

**Figure 3.1 Volume of International Visits (000s) and Related Expenditure (£ millions) to South East Wales - Three Year Annual Averages**

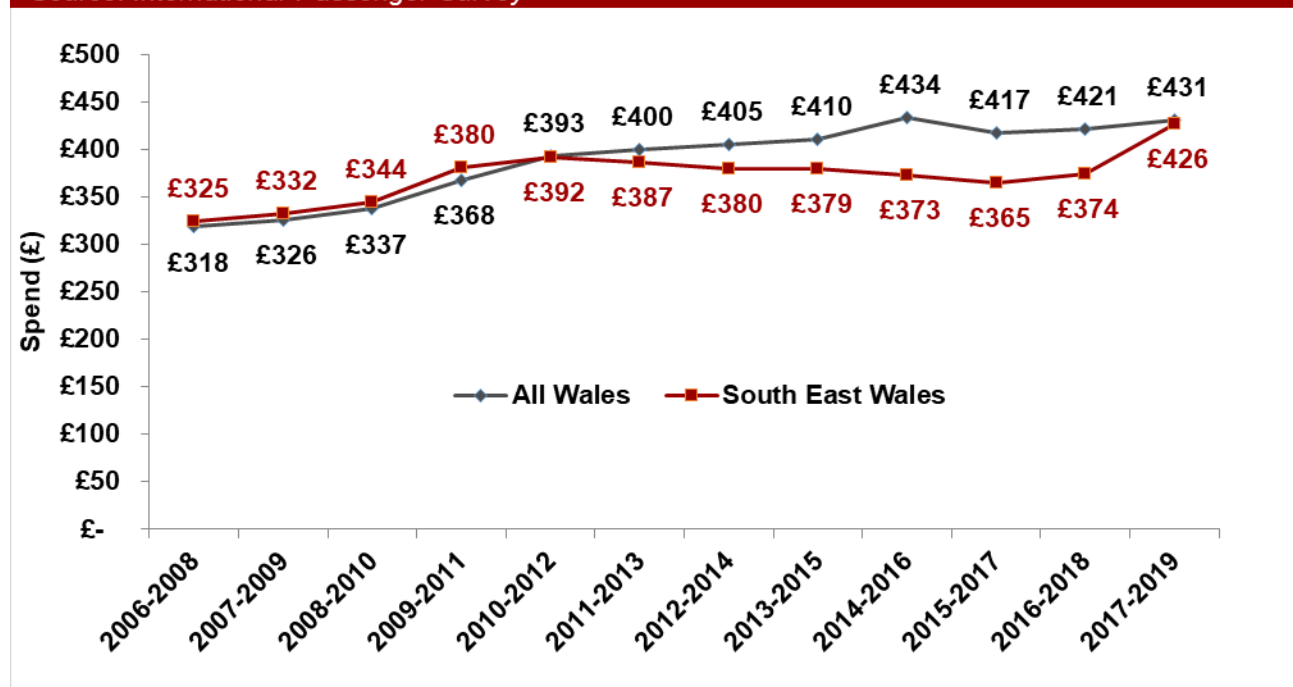


The volume of international visits to South East Wales has remained level over the last few periods since 2015-2017, at around 525,000 per year. Volume of visits started to fall around 2007-2009 but began to recover from 2011-2013. The related expenditure from international visits to South East Wales shows a general rising trend from 2007-2009, with a substantial uplift between 2016-2018 and 2017-2019 to reach £224 million from £196 million in the previous period.

## Average Spend per Visit

**Figure 3.2 Average Spend per International Visit (£) to All Wales and South East Wales – Three Year Annual Averages**

Source: International Passenger Survey

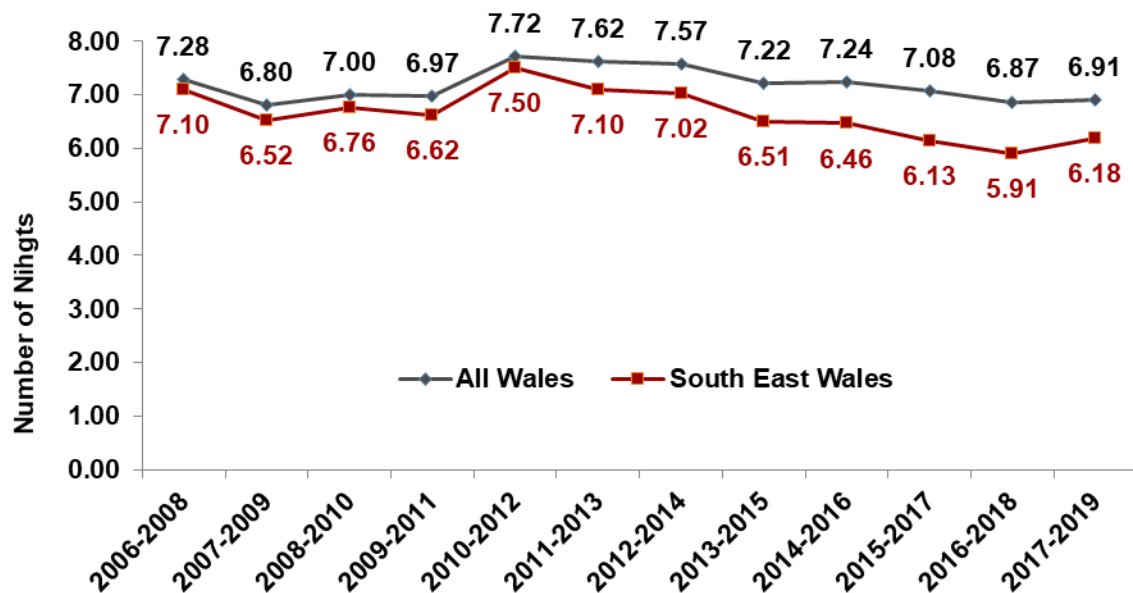


In 2017-2019 the average spend per international visit in South East Wales was £426, slightly below the Wales average of £431. Between 2006-2008 and 2010-2012 the average spend per trip to South East Wales was very similar to the all Wales average, but between 2011-2013 and 2016-2018 average spend per international visit in South Wales was well below the Wales average, and declined slightly. However in 2017-2019 average spend increased from £374 in 2016-2018 to £426, bringing it closer to the Wales average. The average number of nights per visit to South East Wales tends to be below the Wales average, (see [Figure 3.3](#)) which may explain the trend for a lower average spend per trip.

## Average Number of Nights per Visit

**Figure 3.3 Average Number of Nights per International Visit to Wales and South East Wales - Three Year Annual Averages**

Source: International Passenger Survey



The average trip duration of international visits to South East Wales in 2017-2019 was 6.18 nights, slightly lower than the all Wales average of 6.91 nights. The average trip length in South East Wales has consistently been below the all Wales average, and from 2010-2012 whilst the all Wales average also fell, the South East Wales average trip length fell more sharply, widening the gap. In 2017-2019 South East Wales saw a small uplift from 5.91 nights to 6.18 nights, bringing it closer to the Wales average, which remained steadier, increasing from 6.87 to 6.91 nights.

## Purpose of Trip

**Table 3.1 Volume of International Visits (thousands) by Purpose of Trip to All Wales and South East Wales – Annual Average 2017-2019**

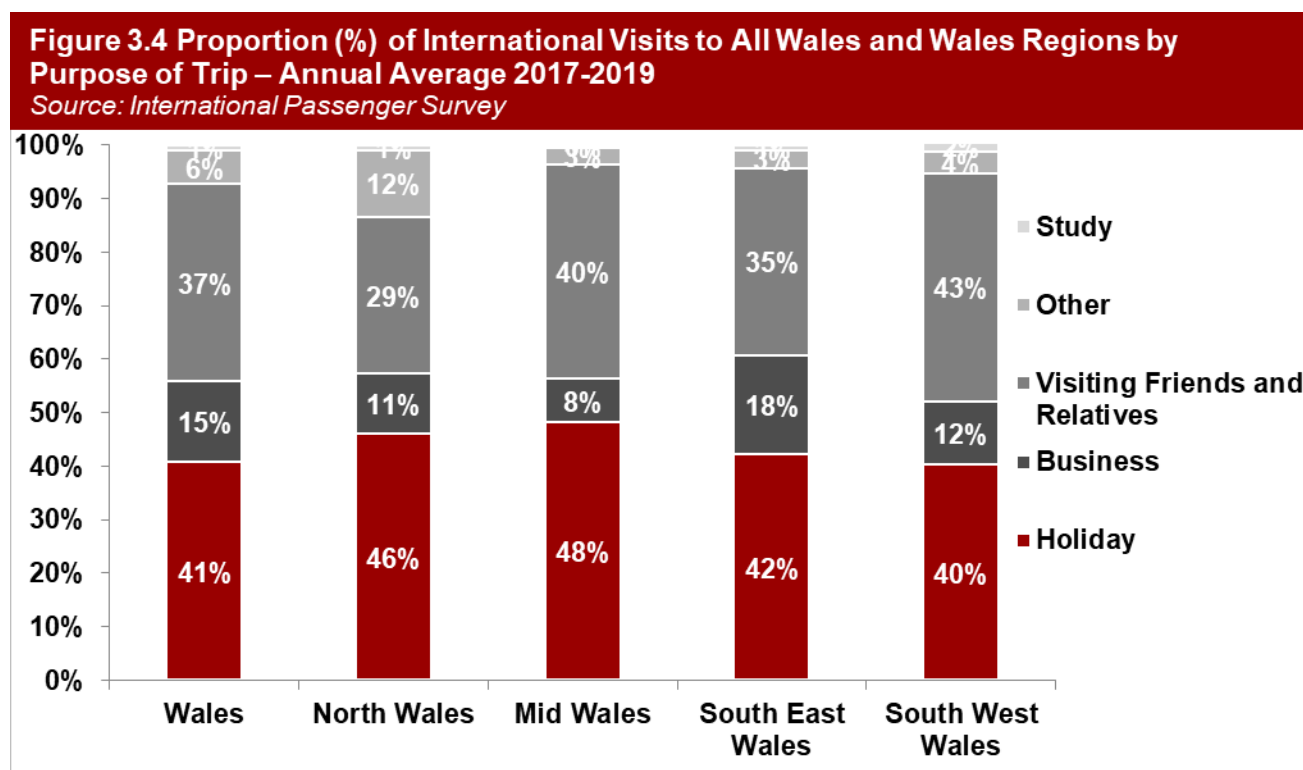
Source: International Passenger Survey

|                                | All Wales    | South East Wales |
|--------------------------------|--------------|------------------|
| <b>Total Trips</b>             | <b>1,041</b> | <b>525</b>       |
| Holiday                        | 424          | 222              |
| Business                       | 159          | 96               |
| Visiting Friends and Relatives | 382          | 185              |
| Other                          | 65           | 17               |
| Study                          | 11           | 5                |



In 2017-2019 the largest proportion of international visits to South East Wales were for holidays (42 per cent), similar to the average for Wales (41 per cent). The second most common reason for visiting the region was to visit friends or relatives, accounting for over a third (35 per cent) of visits, a slightly smaller proportion than Wales overall (37 per cent).

The region saw a larger proportion of international visits for business (18 per cent) than Wales on average (15 per cent).

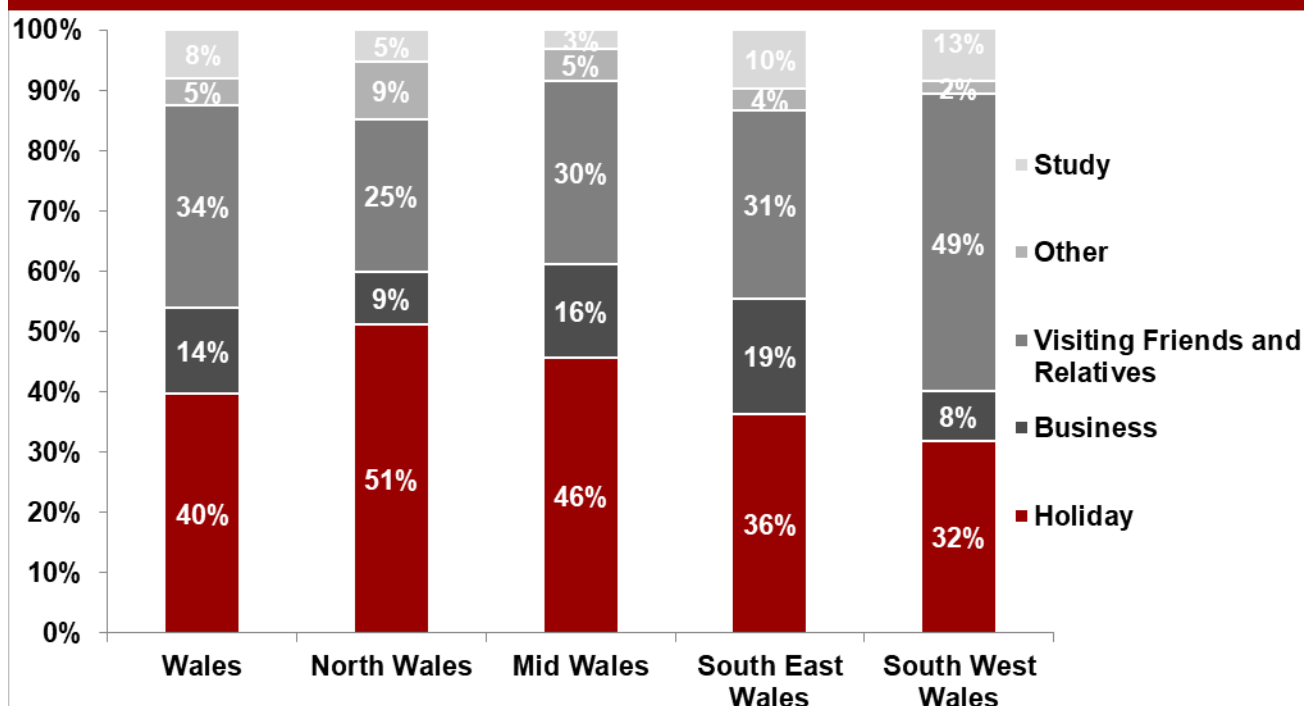


**Table 3.2 Related Expenditure (£ millions) of International Visits by Purpose of Trip to All Wales and South East Wales – Annual Average 2017-2019**  
Source: International Passenger Survey

|                                | All Wales    | South East Wales |
|--------------------------------|--------------|------------------|
| <b>Total Expenditure</b>       | <b>448.4</b> | <b>224.0</b>     |
| Holiday                        | 178.2        | 81.4             |
| Business                       | 63.6         | 42.8             |
| Visiting Friends and Relatives | 151.0        | 70.0             |
| Other                          | 20.2         | 8.0              |
| Study                          | 35.5         | 21.8             |

**Figure 3.5 Proportion (%) of Related Expenditure of International Visits to All Wales and Wales Regions by Purpose of Trip – Annual Average 2017-2019**

*Source: International Passenger Survey*



As seen across all four Welsh regions, international visitors coming to study account for a larger proportion of related expenditure in relation to the volume of visits. In 2017-2019, the 1 per cent of international visitors coming to South East Wales to study accounted for 10 per cent of all related expenditure from international visitors to the region.

Conversely, international holiday visitors accounted for over two fifths (42 per cent) of international trips to the region in 2017-2019, but just over one third (36 per cent) of related expenditure. Visits to friends or relatives also accounted for 42 per cent of international trips to the region, but only 31 per cent of associated spending.

International business trips accounted for similar proportions of international trip volume and spending, with 18 per cent of visits and 19 per cent of associated expenditure attributed to this type of visitor.

## Country of Origin

Please note that table 3.3 shows only the top ten countries of origin of international visitors by volume of visits to South East Wales and all Wales.

**Table 3.3 Top 10 Countries of Origin of International Visits by Volume of Visits (000s) with proportions (%) for All Wales and South East Wales – Annual Average 2017-2019**

*Source: International Passenger Survey*

| All Wales         |              |             | South East Wales  |            |             |
|-------------------|--------------|-------------|-------------------|------------|-------------|
| <b>All Visits</b> | <b>1,041</b> | <b>100%</b> | <b>All Visits</b> | <b>525</b> | <b>100%</b> |
| 1. Ireland        | 164          | 16%         | 1. France         | 51         | 10%         |
| 2. USA            | 108          | 10%         | 2. USA            | 49         | 9%          |
| 3. Germany        | 80           | 8%          | 3. Ireland        | 46         | 9%          |
| 4. France         | 73           | 7%          | 4. Germany        | 37         | 7%          |
| 5. Netherlands    | 58           | 6%          | 5. Italy          | 28         | 5%          |
| 6. Australia      | 53           | 5%          | 6. Spain          | 28         | 5%          |
| 7. Spain          | 47           | 4%          | 7. Netherlands    | 26         | 5%          |
| 8. Italy          | 41           | 4%          | 8. Australia      | 22         | 4%          |
| 9. Poland         | 36           | 3%          | 9. China          | 19         | 4%          |
| 10. Canada        | 31           | 3%          | 10. Canada        | 17         | 3%          |

The most common country of origin for international visitors to South East Wales during 2017-2019 was France (10 per cent), followed by USA (9 per cent) and Ireland (9 per cent).

The top 10 countries of origin for international visitors to South East Wales in 2017-2019 mirrored those for Wales on average, with the exception of Poland which does not feature in the top 10 for South East Wales, being replaced by China.

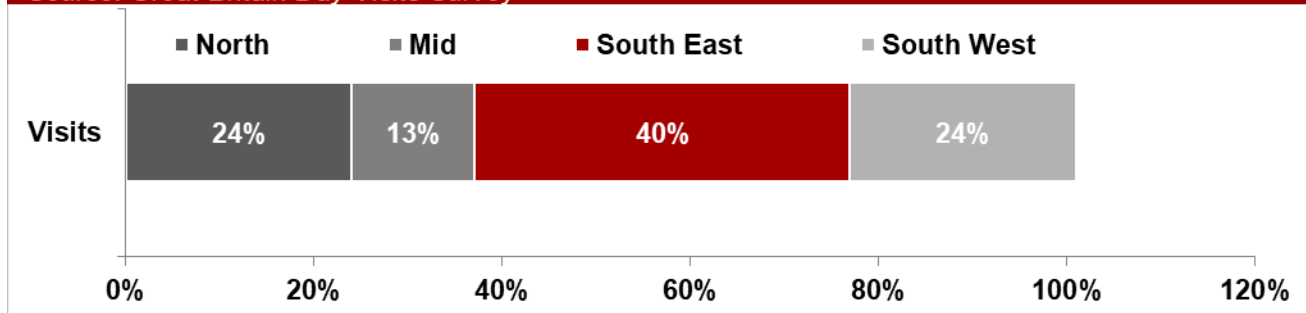
## 4. Tourism Day Visits

All the data in this section has been sourced from the [Great Britain Day Visits Survey](#). There are three types of day visits: '3 Hour+ Leisure Day Visits', 'Tourism Day Visits' and 'Activities Core to Tourism Visits'. **This section will only cover figures for Tourism Day Visits.** Figures for other leisure day visits can be found in the Great Britain Day Visits [Annual reports](#). Figures shown, unless otherwise stated, are the averages taken over three years: 2017-2019.

*Please note that since 2016 there have been several revisions to the way this survey has been carried out which has affected the comparability of 2011-2015 figures with those from 2016 onwards. To remedy this, figures pre-2016 have been reweighted by +15 per cent in order to be able to compare them. Thus some of the Tourism Day visits figures below might not match those previously published.*

**Figure 4.0 Proportion (%) of Tourism Day Visits to each Welsh Region – Annual Average 2017-2019**

Source: Great Britain Day Visits Survey

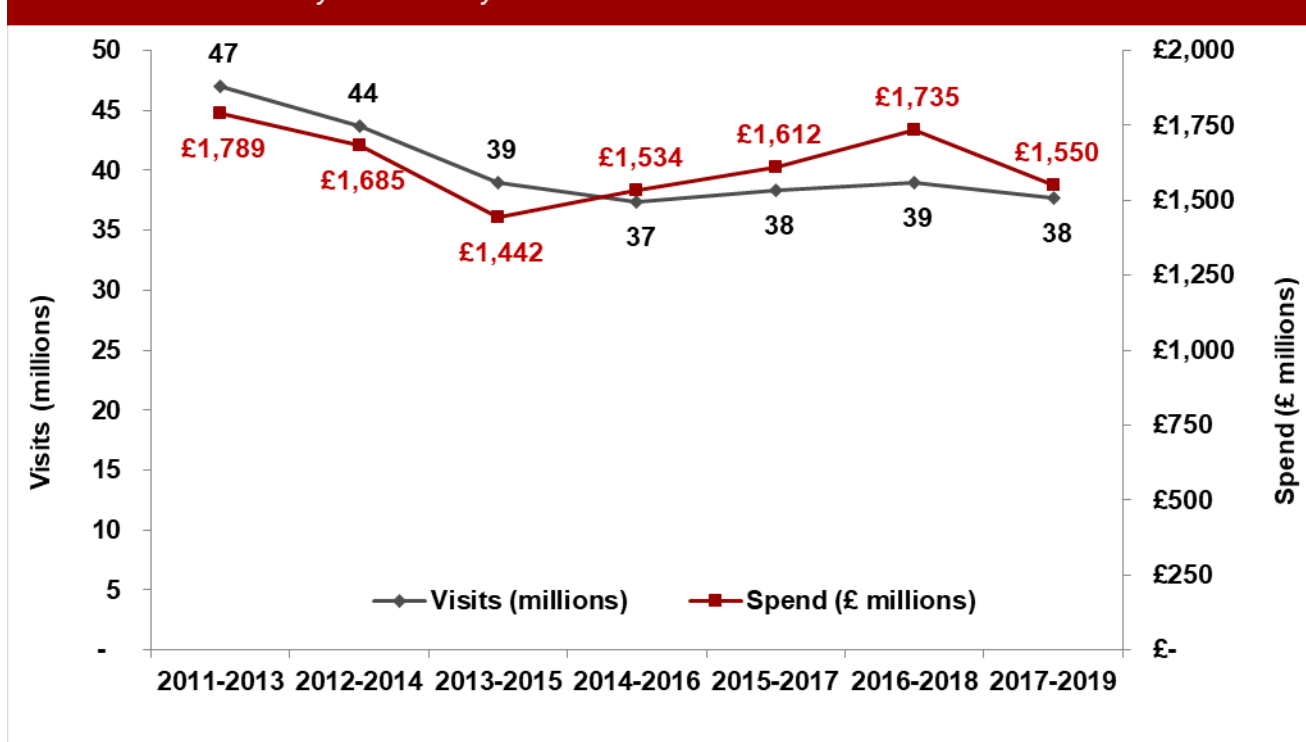


During 2017-2019, South East Wales received an annual average of 38 million Tourism Day visits with a related expenditure of £1.5 billion per year. Furthermore, South East Wales received 40 per cent of all Tourism Day visits to Wales. A large proportion of Tourism Day visits in Wales are made by people living in Wales, so the larger population base in South East Wales is likely to account for the high proportion of Tourism Day visits taking place in this region.

## Tourism Day Visits and Related Expenditure

**Figure 4.1 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) to South East Wales - Three Year Annual Averages**

Source: Great Britain Day Visits Survey

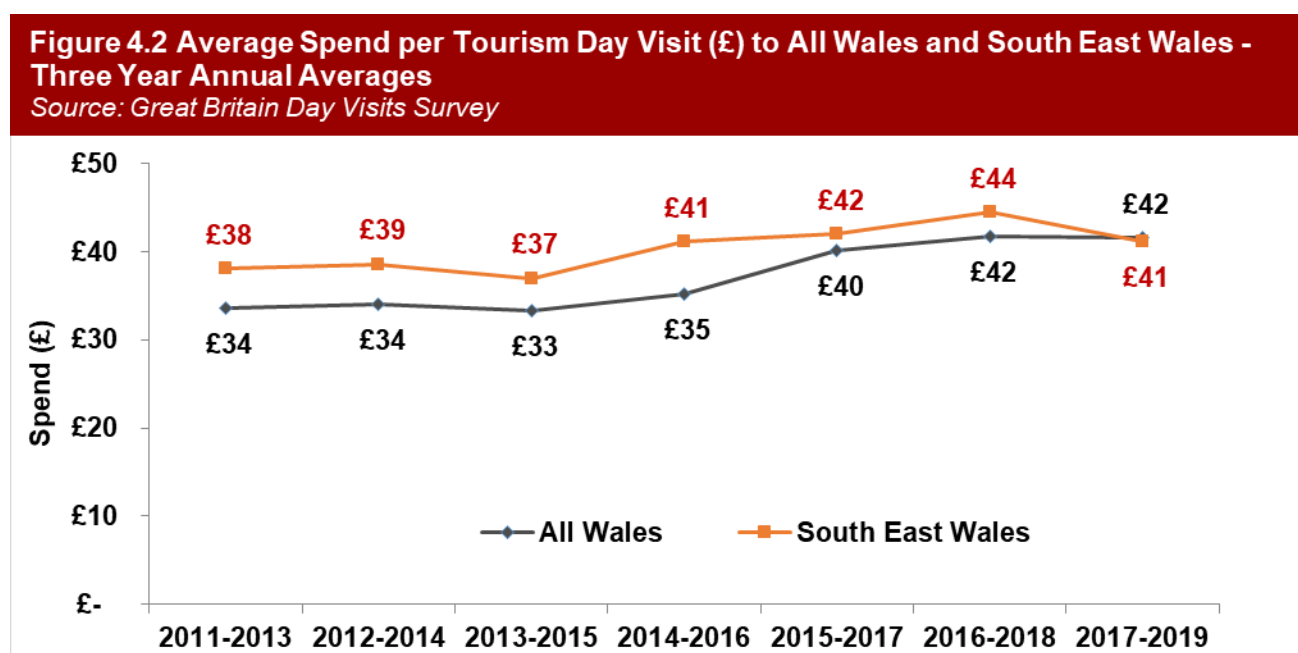


Between 2011-2013 and 2014-2016, the volume of Tourism Day visits to South East Wales steadily decreased, reaching 37 million in 2014-2016. Since 2014-2016, the volume has remained relatively

stable, at 38 – 39 million over the past three periods. Between 2016-2018 and 2017-2019 the volume of Tourism Day visits in South East Wales decreased by 3 per cent, whilst the volume of visits to Wales overall decreased by 5 per cent.

Associated spending decreased between 2011-2013 and 2013-2015, followed by an increase to reach £1,735 million in 2016-2018, but in 2017-2019 fell once again to £1,550 million. This represented a fall of 11 per cent in spending on Tourism Day visits in South East Wales, a larger fall than the 5 per cent decrease in spending seen for Wales overall.

### Average Spend per Visit



The average spend per Tourism Day visit in South East Wales had continuously remained above the all Wales average, reaching £44 in 2016-2018, but in 2017-2019 dipped below the all Wales average, falling 8 per cent to £41, whereas the Wales average remained level at £42.

## Activities Undertaken

**Table 4.1 Volume of Tourism Day Visits (millions) and Proportion (%) of activities undertaken during a Tourism Day Visit to All Wales and South East Wales – Annual Average 2017-2019**

*Source: Great Britain Day Visits Survey*

| All Wales                     |             |             | South East Wales              |             |             |
|-------------------------------|-------------|-------------|-------------------------------|-------------|-------------|
| <b>All Visits</b>             | <b>94.4</b> | <b>100%</b> | <b>All Visits</b>             | <b>37.7</b> | <b>100%</b> |
| Visiting friends or family    | 22.0        | 23%         | Visiting friends or family    | 7.9         | 21%         |
| Going out for a meal          | 9.7         | 10%         | Going out for a meal          | 3.7         | 10%         |
| Outdoor activities            | 8.7         | 9%          | Outdoor activities            | 2.6         | 7%          |
| General day out               | 7.8         | 8%          | General day out               | 2.5         | 7%          |
| Going on a night out          | 6.8         | 7%          | Going on a night out          | 3.1         | 8%          |
| Special shopping              | 6.3         | 7%          | Special shopping              | 3.0         | 8%          |
| Going out for entertainment   | 4.8         | 5%          | Going out for entertainment   | 2.6         | 7%          |
| Going to visitor attractions  | 4.5         | 5%          | Going to visitor attractions  | 1.6         | 4%          |
| Watching live sporting events | 3.4         | 4%          | Watching live sporting events | 2.0         | 5%          |
| Special personal events       | 2.9         | 3%          | Special personal events       | 1.0         | 3%          |
| Special public events         | 2.5         | 3%          | Special public events         | 0.8         | 2%          |
| Taking part in sports         | 1.4         | 1%          | Taking part in sports         | 0.6         | 1%          |
| Day out to health/beauty spa  | 0.7         | 1%          | Day out to health/beauty spa  | 0.3         | 1%          |
| Other leisure/ hobbies        | 2.1         | 2%          | Other leisure/ hobbies        | 0.9         | 2%          |
| Other day out for leisure     | 3.2         | 3%          | Other day out for leisure     | 0.6         | 2%          |

Just over a fifth (21 per cent) of Tourism Day visits to South East Wales, nearly 8 million, were to visit friends or family in 2017-2019, making it the most popular activity undertaken on a Tourism Day visit to this region, though a slightly smaller proportion than the all Wales average of 23 per cent.

A slightly lower proportion of Tourism Day visits to South East Wales were for outdoor activities (7 per cent) compared with the Wales average of 9 per cent, and a slightly higher proportion were to go out for entertainment (7 per cent) than the Wales average of 5 per cent.

## Type of Place Visited

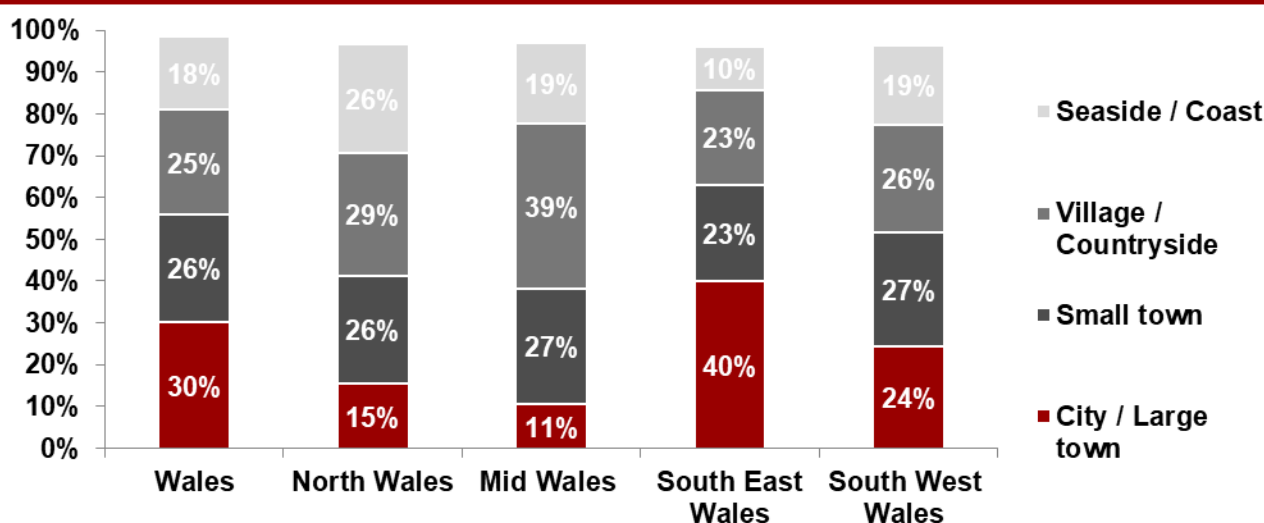
**Table 4.2 Volume of Tourism Day Visits (millions) by Type of Place Visited to All Wales and South East Wales – Annual Average 2017-2019**

*Source: Great Britain Day Visits Survey*

|                       | All Wales | South East Wales |
|-----------------------|-----------|------------------|
| <b>Total Visits</b>   | <b>94</b> | <b>38</b>        |
| City / Large town     | 29        | 15               |
| Small town            | 24        | 9                |
| Village / Countryside | 24        | 9                |
| Seaside / Coast       | 17        | 4                |

**Figure 4.3 Proportion (%) of Tourism Day Visits to All Wales and Wales Regions by Type of Place Visited - Annual Average 2017-2019**

Source: Great Britain Day Visits Survey



\*Please note that the figures might not add to 100 per cent due to survey participants not answering this question or selecting 'Don't Know'/'Other'.

In South East Wales, unsurprisingly, the type of place most visited on a Tourism Day visit was a city/large town, with two fifths (40 per cent, 15 million) of Tourism Day visitors choosing this place, which is considerably higher than the all Wales average of 30 per cent.

Compared to Wales overall, South East Wales had a smaller proportion (10 per cent) of Tourism Day visits to the seaside/coast compared to 18 per cent. The distribution of type of place visited in South East Wales during 2017-2019 is very similar to previous periods.

## Mode of Transport Used

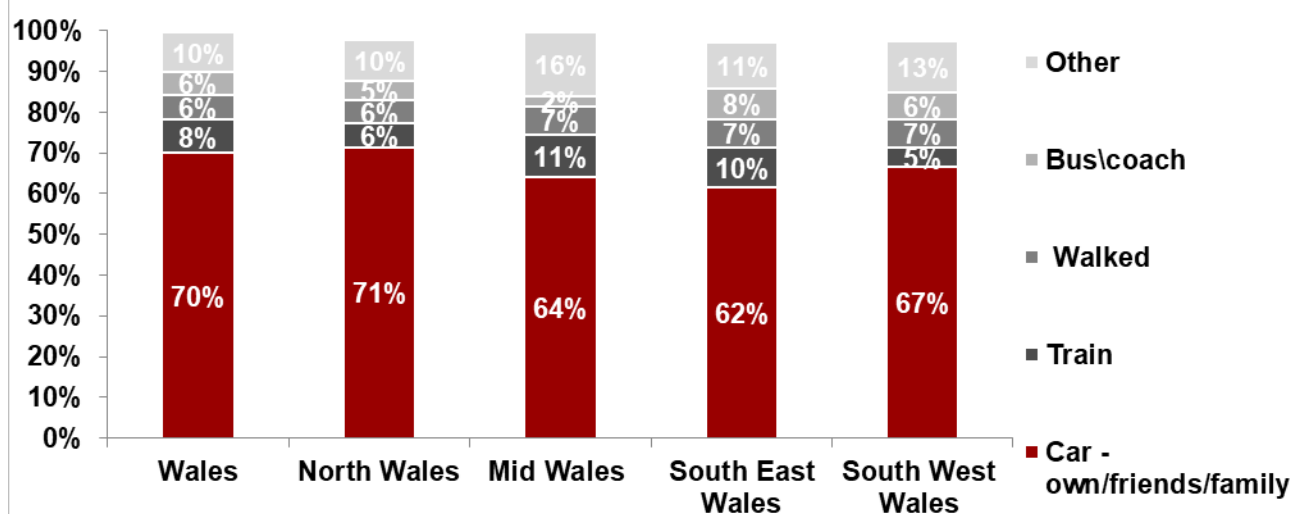
**Table 4.3 Volume of Tourism Day Visits (millions) by Mode of Transport to All Wales and South East Wales – Annual Average 2017-2019**

Source: Great Britain Day Visits Survey

|                          | All Wales | South East Wales |
|--------------------------|-----------|------------------|
| <b>Total Visits</b>      | <b>94</b> | <b>38</b>        |
| Car - own/friends/family | 66        | 23               |
| Train                    | 8         | 4                |
| Walked                   | 6         | 3                |
| Bus\coach                | 5         | 3                |
| Other                    | 9         | 4                |

**Figure 4.4 Proportion (%) of Tourism Day Visits to All Wales and Wales Regions by Mode of Transport Used - Annual Average 2017-2019**

Source: Great Britain Day Visits Survey



*\*\*Other' category includes: hired car, organised coach tour, taxi, bicycle, tube, tram, Motorised caravan/campervan, plane, boat, lorry/van*

Like for other regions of Wales, the car was the preferred mode of transport for the majority (62 per cent) of Tourism Day visits during 2017-2019, in South East Wales, though less so than for Wales overall where cars were used for 70 per cent of Tourism Day visits. Trains, bus/coach, walking and other transport modes were each used on a slightly higher proportion of Tourism Day visits in South East Wales than for Wales on average.

## Distance Travelled

**Table 4.4 Volume of Tourism Day Visits (millions) by Distance Travelled in All Wales and South East Wales – Three Year Average 2017-2019**

Source: Great Britain Day Visits Survey

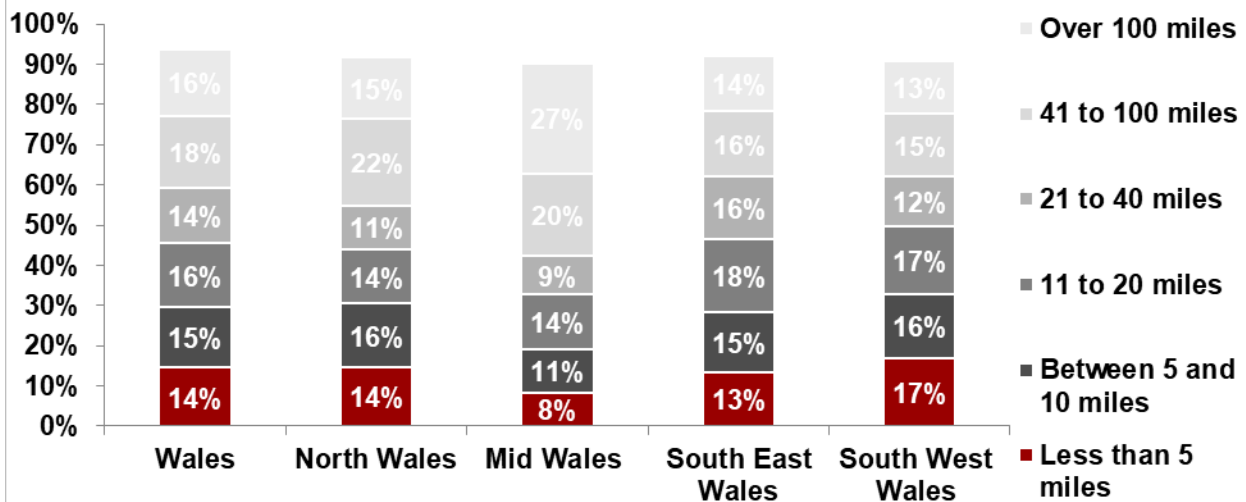
|                        | All Wales | South East Wales |
|------------------------|-----------|------------------|
| <b>Total Visits</b>    | <b>94</b> | <b>38</b>        |
| Less than 5 miles      | 14        | 5                |
| Between 5 and 10 miles | 14        | 6                |
| 11 to 20 miles         | 15        | 7                |
| 21 to 40 miles         | 13        | 6                |
| 41 to 100 miles        | 17        | 6                |
| Over 100 miles         | 15        | 3                |

*\*Please note that the travel distance categories vary in size.*

The distribution of distances travelled for Tourism Day visits during 2017-2019 in South East Wales follows the approximate distribution for Wales on average. In South East Wales a slightly larger proportion (18 per cent) travelled 11-20 miles than in Wales on average (16 per cent).



**Figure 4.5 Proportion (%) of Tourism Day Visits to All Wales and Wales Regions by Distance Travelled - Annual Average 2017-2019**  
Source: Great Britain Day Visits Survey



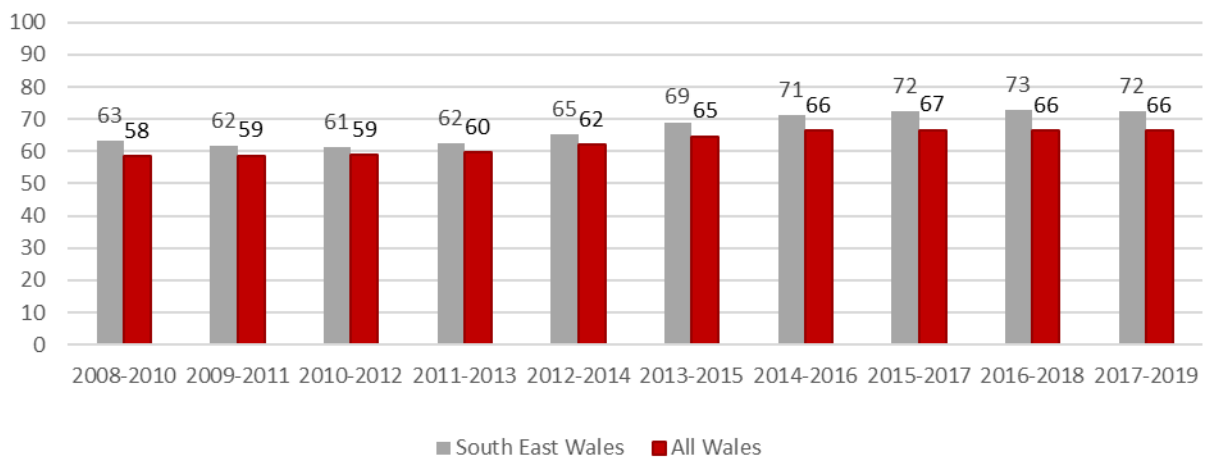
\*Please note that the figures might not add to 100 per cent due to survey participants not answering this question or selecting 'Don't Know'/'Other'.

## 5. Accommodation Occupancy Rates

All the data used for this section has been sourced from the [Wales Tourism Accommodation Occupancy Survey](#). Figures shown are the averages taken over three years, 2016-2018, unless stated otherwise. See [Table 6.5](#) for full data set.

### Hotels

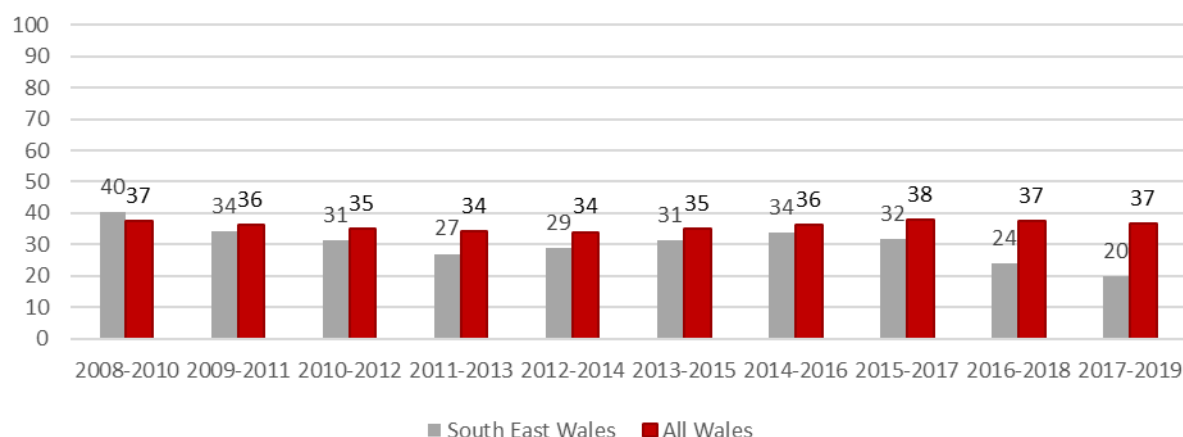
**Figure 5.0 Three Year Annual Average Hotel Room Occupancy Rates (%) for All Wales and South East Wales**  
Source: Visit Wales Occupancy Survey



The average hotel room occupancy rate in South East Wales has remained relatively level over recent years, and in 2017-2019 at 72 per cent was the highest of all Wales regions. The average hotel room occupancy rate in Wales was 66 per cent.

## Guesthouses and B&Bs

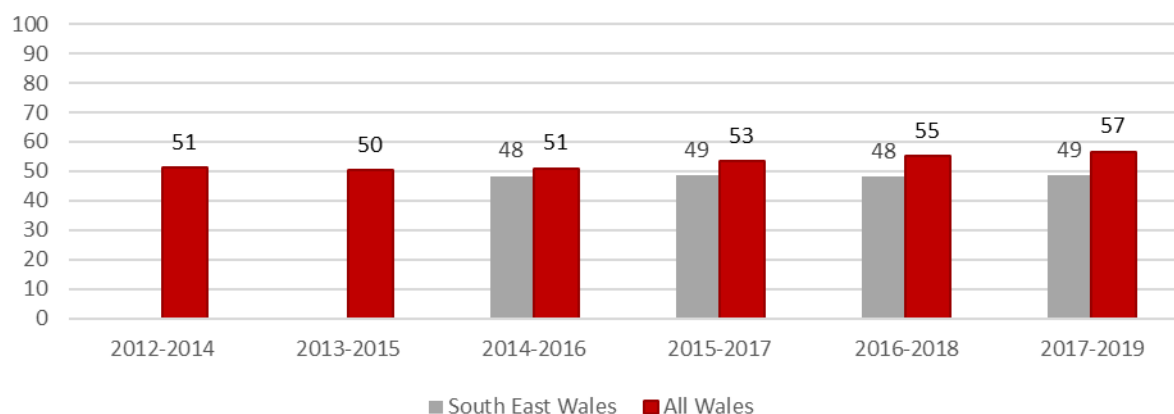
**Figure 5.1 Three Year Annual Average Guesthouse/Bed and Breakfast Room Occupancy Rates (%) for All Wales and South East Wales**  
Source: Visit Wales Occupancy Survey



Average Guesthouse/B&B room occupancy rates in South East Wales have fallen in recent years, from 24 per cent in 2016-2018 to 20 per cent in 2017-2019. Over the same period, average rates in Wales have remained higher and more stable, moving from 38 per cent in 2015-2017 to 37 per cent in 2016-2018 and 2017-2019.

## Self-Catering

**Figure 5.2 Three Year Annual Average Self-Catering Unit Occupancy Rates (%) for All Wales and South East Wales**  
Source: Visit Wales Occupancy Survey



\*South East Wales figures not available until 2014

Self-catering unit occupancy rates have remained relatively level in recent years, though have been consistently below the rates seen across Wales on average. Since 2013-2015 occupancy rates for self-catering units have been rising in Wales on average, moving from 55 per cent in 2016-2018 to 57 per cent in 2017-2019.

## Static Caravan and Holiday Homes

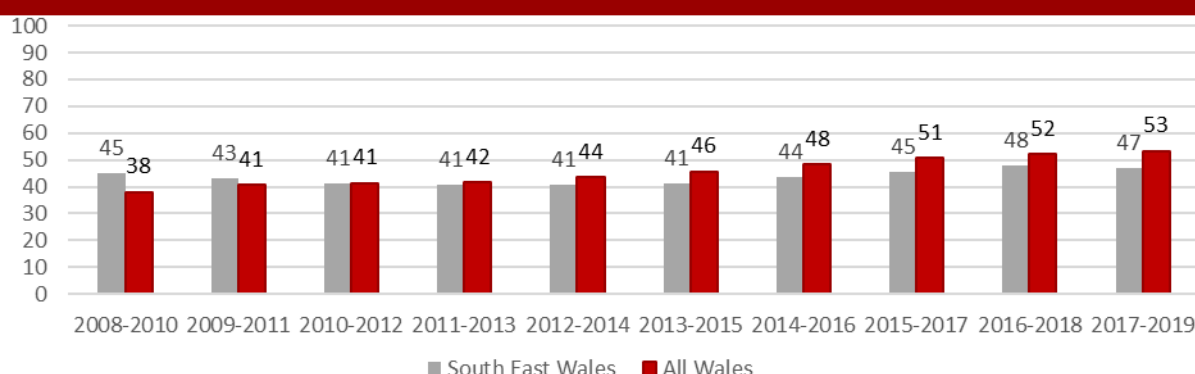
Static caravan and holiday home occupancy rates for South East Wales are not given due to the small sample size.

## Touring Caravan and Camping

Touring caravan and camping occupancy rates for South East Wales are not given due to the small sample size.

## Hostels

**Figure 5.3 Three Year Annual Average Hostel Bedspace Occupancy Rates (%) for All Wales and South East Wales**  
*Source: Visit Wales Occupancy Survey*



South East Wales had the lowest hostel occupancy rates in Wales for 2017-2019 at 47 per cent, compared to the Wales average of 53 per cent. The average hostel occupancy rates in Wales have shown slow increases since 2008-2010, and for the most part, South East Wales has followed that trend though consistently a few percentage points lower than the all Wales rate.

## 6. Further Resources

Welsh Government publishes regular tourism research and statistics, including:

Official Tourism Statistics: [Wales Tourism Performance](#)

A comprehensive report that includes the most recent quarterly data from the main tourism surveys

[Great Britain Tourism Survey](#)

A national consumer survey measuring the volume and value of overnight trips taken by residents of Great Britain

[Great Britain Day Visit Survey](#)

A national consumer survey measuring the volume and value of day trips taken by residents of Great Britain

[Wales Visitor Survey](#)

A regular study undertaken every few years to gain a detailed profile of leisure visitors to Wales, including feedback on visitor satisfaction

[Tourism Business Barometer](#)

A regular survey conducted after key points during the annual tourism season providing a 'snapshot' of industry performance.

[Visits to Tourist Attractions](#)

An annual survey and report monitoring trends in the tourist attraction sector

[Wales Tourism Accommodation Occupancy Surveys](#)

An occupancy survey providing trend information on the demand of tourist accommodation in Wales.

[Accommodation bedstocks](#)

Data on the number of tourism accommodation establishments and bedspaces in Wales by region and accommodation type.

## 7. Appendix

### Overnight Domestic GB Visitors

**Table 7.1 Volume of Overnight Domestic GB Trips (millions), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Averages**

*Source: Great Britain Tourism Survey*

| Trips (millions)   |           |           |           |           |           |           |           |           |           |           |           |
|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
|                    | 2007-2009 | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| GB                 | 118.944   | 117.563   | 121.628   | 122.788   | 125.186   | 121.055   | 120.524   | 119.374   | 121.519   | 119.562   | 120.671   |
| Wales              | 8.718     | 8.669     | 9.084     | 9.322     | 9.743     | 9.845     | 10.127    | 9.919     | 9.593     | 9.451     | 9.914     |
| North Wales        | 3.030     | 3.184     | 3.264     | 3.417     | 3.488     | 3.655     | 3.713     | 3.626     | 3.428     | 3.378     | 3.653     |
| Mid Wales          | 1.591     | 1.577     | 1.585     | 1.540     | 1.618     | 1.717     | 1.763     | 1.750     | 1.740     | 1.887     | 1.916     |
| South East Wales   | 2.124     | 1.943     | 2.027     | 2.110     | 2.310     | 2.231     | 2.473     | 2.471     | 2.463     | 2.252     | 2.307     |
| South West Wales   | 1.882     | 1.863     | 2.063     | 2.074     | 2.160     | 2.089     | 2.081     | 2.014     | 1.890     | 1.862     | 1.939     |
| Nights (millions)  |           |           |           |           |           |           |           |           |           |           |           |
|                    | 2007-2009 | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| GB                 | 379.046   | 372.160   | 378.725   | 378.989   | 383.059   | 370.464   | 366.751   | 362.068   | 368.704   | 366.920   | 371.003   |
| Wales              | 32.084    | 32.380    | 33.429    | 34.144    | 34.450    | 34.484    | 34.974    | 34.739    | 33.385    | 33.198    | 33.898    |
| North Wales        | 11.822    | 12.346    | 12.988    | 13.415    | 13.354    | 13.575    | 13.199    | 13.222    | 12.221    | 12.450    | 12.859    |
| Mid Wales          | 6.026     | 6.204     | 6.131     | 6.087     | 6.244     | 6.535     | 6.794     | 6.819     | 6.730     | 6.977     | 6.650     |
| South East Wales   | 5.818     | 5.476     | 5.241     | 5.370     | 5.494     | 5.291     | 6.097     | 6.213     | 6.350     | 5.866     | 6.162     |
| South West Wales   | 7.558     | 7.382     | 7.983     | 8.066     | 8.243     | 8.166     | 8.153     | 7.907     | 7.468     | 7.321     | 7.573     |
| Spend (£ millions) |           |           |           |           |           |           |           |           |           |           |           |
|                    | 2007-2009 | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| GB                 | £ 20,458  | £ 20,312  | £ 21,145  | £ 22,146  | £ 23,312  | £ 23,320  | £ 23,603  | £ 23,532  | £ 23,862  | £ 23,574  | £ 24,098  |
| Wales              | £ 1,403   | £ 1,413   | £ 1,523   | £ 1,587   | £ 1,673   | £ 1,673   | £ 1,802   | £ 1,800   | £ 1,764   | £ 1,723   | £ 1,828   |
| North Wales        | £ 495     | £ 508     | £ 544     | £ 545     | £ 582     | £ 591     | £ 639     | £ 639     | £ 613     | £ 626     | £ 682     |
| Mid Wales          | £ 228     | £ 252     | £ 257     | £ 255     | £ 262     | £ 281     | £ 309     | £ 311     | £ 304     | £ 314     | £ 335     |
| South East Wales   | £ 328     | £ 302     | £ 309     | £ 349     | £ 374     | £ 361     | £ 418     | £ 421     | £ 422     | £ 373     | £ 393     |
| South West Wales   | £ 308     | £ 314     | £ 364     | £ 390     | £ 397     | £ 390     | £ 386     | £ 387     | £ 384     | £ 374     | £ 383     |

## International Visitors

**Table 7.2 Volume of International Visits (000s), Nights (000s) and Related Expenditure (£ millions) – Annual original v revised**  
*Source: International Passenger Survey*

| Visits (000s)    |      |      |      |      |      |      |      |       |       |      |       |
|------------------|------|------|------|------|------|------|------|-------|-------|------|-------|
|                  | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016  | 2017  | 2018 | 2019  |
| Wales - original | 991  | 890  | 879  | 854  | 869  | 933  | 970  | 1,074 | 1,079 | 941  |       |
| Wales - revised  | 986  | 878  | 877  | 848  | 877  | 935  | 958  | 1,080 | 1,112 | 988  | 1,023 |

| Nights (000s)    |        |        |        |        |        |        |        |        |        |        |        |
|------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
|                  | 2009   | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019   |
| Wales - original | 6,288  | 6,245  | 6,302  | 7,112  | 5,866  | 6,662  | 7,355  | 7,166  | 6,894  | 6,522  |        |
| Wales - revised  | 15,013 | 13,233 | 13,838 | 15,229 | 12,540 | 15,794 | 15,859 | 15,791 | 14,450 | 13,906 | 13,731 |

| Spend (£ millions) |      |      |      |      |      |      |      |      |      |      |      |
|--------------------|------|------|------|------|------|------|------|------|------|------|------|
|                    | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
| Wales - original   | £332 | £333 | £328 | £346 | £352 | £368 | £410 | £444 | £369 | £405 |      |
| Wales - revised    | £337 | £336 | £335 | £352 | £353 | £373 | £409 | £507 | £397 | £433 | £515 |

**Table 7.3 Volume of International Visits (000s), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Averages**

*Source: International Passenger Survey*

| Visits (000s)    |           |           |           |           |           |           |           |           |           |           |           |           |
|------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
|                  | 2006-2008 | 2007-2009 | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| UK               | 32,460    | 31,913    | 31,120    | 31,119    | 31,502    | 32,558    | 33,708    | 35,232    | 37,086    | 39,000    | 40,164    | 40,740    |
| Wales            | 1,063     | 1,013     | 977       | 914       | 868       | 867       | 887       | 923       | 991       | 1,050     | 1,060     | 1,041     |
| North Wales      | 298       | 304       | 289       | 270       | 247       | 233       | 229       | 250       | 270       | 298       | 303       | 299       |
| Mid Wales        | 89        | 82        | 87        | 78        | 80        | 77        | 80        | 85        | 98        | 107       | 107       | 99        |
| South East Wales | 511       | 471       | 457       | 433       | 430       | 439       | 446       | 470       | 499       | 526       | 525       | 525       |
| South West Wales | 214       | 202       | 201       | 190       | 173       | 173       | 190       | 190       | 203       | 203       | 198       | 187       |

| Nights (millions) |           |           |           |           |           |           |           |           |           |           |           |           |
|-------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
|                   | 2006-2008 | 2007-2009 | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| UK                | 256.904   | 246.105   | 241.013   | 241.637   | 242.072   | 248.761   | 258.797   | 272.662   | 287.121   | 298.760   | 301.229   | 297.876   |
| Wales             | 7.737     | 6.889     | 6.833     | 6.373     | 6.696     | 6.608     | 6.713     | 6.671     | 7.173     | 7.437     | 7.281     | 7.198     |
| North Wales       | 1.792     | 1.576     | 1.495     | 1.545     | 1.712     | 1.700     | 1.647     | 1.555     | 1.686     | 1.633     | 1.668     | 1.567     |
| Mid Wales         | 0.637     | 0.630     | 0.640     | 0.509     | 0.513     | 0.498     | 0.565     | 0.619     | 0.740     | 1.045     | 1.001     | 0.856     |
| South East Wales  | 3.631     | 3.069     | 3.085     | 2.869     | 3.228     | 3.119     | 3.134     | 3.058     | 3.228     | 3.229     | 3.102     | 3.249     |
| South West Wales  | 1.570     | 1.552     | 1.544     | 1.379     | 1.186     | 1.242     | 1.318     | 1.369     | 1.447     | 1.421     | 1.392     | 1.352     |

| Spend (£ millions) |           |           |           |           |           |           |           |           |           |           |           |           |
|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
|                    | 2006-2008 | 2007-2009 | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| UK                 | £15,981   | £16,517   | £17,129   | £18,009   | £18,722   | £20,185   | £21,665   | £23,019   | £24,091   | £25,749   | £26,631   | £27,637   |
| Wales              | £338      | £330      | £329      | £336      | £341      | £347      | £359      | £378      | £430      | £438      | £446      | £448      |
| North Wales        | £77       | £82       | £79       | £80       | £81       | £77       | £76       | £80       | £88       | £92       | £90       | £89       |
| Mid Wales          | £27       | £24       | £28       | £27       | £33       | £34       | £36       | £39       | £58       | £62       | £54       | £31       |
| South East Wales   | £166      | £156      | £157      | £165      | £169      | £170      | £170      | £178      | £186      | £192      | £196      | £224      |
| South West Wales   | £62       | £62       | £62       | £61       | £56       | £62       | £75       | £76       | £91       | £84       | £95       | £92       |

## Tourism Day Visitors

Please note that since 2016 there have been several revisions to the way this survey has been carried out which has affected the comparability of 2011-2015 figures with those from 2016 onwards. To remedy this, figures pre-2016 have been reweighted by +15 per cent in order to be able to compare them. Thus some of the Tourism Day visits figures below might not match those previously provided.

**Table 7.4 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) - Three Year Annual Averages**

*Source: Great Britain Day Visits Survey*

|                  | Visits (millions)  |           |           |           |           |           |           |
|------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|
|                  | 2011-2013          | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| GB               | 1,857              | 1,872     | 1,801     | 1,803     | 1,794     | 1,777     | 1,716     |
| Wales            | 112                | 108       | 97        | 97        | 96        | 99        | 94        |
| North Wales      | 27                 | 27        | 24        | 27        | 24        | 25        | 23        |
| Mid Wales        | 13                 | 15        | 15        | 13        | 11        | 11        | 12        |
| South East Wales | 47                 | 44        | 39        | 37        | 38        | 39        | 38        |
| South West Wales | 24                 | 23        | 20        | 21        | 22        | 24        | 23        |
|                  | Spend (£ millions) |           |           |           |           |           |           |
|                  | 2011-2013          | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| GB               | £ 62,498           | £ 63,161  | £ 61,938  | £ 62,560  | £ 62,765  | £ 63,378  | £ 64,402  |
| Wales            | £ 3,770            | £ 3,669   | £ 3,240   | £ 3,432   | £ 3,850   | £ 4,146   | £ 3,929   |
| North Wales      | £ 831              | £ 1,011   | £ 817     | £ 1,001   | £ 830     | £ 920     | £ 703     |
| Mid Wales        | £ 427              | £ 427     | £ 449     | £ 357     | £ 374     | £ 388     | £ 628     |
| South East Wales | £ 1,789            | £ 1,685   | £ 1,442   | £ 1,534   | £ 1,612   | £ 1,735   | £ 1,550   |
| South West Wales | £ 759              | £ 771     | £ 733     | £ 695     | £ 750     | £ 813     | £ 762     |



## Accommodation Occupancy Rates

**Table 7.5 Accommodation Occupancy Rates in Wales and in each Welsh Region - Three Year Annual Averages**

*Source: Visit Wales Occupancy Survey*

| Hotel - Room Rates          |           |           |           |           |           |           |           |           |           |           |
|-----------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
|                             | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| Wales                       | 58        | 59        | 59        | 60        | 62        | 65        | 66        | 67        | 66        | 66        |
| North Wales                 | 60        | 61        | 61        | 62        | 64        | 65        | 67        | 67        | 65        | 64        |
| Mid Wales                   | 49        | 51        | 52        | 53        | 53        | 52        | 52        | 52        | 53        | 54        |
| South East Wales            | 63        | 62        | 61        | 62        | 65        | 69        | 71        | 72        | 73        | 72        |
| South West Wales            | 54        | 53        | 52        | 50        | 55        | 59        | 63        | 63        | 63        | 65        |
| Guesthouse/B&B - Room Rates |           |           |           |           |           |           |           |           |           |           |
|                             | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| Wales                       | 37        | 36        | 35        | 34        | 34        | 35        | 36        | 38        | 37        | 37        |
| North Wales                 | 38        | 38        | 35        | 34        | 34        | 35        | 37        | 38        | 38        | 35        |
| Mid Wales                   | 31        | 33        | 33        | 33        | 30        | 30        | 29        | 29        | 29        | 31        |
| South East Wales            | 40        | 34        | 31        | 27        | 29        | 31        | 34        | 32        | 24        | 20        |
| South West Wales            | 40        | 38        | 39        | 40        | 41        | 42        | 43        | 46        | 46        | 46        |
| Self-Catering - Unit Rates  |           |           |           |           |           |           |           |           |           |           |
|                             | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| Wales                       | 48        | 50        | 51        | 52        | 51        | 50        | 51        | 53        | 55        | 57        |
| North Wales                 | 53        | 57        | 56        | 56        | 57        | 57        | 57        | 57        | 59        | 62        |
| Mid Wales                   | 44        | 45        | 47        | 49        | 45        | 45        | 47        | 51        | 51        | 51        |
| South East Wales*           | -         | -         | -         | -         | -         | -         | 48        | 49        | 48        | 49        |
| South West Wales*           | -         | -         | -         | -         | -         | -         | 48        | 52        | 54        | 56        |

*\*South East Wales and South West Wales figures not available until 2014*

| Static Caravan and Holiday Homes - Unit Rates |           |           |           |           |           |           |           |           |           |           |
|-----------------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
|                                               | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| Wales                                         | 81        | 81        | 80        | 83        | 77        | 74        | 76        | 84        | 88        | 88        |
| North Wales                                   | -         | -         | -         | -         | 69        | 57        | 48        | 42        | 44        | 45        |
| Mid Wales                                     | -         | -         | -         | -         | 57        | 58        | 47        | 57        | 57        | 70        |
| South East Wales*                             | -         | -         | -         | -         | -         | -         | -         | -         | -         | -         |
| South West Wales                              | -         | -         | -         | -         | 52        | 56        | 71        | 75        | 79        | 79        |
| Touring Caravan and Camping - Pitch Rates     |           |           |           |           |           |           |           |           |           |           |
|                                               | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| Wales                                         | 44        | 45        | 43        | 37        | 32        | 33        | 36        | 39        | 42        | 43        |
| North Wales                                   | -         | -         | -         | -         | 33        | 35        | 39        | 41        | 42        | 41        |
| Mid Wales                                     | -         | -         | -         | -         | 35        | 35        | 34        | 35        | 38        | 42        |
| South East Wales*                             | -         | -         | -         | -         | -         | -         | -         | -         | -         | -         |
| South West Wales                              | -         | -         | -         | -         | 32        | 33        | 36        | 38        | 43        | 42        |
| Hostel - Bedspace Rates                       |           |           |           |           |           |           |           |           |           |           |
|                                               | 2008-2010 | 2009-2011 | 2010-2012 | 2011-2013 | 2012-2014 | 2013-2015 | 2014-2016 | 2015-2017 | 2016-2018 | 2017-2019 |
| Wales                                         | 38        | 41        | 41        | 42        | 44        | 46        | 48        | 51        | 52        | 53        |
| North Wales                                   | 38        | 43        | 46        | 49        | 50        | 52        | 54        | 54        | 53        | 53        |
| Mid Wales                                     | 39        | 38        | 39        | 40        | 42        | 46        | 50        | 53        | 55        | 58        |
| South East Wales                              | 45        | 43        | 41        | 41        | 41        | 41        | 44        | 45        | 48        | 47        |
| South West Wales                              | 37        | 39        | 39        | 39        | 39        | 41        | 44        | 49        | 51        | 53        |

*\*South East Wales figures not shown due to small sample sizes*

## Type of Accommodation used on an Overnight Domestic GB Trip

**Table 7.6 Accommodation Categories –  
Overnight Domestic GB Trips**

*Source: Great Britain Tourism Survey*

### **Hotel/Motel**

Hotel

Motel

### **Guest house/Farmhouse/B&B**

Bed & Breakfast

Guest house

Farmhouse

### **Self catering**

Self-catering in rented flat\apartment

Self-catering in rented house\chalet\villa\bungalow\cottage

Holiday camp\village - self catering

### **Friend's home/Relative's home/Second home/Timeshare**

Friend's home

Relative's home

Own second home\timeshare

### **Caravan and Camping**

Caravan and Camping