

Introduction



This factsheet provides summary tables of key tourism figures to South West Wales in 2006, 2007 and 2008. Definitions of the terms used in this report, along with the sources of information used, can be found in the Appendix.

Volume and Value

- South West Wales attracts about 19% of all Wales' UK domestic tourism trips and related expenditure. (Table 1)
- The total of trips has fallen from 1.92 million in 2006 to 1.64 million in 2008, while expenditure has also fallen from £411 million in 2006 to £262 million in 2008. (Table 1)

Trip Characteristics

- Average length of stay in South West Wales (4.10 nights in 2008 compared with a Wales average of 3.76 nights) is the highest of all the Welsh regions. (Table 2)
- In 2008, 82% of visits were for holiday purposes. Business and Visiting Friends and Relatives each accounted for a further 8% of trips to the region. (Table 3 and Figure 1)
- 40% of all trips to the region were holidays of 1-3 nights, 36% were holidays of 4-7 nights, while 6.5% of all trips were holidays of 8+ nights' duration. (Figure 2)
- In 2008, 44% of visitors had made advanced bookings, 27% with the accommodation provider. (Table 4)
- The vast majority of the region's UK visitors come by car (85% in 2008). This is slightly higher than the Wales average of 81%. (Table 5 and Figure 3)
- Tourism to the region has a marked seasonal pattern, with around 40% of trips being taken in the July-

September quarter. This is slightly higher than the Wales average of around 37% of trips in this quarter. (Table 6)

- August is by far the peak month for the region with 23% of all trips in 2008. (Figure 4)
- Serviced accommodation (hotels, guest houses and B&Bs) was the form of accommodation used on 24% of trips to the region in 2008. Caravans were used on 24% of trips, while 10% of trips were to rented Self-Catering accommodation. Additionally, the accommodation used on 30% of trips was Friends or Relatives Home, compared with the Wales average of 28%.
- In 2008, some 32% of visitor expenditure was for accommodation (Wales average of 35%), while 22% of expenditure was on Eating Out and drinking (Wales average 18%)

Visitor profile

- 30% of visitors to the region are in the 35-44 age group. The age profile of the region's visitors is broadly in line with that for Wales as a whole. (Table 9)

Region of residence

- Over one third of visits to the South West originate from within Wales itself. This figure is the highest for all the regions of Wales. 20% of visits originate in London and the South East of England, compared with 15% for Wales as a whole. These figures reflect the region's accessibility from centres of population in South East Wales and along the M4 from the London area. (Table 10)

Occupancy

- The Occupancy statistics for the region are broadly in line with those for Wales as a whole. In 2008, the South West's average hotel room occupancy was 56% (58% in 2006 and 2007), rented self-catering

average occupancy was 52% (54% in 2007 and 51% in 2006), caravan holiday park occupancy in the April-October period was 65% (down from 70% in 2006 and 76% in 2007), while Hostel occupancy year round was at 32% – on a par with the Wales average. (Table 11)

Welsh Regions

Table 1: Regional Volume and Value

Millions									
	Trips			Bednights			Spend (£)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
North Wales	3.24	2.95	3.18	12.91	11.43	11.98	513.66	476.27	499.50
Mid Wales	1.89	1.64	1.42	7.75	6.08	5.70	283.34	199.20	241.50
South West Wales	1.92	1.90	1.64	8.55	7.87	6.72	410.89	315.32	261.86
South East Wales	2.36	2.23	2.22	6.27	5.81	6.77	387.10	364.66	385.81

Source: United Kingdom Tourism Survey 2006, 2007 and 2008. All expenditure is in historic prices.

Note: the sum of regional totals does not necessarily equate to the Wales total due to some respondents not specifying a particular region and some visiting more than one region.

Table 2: Trip Characteristics

	Average length of stay (nights)			Average spend per night (£)			Average spend per trip (£)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
North Wales	3.98	3.87	3.77	40	42	42	159	161	157
Mid Wales	4.1	3.71	4.01	37	33	42	150	121	170
South West Wales	4.45	4.14	4.10	48	40	39	214	166	160
South East Wales	2.66	2.61	3.05	62	63	57	164	164	174
Wales	3.79	3.63	3.76	45	44	44	170	160	166

Source: United Kingdom Tourism Survey 2006, 2007 and 2008. All expenditure is in historic prices.

Table 3: Purpose of Trips

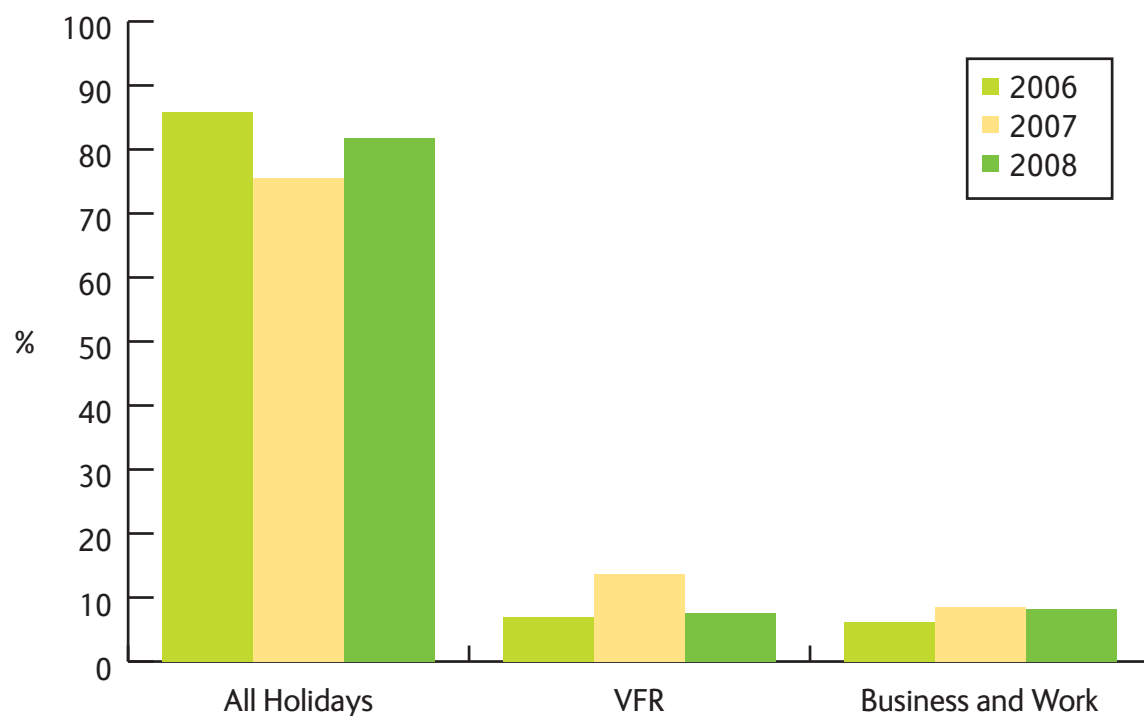
Millions									
	Trips			Bednights			Spend (£)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
All holidays	1.65	1.44	1.34	6.86	6.58	5.86	281.33	249.4	214.39
VFR ^(a)	0.13	0.26	0.12	0.34	0.79	0.28	14.3	27.5	14.22
Business/work ^(b)	0.12	0.16	0.13	1.23	0.4	0.37	114.27	31.08	28.23
Total	1.92	1.9	1.64	8.55	7.87	6.72	410.89	315.32	261.86

Source: United Kingdom Tourism Survey 2006, 2007 and 2008.

(a) Visiting friends and relatives not on holiday (b) Includes transport as employment

Figure 1: Trips by purpose (% share)

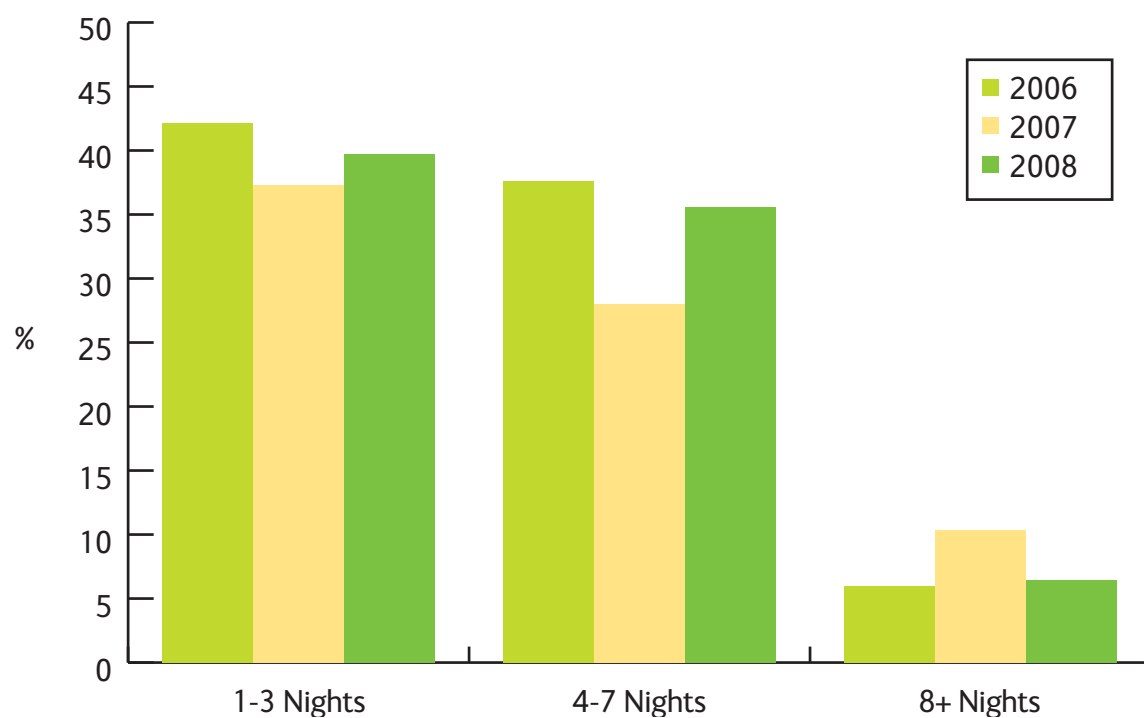
Actual values: 2006 = 1.92m; 2007 = 1.9m; 2008 = 1.64m



Source: United Kingdom Tourism Survey 2006, 2007 and 2008

Figure 2: Length of all holiday trips (% share)

Actual values: 2006 = 1.65m; 2007 = 1.44m; 2008 = 1.34m



Source: United Kingdom Tourism Survey 2006, 2007 and 2008

Table 4: Advance booking methods

%	2006	2007	2008
All advance firm bookings	46.64	46.88	43.83
Accommodation provider	30.17	28.07	27.28
Booked online	14.23	22.27	19.84
Transport provider	7.79	5	4.65
Tour operator or travel company	3.73	4.73	7.39
A high street or on-line travel agent	3.04	1.05	0.33
Other source	1.5	8.11	5.83
Tourist Board or Tourist Information Centre	0.83	1.77	0.88
Did not make any firm bookings before trip	48.16	45.28	45.63
Don't know	5.2	7.84	10.54

Source: United Kingdom Tourism Survey 2006, 2007 and 2008

Table 5: Transport used on longest part of journey

Millions									
	Trips			Bednights			Spend (£)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Car	1.69	1.56	1.4	7.66	6.71	5.58	364.65	254.01	200.21
Train	0.03	0.12	0.1	0.14	0.43	0.51	8.89	18.13	26.52
Organised coach	0.03	0.05	0.01	0.15	0.2	0.04	6.64	9.05	2.97
Bus/coach	0.01	0.04	0.04	0.05	0.13	0.18	6.58	5.5	6.78
Plane	0.03	0.06	0.03	0.09	0.17	0.07	4.99	18.82	13.37
Other	0.12	0.08	0.05	0.46	0.23	0.34	19.14	9.82	12
Total	1.92	1.9	1.64	8.55	7.87	6.72	410.89	315.32	261.86

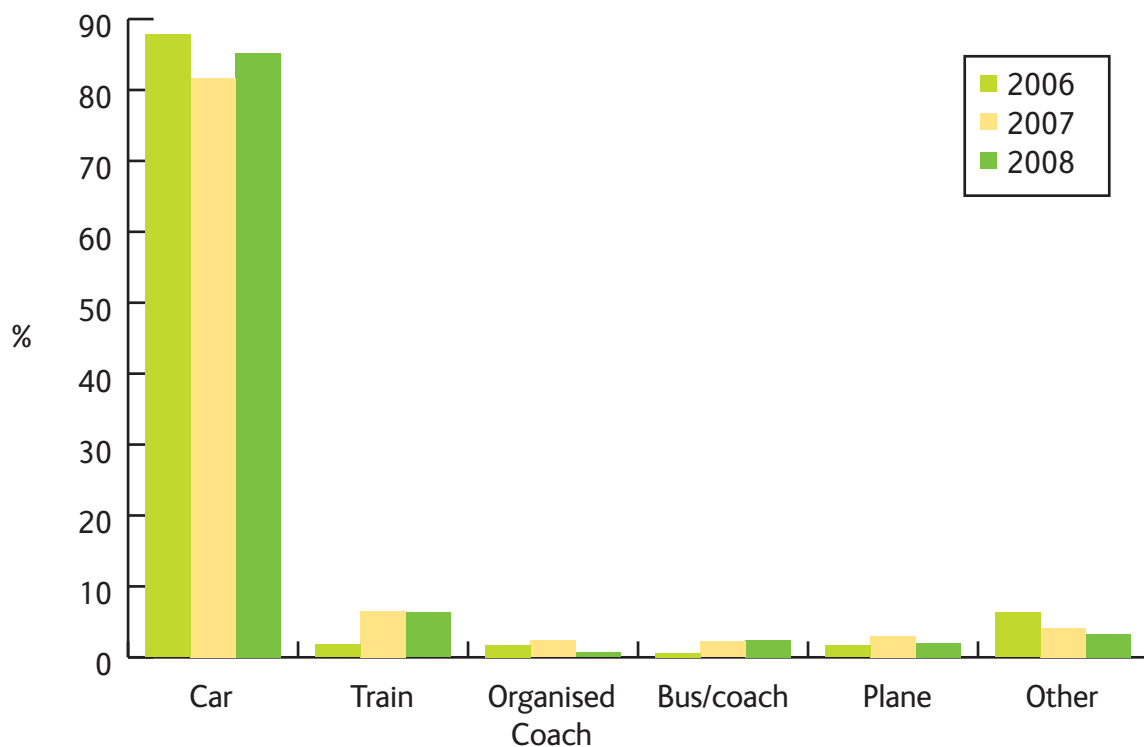
Source: United Kingdom Tourism Survey 2006, 2007 and 2008

Table 6: Time of visit by quarter

Millions									
	Trips			Bednights			Spend (£)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Jan - Mar	0.12	0.19	0.28	1.43	0.6	0.71	116.35	33.43	40.58
April - June	0.65	0.58	0.47	2.48	2.43	1.83	106.41	81.83	78.7
July - Sept	0.77	0.7	0.66	3.52	3.49	3.36	138.18	133.95	101.58
Oct - Dec	0.38	0.43	0.24	1.13	1.36	0.81	49.96	66.12	41
Total	1.92	1.90	1.64	8.55	7.87	6.72	410.89	315.32	261.86
% share									
Jan - Mar	6.22	9.98	17.06	16.69	7.59	10.6	28.32	10.6	15.5
April - June	33.66	30.37	28.48	29.01	30.87	27.25	25.9	25.95	30.05
July - Sept	40.27	36.92	39.9	41.15	44.29	50.04	33.63	42.48	38.79
Oct - Dec	19.85	22.74	14.56	13.16	17.25	12.11	12.16	20.97	15.66

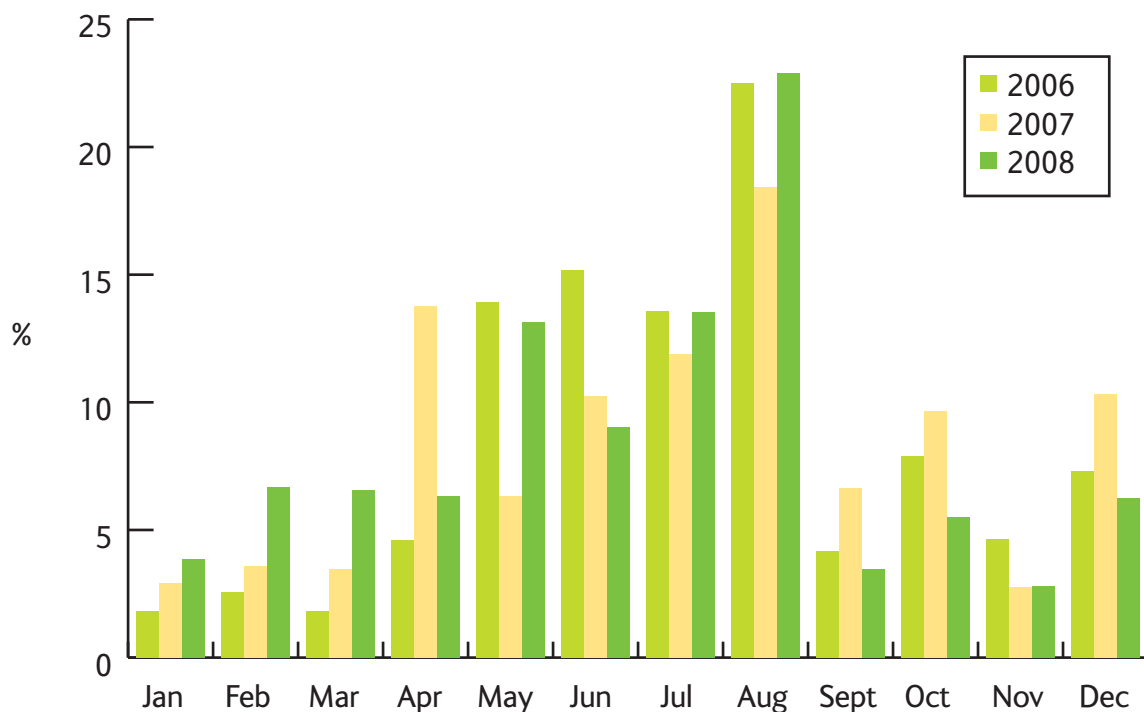
Source: United Kingdom Tourism Survey 2006, 2007 and 2008

Figure 3: Transport used on longest part of journey (% share of trips)



Source: United Kingdom Tourism Survey 2006, 2007 and 2008

Figure 4: Month trip started (% share of trips)



Source: United Kingdom Tourism Survey 2006, 2007 and 2008

*Dates of Easter: 14-17 April 2006; 6-9 April 2007; 21-24 March 2008.

Table 7: Accommodation Used

									Millions
	Trips			Bednights			Spend (£)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Friends /relatives home	0.55	0.64	0.5	1.91	2.45	1.74	44.86	65.3	56.86
Hotel/Motel/Guest house	0.29	0.33	0.3	1.81	0.8	0.85	169.79	62.65	70.37
All Caravans	0.52	0.35	0.39	2.07	2.05	2.24	68.53	62.32	47.23
Towed	0.22	0.15	0.07	0.85	0.99	0.46	23.14	25.25	11.89
Static Owned	0.17	0.14	0.21	0.59	0.76	1.25	19.48	20.35	22.24
Static Not-Owned	0.13	0.06	0.11	0.64	0.3	0.53	25.91	16.71	13.10
Self-catering in Rented ^(a)	0.21	0.21	0.16	1.36	1.23	0.8	72.92	51.3	38.43
B&B/farm/private house	0.08	0.17	0.1	0.25	0.49	0.34	19.41	38.35	27.26
Camping	0.13	0.18	0.16	0.58	0.2	0.51	15.94	5.66	11.87
Holiday camp/village	0.04	0.03	0.02	0.19	0.17	0.07	8.14	6.3	4.75
Hostel/University/School	0	0	0	0	0	0	0	0	0
									% share
Friends /relatives home	28.63	33.63	30.25	22.33	31.12	25.85	10.92	20.71	21.72
Hotel/Motel/Guest house	15.1	17.34	18.1	21.16	10.16	12.64	41.32	19.87	26.87
All Caravans	27.59	18.39	23.52	24.2	26.04	33.26	16.68	19.76	18.03
Towed	11.45	7.88	4.56	9.94	12.57	6.82	5.63	8.01	4.54
Static Owned	8.85	7.35	12.54	6.9	9.65	18.55	4.74	6.45	8.49
Static Not-Owned	6.77	3.15	6.42	7.48	3.81	7.89	6.31	5.3	5
Self-catering in Rented ^(a)	11.45	11.04	9.73	15.9	15.62	11.86	17.75	16.27	14.68
B&B/farm/private house	4.16	8.93	5.89	2.92	6.22	5.1	4.72	12.16	10.41
Camping	6.77	4.2	9.52	6.8	2.54	7.53	3.88	1.79	4.53
Holiday camp/village	2.08	1.58	1.12	2.22	2.16	0.97	1.98	2	1.81
Hostel/University/School	0	0	0	0	0	0	0	0	0

Source: United Kingdom Tourism Survey 2006, 2007 and 2008.

(a) 'Rented' includes: flat/apartment/house/chalet/villa/bungalow/cottage.

Table 8: Detail of spend (breakdown)

			%
	2006	2007	2008
Accommodation	40.02	29.35	31.81
Eating and drinking out	21.09	20.80	22.01
Travel costs to and from destination, and during the trip	13.88	17.51	19.28
Other shopping	11.12	13.33	11.18
Buying clothes	4.76	6.42	5.27
Entertainment	3.79	7.99	5.76
Price of package holiday/inclusive trip	3.49	3.14	2.39
Services or advice (e.g. travel guides, tourist information)	0.10	0.07	0.23

Source: United Kingdom Tourism Survey 2006, 2007 and 2008.

Table 9: UK visitor profile to Wales

	%								
	Trips			Bednights			Spend		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Age									
16-24	9.43	8.95	8.91	20.18	6.98	6.34	34.02	8.21	6.61
25-34	16.13	11.48	18.94	15.17	9.6	21.09	10.49	12.57	17.83
35-44	27.63	29.94	29.73	22.3	32.82	36.87	16.58	28.11	30.59
45-54	16.49	20.73	14.09	14.13	16.9	9.06	13.47	18.42	16.24
55-64	17.04	16.02	14.99	14.17	19.52	11.71	12.63	21.76	14.85
65+	13.28	12.88	13.34	14.06	14.17	14.92	12.81	10.93	13.89
Gender									
Male	46.55	45.74	49.28	48.18	47.68	49.73	59.19	51.37	56.27
Female	53.45	54.26	50.72	51.82	52.32	50.27	40.81	48.63	43.73
Social Class									
AB	29.87	39.11	35.88	37.71	39.53	32.5	50.95	37.89	41.37
C1	38.61	33.18	22.56	32.68	33.77	27.68	27.5	34.82	25.21
C2	16.02	14.07	20.18	13.72	14.11	18.32	10.69	14.77	16.33
DE	15.5	13.64	21.37	15.9	12.6	21.5	10.86	12.52	17.09
Working Status									
30 hours or more per week	47.14	47.74	47.99	45.9	42.69	44.55	54.41	51.6	54.56
Less than 30 hours per week	15.17	14.84	14.29	16.59	14.96	18.5	10.94	15.62	13.14
Retired from full time job	20.12	20.02	21.56	19.63	24.76	21.91	20.12	20.3	22.53
Not working for some other reason	17.58	17.4	16.16	17.88	17.59	15.03	14.52	12.49	9.77

Source: United Kingdom Tourism Survey 2006, 2007 and 2008

Table 10: Visitor Region of Residence

	%								
	Trips			Bednights			Spend (£)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Wales	39.18	27.33	35.16	28.88	22.9	36.06	23.52	18.92	22.81
England (net)	59.7	68.79	63.36	70.08	73.61	61.75	74.48	76.59	73.17
North West	14.75	16.54	12.81	14.55	22.07	11.94	12.84	22.84	13.08
West Midlands	12.34	12.21	10.03	10.74	11.07	10.71	6.85	11.33	11.28
South East*	11.38	12.59	10.67	11.32	12.86	11.24	10.31	12.93	11.9
South West	6.46	5.85	8.96	7.01	5.6	8.14	8.05	5.38	13.48
London	4.42	5.11	4.36	15.34	5.85	6.38	28.01	4.66	6.38
East Midlands	4.17	7.02	5.29	5.48	5.02	5.51	4.53	9.9	7.86
East of England	3.54	6.98	7.21	3.09	7.17	4.82	2.14	6.48	5.06
Yorks & Humber	2.25	2.23	3.02	1.95	3.64	2.2	1.18	2.35	3.07
North East	0.38	0.26	1.01	0.6	0.31	0.81	0.56	0.71	1.07
Scotland	0.49	3.39	1.48	0.33	2.77	2.2	0.27	3.57	4.02
Northern Ireland	0.63	0.5	-	0.71	0.72	-	1.74	0.93	-

Source: United Kingdom Tourism Survey 2006, 2007 and 2008. *excludes London



Table 11: Occupancy (domestic & overseas)

	Hotel ^(e)			Guest House/B&B ^(b)			Self catering ^(c)			Static Park ^(d)			Touring pitches ^(e)			Hostel ^(f)
	'06	'07	'08	'06	'07	'08	'06	'07	'08	'06	'07	'08	'06	'07	'08	'08
Jan	38	41	38	21	16	21	17	13	42	-	-	-	-	-	-	-
Feb	47	49	51	27	25	29	35	33	50	-	-	-	-	-	-	15
Mar	49	50	54	28	31	35	27	43	49	-	-	-	-	-	-	24
Apr	60	58	56	42	41	35	53	51	45	58	57	52	22	25	27	35
May	66	65	64	55	55	49	61	70	53	40	72	62	22	34	51	53
Jun	66	68	64	64	56	54	69	73	53	62	79	67	38	42	58	57
Jul	72	68	65	71	61	64	81	84	72	88	84	73	55	46	70	62
Aug	79	78	69	81	73	70	97	96	90	93	97	91	80	74	76	79
Sept	71	70	65	60	60	55	72	70	66	84	82	67	25	39	43	28
Oct	62	60	54	48	41	41	50	55	44	64	61	30	15	15	38	27
Nov	51	49	44	27	22	26	22	28	22	-	-	-	-	-	-	4
Dec	42	40	40	29	17	19	31	34	39	-	-	-	-	-	-	4
Ave	58	58	56	48	43	43	51	54	52	70	76	65	37	33	56	32

(a) Room occupancy

(b) Room occupancy

(c) Occupancy is measured at the individual property level by expressing the number of weeks let each month as a proportion of the weeks and units available for rent

(d) Percentage of available caravans and/or chalets occupied. Note: static parks and touring pitches are generally closed November to March

(e) Pitch occupancy

(f) Only 2008 data available

Note: Care must be taken when comparing non-serviced 2008 data with previous years due to a change of contractor carrying out the survey.

Appendix

Sources:

- United Kingdom Tourism Survey (UKTS) for 2006, 2007 and 2008
- Attractions Survey 2008
- Occupancy Survey 2006, 2007 and 2008
- Tourist Information Centres
- Annual Business Inquiry (StatsWales)

The UKTS is sponsored jointly by the Welsh Assembly Government and the National Tourist Boards for Scotland, England and Northern Ireland.

In this publication percentage figures may not add up to 100% due to rounding and, as with all surveys, the data are subject to sampling errors. Percentages are based on rounded figures to 2 decimal places. The confidence with which researchers generally wish to make estimates is 95% that is, they wish to be sure that there is only a 5% chance that the estimate has been obtained by chance. The below table shows the predicted ranges or variations for the different samples and key variables:

Table A. Confidence limits for UKTS 2006, 2007 and 2008

	Trips			Bednights			Spend (£)			%
	2006	2007	2008	2006	2007	2008	2006	2007	2008	
UK	1.5	2.0	2.3	3.2	3.1	3.2	2.8	2.1	3.0	
England	1.9	2.1	2.5	3.0	2.3	3.2	2.2	2.1	3.3	
Scotland	3.6	7.1	5.6	11.3	11.2	8.0	10.2	8.1	8.7	
Wales	2.0	8.2	5.5	10.2	10.3	9.9	9.7	11.2	9.4	

Source: United Kingdom Tourism Survey 2006, 2007 and 2008

Further information

For more information please contact:

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Definitions:

'A tourist trip' is defined as a stay of one or more nights away from home for holidays, visits to friends or relatives, business/conference trips or any other purposes except such activities as boarding education or semi-permanent employment.

'Tourist nights' are those spent away from home using any type of accommodation, or in transit, on a trip (as above).

'Tourist expenditure' is spending incurred while away from home on a tourist trip and on advance payments for such items as fares and accommodation. In this fact sheet expenditure is shown in historic prices.

