

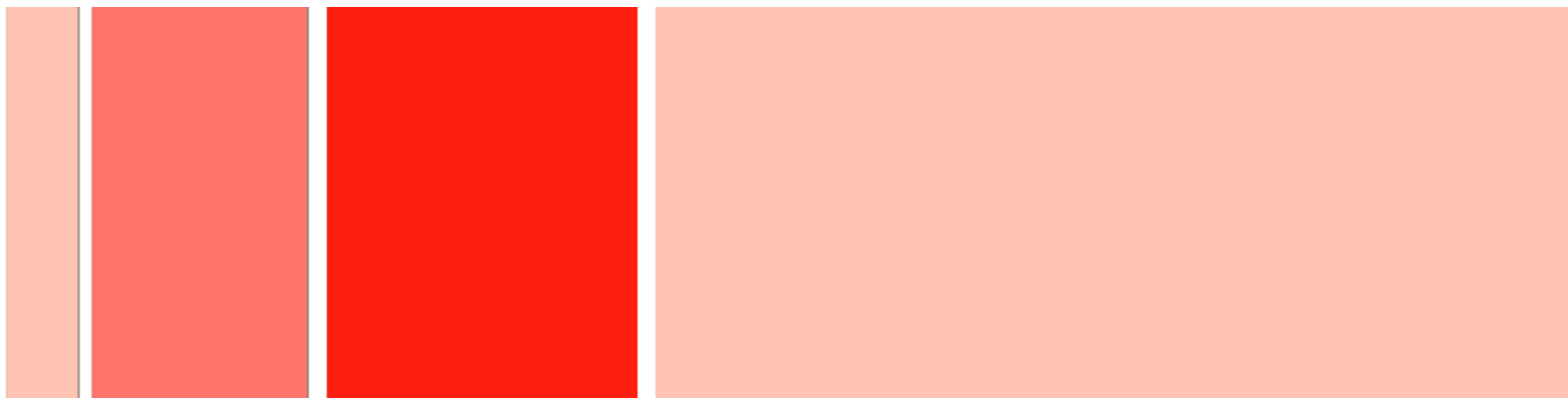
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Tourism Profile – Mid Wales 2014 - 2016



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Researcher: Birgitte Magnussen

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

For further information please contact:

Birgitte Magnussen

Visit Wales

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

0300 062 5296

Email: birgitte.magnussen@gov.wales

This report contains tourism-related data for the South West Wales region for the period 2014-2016 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. 2016 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, occupancy rates, bedstock supply information as well as employment statistics covering the tourism sector, one of the Welsh Government's nine priority sectors

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1. Overview and Key Points



During 2014-2016, Mid Wales accounted for 18 per cent of overnight domestic GB trips, 10 per cent if international visits and 12 per cent of Tourism Day visits to Wales.

Overall, the annual average of all tourism visits (overnight domestic GB trips, international visits and Tourism Day visits) to Mid Wales decreased by 11 per cent to 13,182 thousand, while expenditure decreased by 6 per cent to £663 million. In comparison, the volume of visitors for all Wales remained unchanged at 0 per cent, while tourism related expenditure increased by 4 per cent to £5,639 million. *Please refer to [Table 1.0](#)*

The annual average volume of overnight domestic GB trips between 2013-2015 and 2014-2016 to Mid Wales decreased by 1 per cent to 1,750 thousand, whereas for all Wales it decreased by 2 per cent to 9,919 thousand. In addition, over the same period, tourism related expenditure in Mid Wales increased by 1 per cent to £311 million, while

it remained unchanged for all Wales at £1,800 million. *Please refer to [Table 1.1](#)*

Of all the Welsh regions, Mid Wales had the highest annual average increase between 2013-2015 and 2014-2016 in the volume of international visits and related expenditure, both up by 14 per cent to 98,000 and £45 million. On the other hand, during the same period, the volume of international visits to all Wales increased by 7 per cent to 992,000, while related expenditure increased by 8 per cent to £407 million. *Please refer to [Table 1.2](#)*

Although the annual average volume of Tourism Day visits between 2013-2015 and 2014-2016 to all Wales remained unchanged at 97 million, it decreased in Mid Wales by 13 per cent to 11 million. A similar trend is seen with tourism related expenditure, with a 6 per cent increase in all Wales to £3,432 million, but a 13 per cent decrease in Mid Wales to £307 million. *Please refer to [Table 1.3](#)*

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

Spend (£ millions)			
	2013-2015	2014-2016	% change
GB	107,125	108,118	+1
Wales	5,418	5,639	+4
North Wales	1,611	1,779	+10
Mid Wales	702	663	-6
South East Wales	1,971	2,132	+8
South West Wales	1,163	1,172	+1

Source: Great Britain Tourism Survey, Great Britain Day Visits Survey and the International Passenger Survey

Table 1.1 Volume of Overnight Domestic GB Trips (000s) and Related Expenditure (£ millions) - Three Year Annual Averages

Trips (000s)			
	2013-2015	2014-2016	% change
GB	120,524	119,374	-1
Wales	10,127	9,919	-2
North Wales	3,713	3,626	-2
Mid Wales	1,763	1,750	-1
South East Wales	2,473	2,471	0
South West Wales	2,081	2,014	-3
Spend (£ millions)			
	2013-2015	2014-2016	% change
GB	23,603	23,532	0
Wales	1,802	1,800	0
North Wales	639	639	0
Mid Wales	309	311	+1
South East Wales	418	421	+1
South West Wales	386	387	0

Source: Great Britain Tourism Survey

Table 1.2 Volume of International Visits (000s) and Related Expenditure (£ millions) - Three Year Annual Averages

Visits (000s)			
	2013-2015	2014-2016	% change
GB	34,397	36,037	+5
Wales	924	992	+7
North Wales	253	274	+8
Mid Wales	87	98	+14
South East Wales	467	497	+6
South West Wales	191	205	+7
Spend (£ millions)			
	2013-2015	2014-2016	% change
GB	21,583	22,027	+2
Wales	376	407	+8
North Wales	82	88	+7
Mid Wales	39	45	+14
South East Wales	175	178	+2
South West Wales	76	90	+19

Source: International Passenger Survey

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

Visits (millions)			
	2013-2015	2014-2016	% change
GB	1,801	1,803	0
Wales	97	97	0
North Wales	26	28	+5
Mid Wales	13	11	-13
South East Wales	38	37	-3
South West Wales	21	21	+3
Spend (£ millions)			
	2013-2015	2014-2016	% change
GB	61,938	62,560	+1
Wales	3,240	3,432	+6
North Wales	889	1,052	+18
Mid Wales	354	307	-13
South East Wales	1,379	1,533	+11
South West Wales	701	694	-1

Source: Great Britain Day Visits Survey

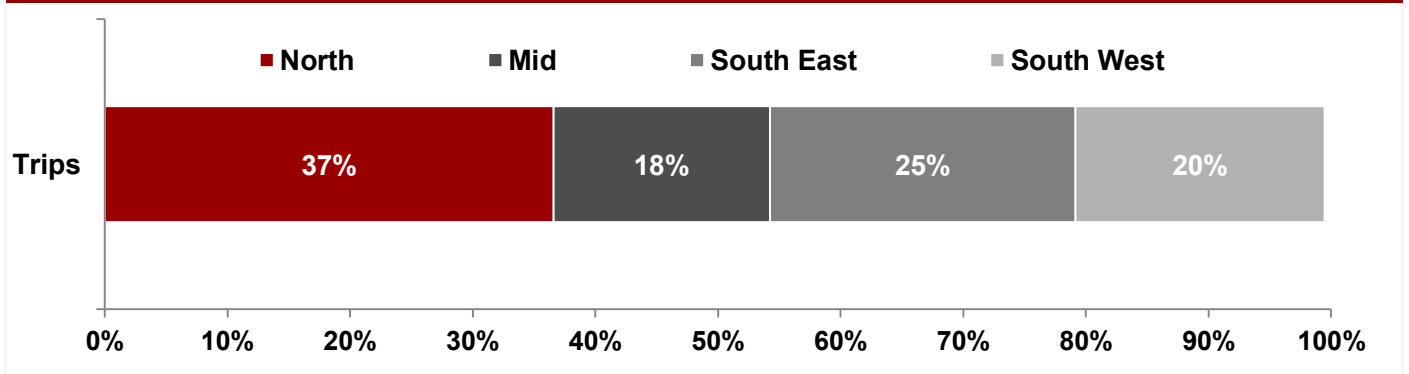
*Please note that since 2016 there have been several revisions to the way this survey has been carried out which has affected the comparability of 2011-2015 figures with those from 2016 onwards. To remedy this, figures pre-2016 have been reweighted by +15 per cent in order to be able to compare them.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

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 averages taken over three years, 2014-2016, unless stated otherwise.

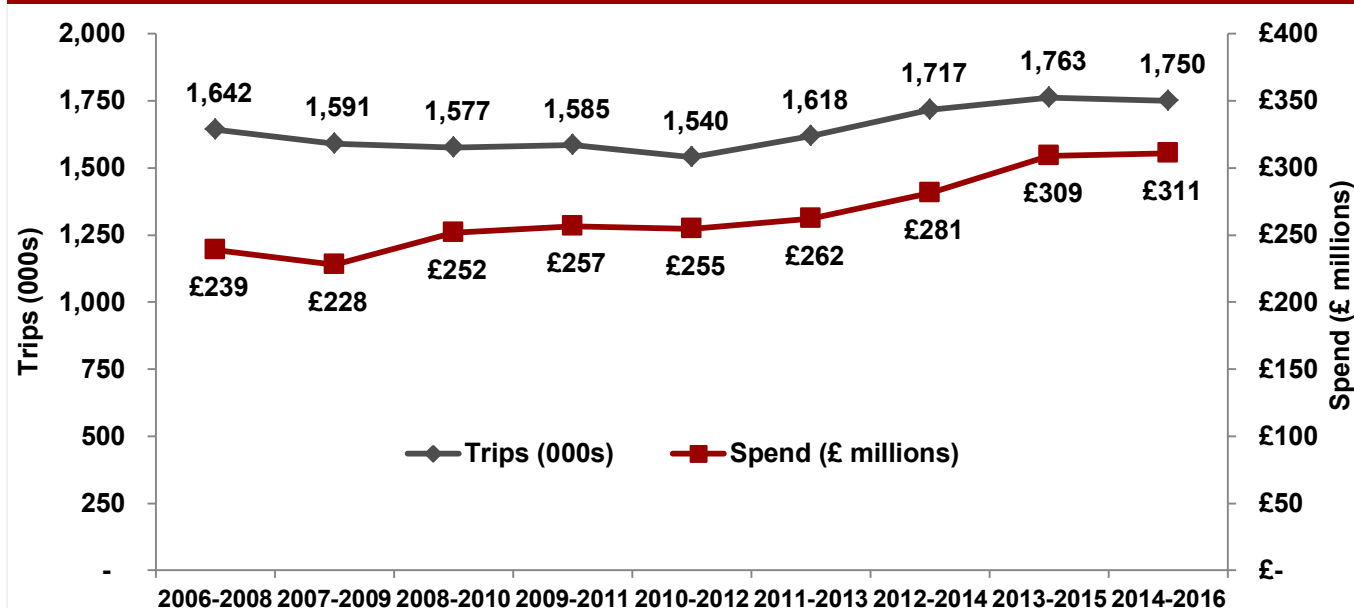
Over the period of 2014-2016, Mid Wales received an average of 1,750,000 domestic overnight visitors per year. Over this same period these visitors contributed £311 million per year to the Welsh economy. Mid Wales received 18 per cent of all overnight domestic visitors to Wales.

Figure 1.0 Proportion (%) of Overnight Domestic GB Trips to Wales by Welsh Region – Annual Average 2014-2016



Volume of Trips and Related Expenditure

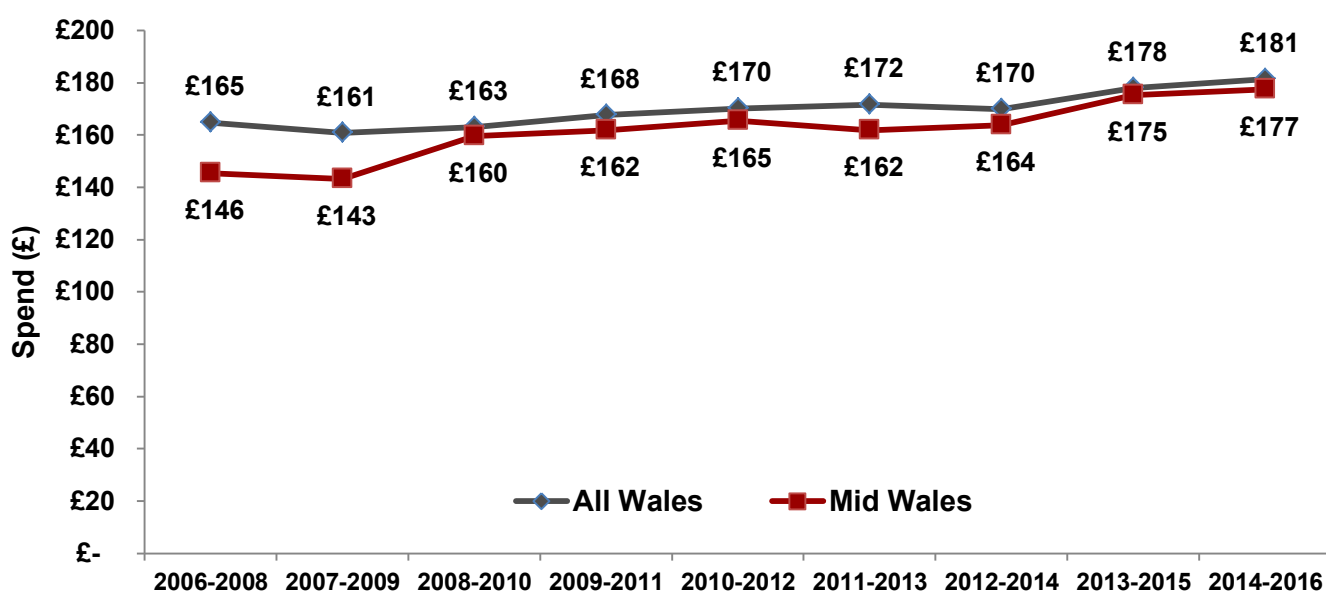
Figure 1.1 Overnight Domestic GB Trips (000s) and Related Expenditure (£ millions) to Mid Wales – Three Year Annual Averages



Spend generated by overnight domestic GB visitors in Mid Wales has continued to grow over the years, reaching £311 million in 2014-2016. From 2010-2012 to 2013-2015 there have been continued increases in the volume of trips to Mid Wales, with minor decreases in 2014-2016.

Average Spend per Trip

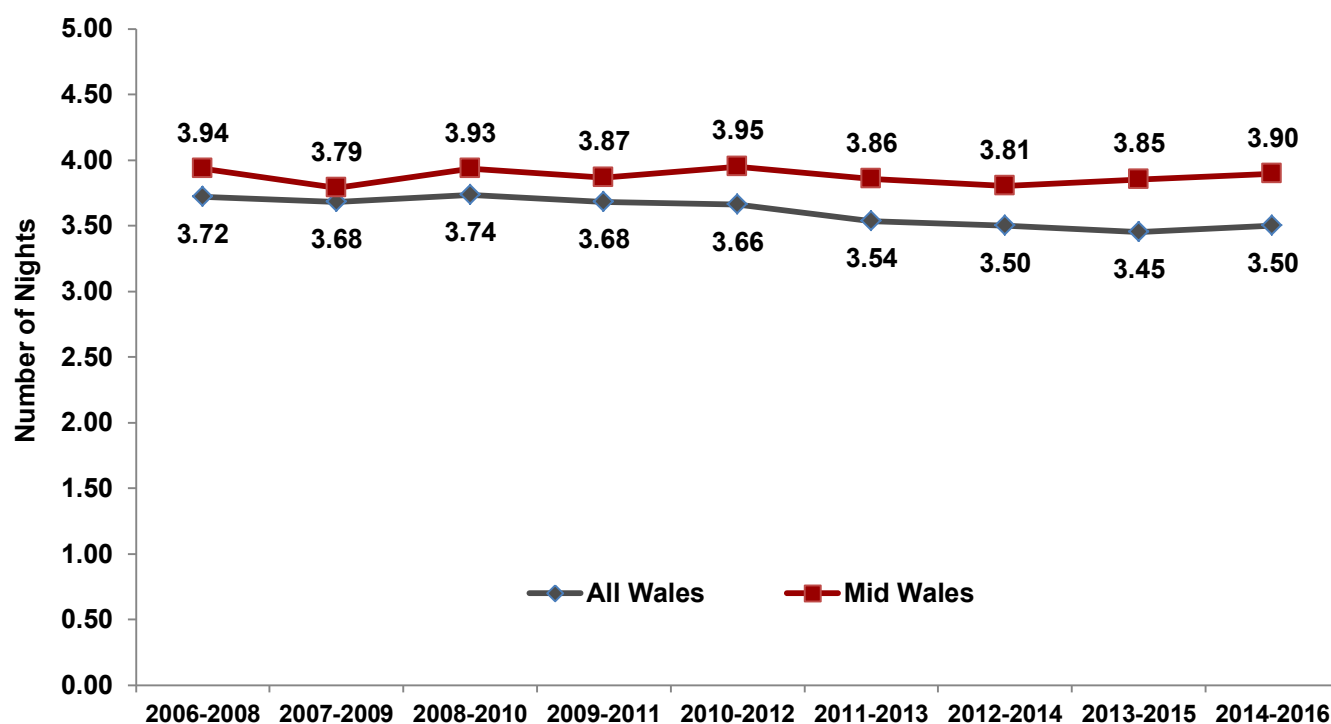
Figure 1.2 Average Spend per Overnight Domestic GB Trip (£) to Wales and Mid Wales - Three Year Annual Averages



Average spend per overnight domestic GB trip has continuously increased post 2011-2013, reaching £177 per trip in 2014-2016, just under the all Wales average of £181.

Average Number of Nights per Trip

Figure 1.3 Average Numbers of Nights per Overnight Domestic GB Trip to Wales and Mid Wales – Three Year Annual Averages



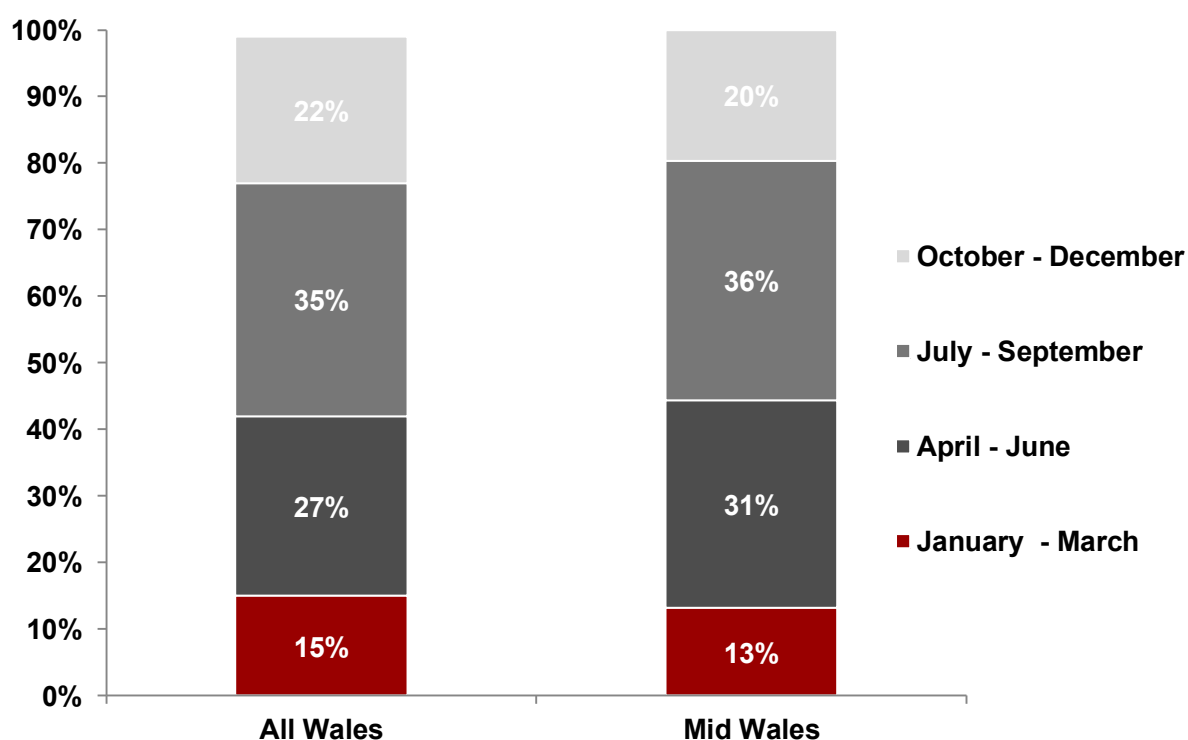
The average number of nights per overnight domestic GB trip to both Mid Wales and Wales overall has fluctuated over the years. The average number of nights taken on a trip to Mid Wales has consistently remained above the overall for Wales, with an average of 3.90 nights spent in Mid Wales per trip in 2014-2016 compared to 3.50 in all Wales over the same period.

Seasonality of Trips

Figure 1.5 for Mid Wales reflects typical high and low season periods. Overnight domestic GB visitors tended to arrive during the summer months of July-September (36 per cent) or April-June (31 per cent), with Easter usually to falling during the month of April.

During 2014-2016 Wales overall tended to have a slightly higher proportion than Mid Wales of visitors arriving between January-March (15 per cent and 13 per cent respectively) and October-December (22 per cent and 20 per cent respectively).

Figure 1.4 Proportion (%) of Overnight Domestic GB Trips to All Wales and Mid Wales by Season - Annual Average 2014-2016



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 +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.

The 2016 Great Britain Tourism Survey used different category names for accommodation types to those in 2014 and 2015. Please refer to [Table 3.9](#) for a full list categories that have been included under NET to calculate three year averages.

Table 1.4 Volume of Overnight Domestic GB Trips (000s) by Type of Accommodation Used during a trip to Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Trips	9,919	1,750
Hotel/Motel (NET)	2,233	202
Guest house/Farmhouse/B&B (NET)	836	167
Self catering (NET)	1,169	282
Friend's home/Relative's home/Second home/Timeshare	2,938	390
Caravan and Camping (NET)	2,496	657

In 2014-2016, the most popular type of accommodation used on overnight domestic GB trips to Mid Wales was 'Caravan and Camping (NET)' with over a third trips (38 per cent, 657 thousand) involving this type of accommodation. On the other hand, during the same period, the most popular accommodation type used in all Wales was a 'Friend's home/Relative's home/Second home/Timeshare' (30 per cent, 2,938 thousand trips).

Figure 1.5 Proportion (%) of Overnight Domestic GB Trips to All Wales and Mid Wales by Type of Accommodation - Annual Average 2014-2016

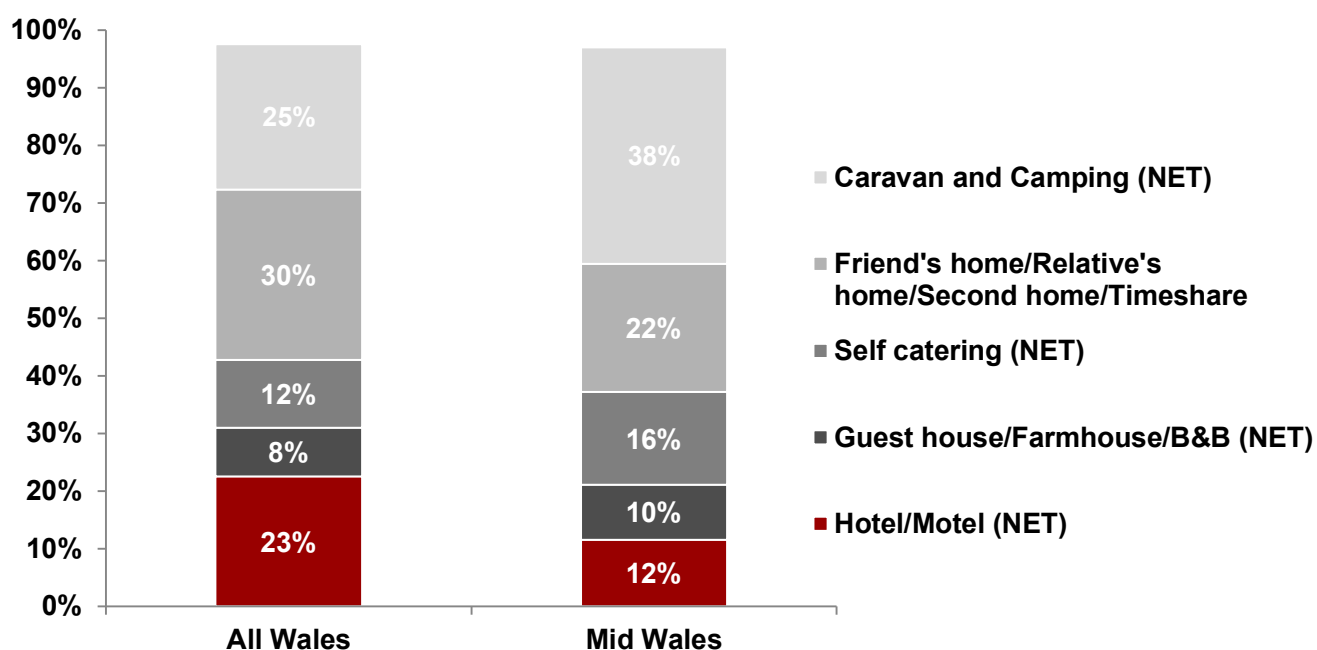


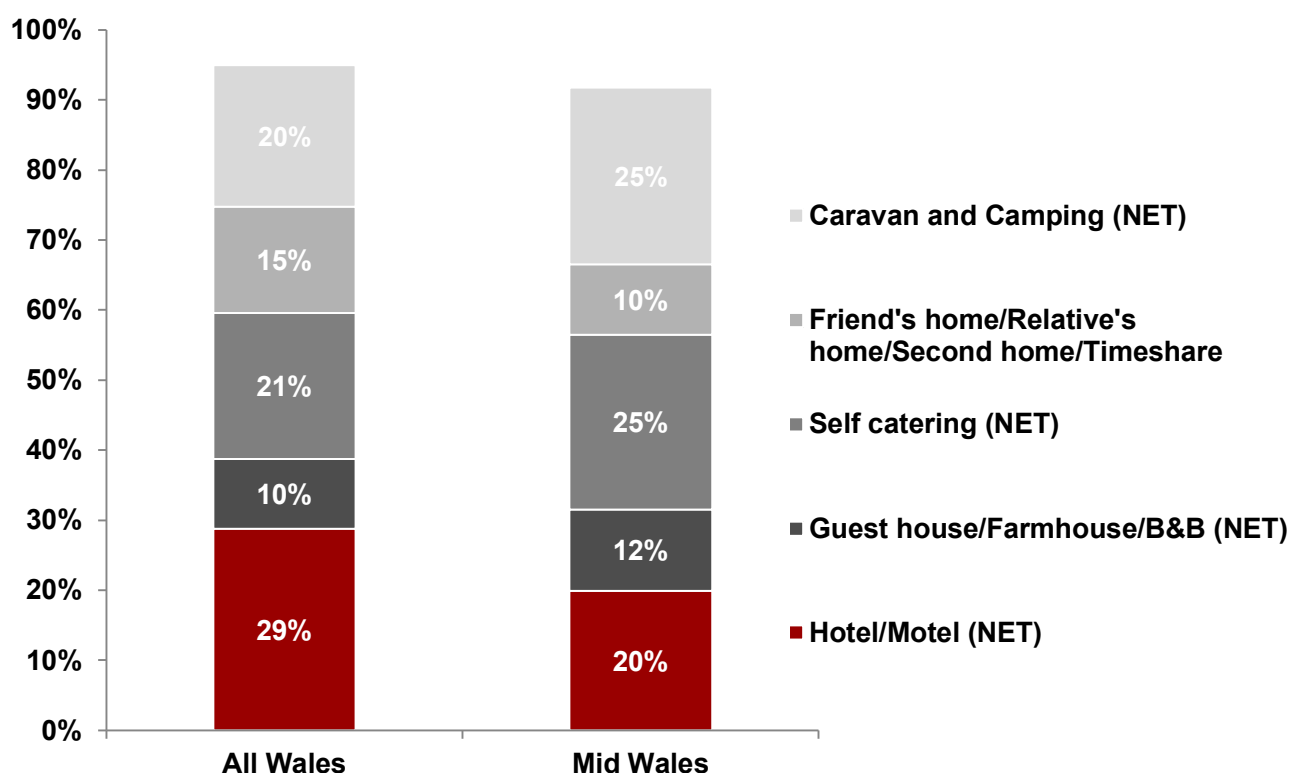
Table 1.5 Value of Related Expenditure (£ millions) from Overnight Domestic GB Trips by Type of Accommodation Used during a trip to Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Spend	1,800	311
Hotel/Motel (NET)	518	62
Guest house/Farmhouse/B&B (NET)	178	36
Self catering (NET)	376	77
Friend's home/Relative's home/Second home/Timeshare	272	31
Caravan and Camping (NET)	362	78

As seen in Figure 1.5, although 'Friend's home/Relative's home/Second home/Timeshare' included a considerable share of volume of trips, 22 per cent for Mid Wales and 30 per cent for all Wales, it contributed to a much smaller proportion of related expenditure, 12 per cent in Mid Wales and 15 per cent in all Wales. This is not surprising, as this type of accommodation does not tend to involve a high cost as it is the visitor's family and friends.

In both Mid Wales and all Wales, 'Hotel/Motel (NET)' contributed to a higher proportion of related expenditure than volume of trips. For example in Mid Wales, 'Hotel/Motel (NET)' was responsible for 12 per cent of trips (202,000) but contributed to 20 per cent (£62 million) of all expenditure.

Figure 1.6 Proportion (%) of Related Expenditure of Overnight Domestic GB Trips to All Wales and Mid Wales by Type of Accommodation - Annual Average 2014-2016



Purpose of Trip

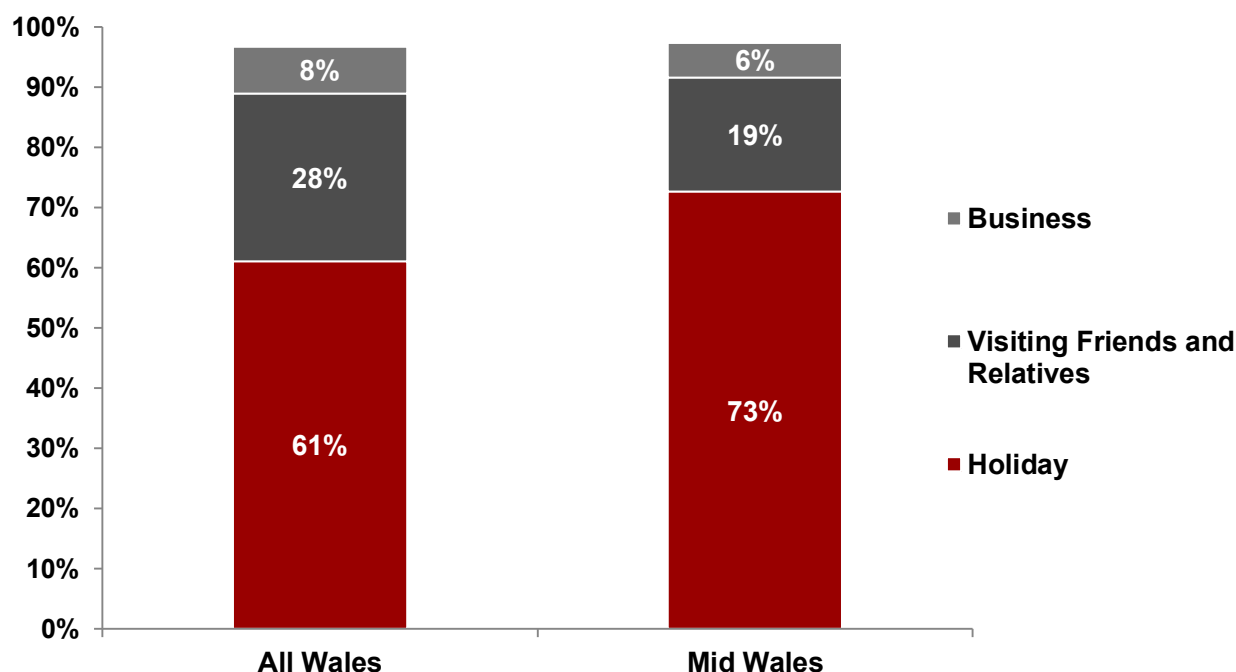
Table 1.6 Volume of Overnight Domestic GB Trips (000s) by Purpose of Trip to All Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Trips	9,919	1,750
Holiday	6,065	1,272
Visiting Friends and Relatives	2,755	332
Business	779	101

During 2014-2016, Mid Wales had the highest proportion of overnight domestic GB trips visiting for a holiday in Wales (73 per cent), with the average for Wales overall being 61 per cent.

In contrast, over the same period, 28 per cent of overnight domestic GB trips to all Wales were taken to visit friends and relatives, compared to 19 per cent in Mid Wales.

Figure 1.7 Proportion (%) of Trips to All Wales and Mid Wales by Purpose of Trip – Annual Average 2014-2016



**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'.*

Type of Place Visited

Table 1.7 Volume of Overnight Domestic GB Trips (000s) by Type of Place Visited to All Wales and Mid Wales – Annual Average 2014-2016

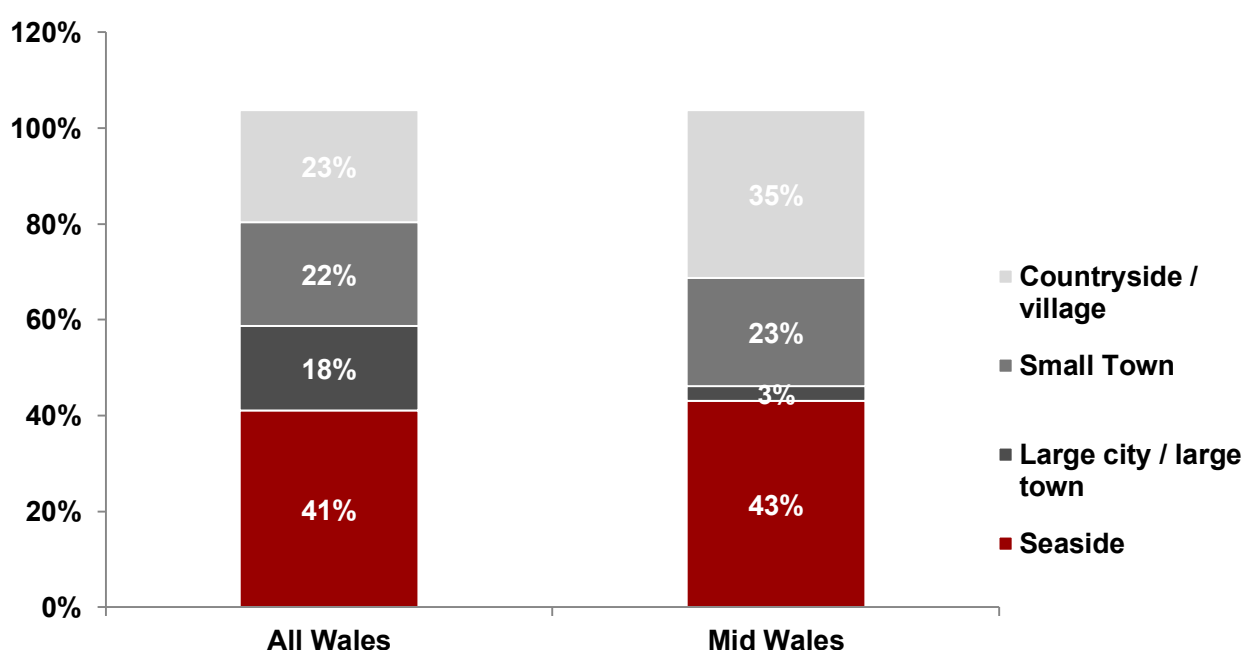
	All Wales	Mid Wales
Total Trips	9,919	1,750
Seaside	4,076	755
Large city / large town	1,747	53
Small town	2,143	394
Countryside / village	2,320	612

In 2014-2016 the most popular destination for overnight domestic GB visitors to Mid Wales was the seaside (43 per cent). In addition, 35 per cent of visitors to Mid Wales visited the countryside/village, a much higher proportion than the overall Wales average of 23 per cent.

The least popular destination to visit on an overnight domestic GB trip to Mid Wales in 2014-2016 was a large city or town (3 per cent) - the lowest proportion of all the Welsh regions. In contrast, 18 per cent of all overnight domestic GB trips to Wales were to this type of location..

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'.

Figure 1.8 Proportion (%) of Overnight Domestic GB Trips by Type of Place Visited to All Wales and Mid Wales – Annual Average 2014-2016



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

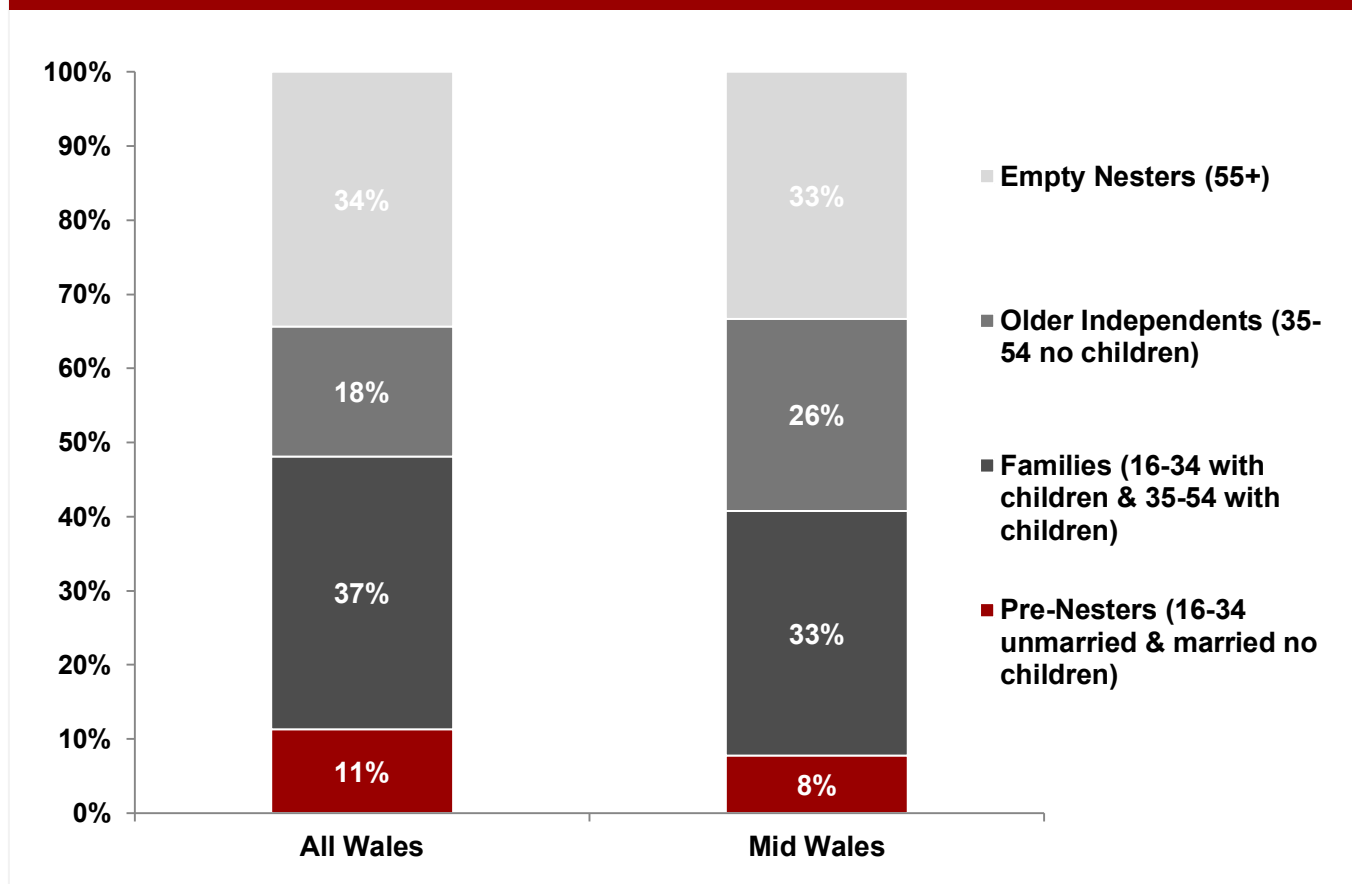
Lifestage

Table 1.8 Volume of Overnight Domestic GB Holiday Trips (thousands) by Lifestage to All Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Holiday Trips	6,065	1,272
Pre-Nesters (16-34 unmarried & married no children)	685	98
Families (16-34 with children & 35-54 with children)	2,234	420
Older Independents (35-54 no children)	1,063	330
Empty Nesters (55+)	2,083	423

During 2014-2016, the majority of overnight domestic GB holiday trips to Mid Wales were made by families (33 per cent) and empty nesters (33 per cent). Furthermore, Mid Wales had a higher proportion of older independents (26 per cent) compared to Wales overall (18 per cent). In contrast, Mid Wales had a lower proportion of pre-nesters (8 per cent) compared to the all Wales average of 11 per cent.

Figure 1.9 Proportion (%) of Overnight Domestic GB Holiday Trips to All Wales and Mid Wales by Lifestage– Annual Average 2014-2016



Region of Origin

Table 1.9 Volume of Overnight Domestic GB Trips (000s) by Region of Origin to All Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Trips	9,919	1,750
Scotland	101	14
Wales	2,048	298
England	7,766	1,438
North East England	161	26
North West England	1,885	198
Yorkshire and the Humber	499	40
East Midlands	537	70
West Midlands	1,716	619
East of England	369	59
London	611	87
South East England	909	142
South West England	1,079	197

For 2014-2016, Mid Wales when compared to Wales overall, had a smaller proportion of overnight domestic GB trips originating from Wales (17 per cent and 21 per cent respectively) but a higher proportion of English visitors (82 per cent and 78 per cent respectively).

More than a third of trips to Mid Wales from GB originated from the West Midlands (35 per cent), more than double the proportion for Wales overall (17 per cent). These numbers are to be expected as West Midlands is the closest region in England to Mid Wales and therefore the nearby transport links provide easy access to the area.

Table 2.0 Proportion (%) of Overnight Domestic GB Trips by Region of Origin to All Wales and Mid Wales – Annual Average 2014-2016

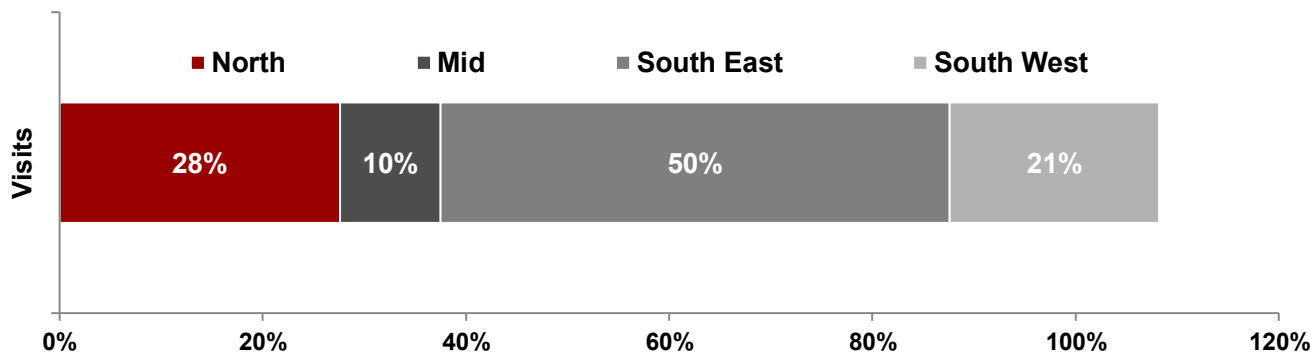
	All Wales	Mid Wales
Total Trips	100%	100%
Scotland	1%	1%
Wales	21%	17%
England	78%	82%
North East England	2%	1%
North West England	19%	11%
Yorkshire and the Humber	5%	2%
East Midlands	5%	4%
West Midlands	17%	35%
East of England	4%	3%
London	6%	5%
South East England	9%	8%
South West England	11%	11%

3. International Visitors

All the data used for this section has been sourced from the [International Passenger Survey](#). Figures shown are the averages taken over a period of three years, 2014-2016, unless stated otherwise.

Over the period of 2014-2016, Mid Wales received an annual average of 98,000 international visitors per year. Over this same period these visitors contributed an average of £45 million per year to the Welsh economy. Mid Wales received just 10 per cent of all international visits to Wales.

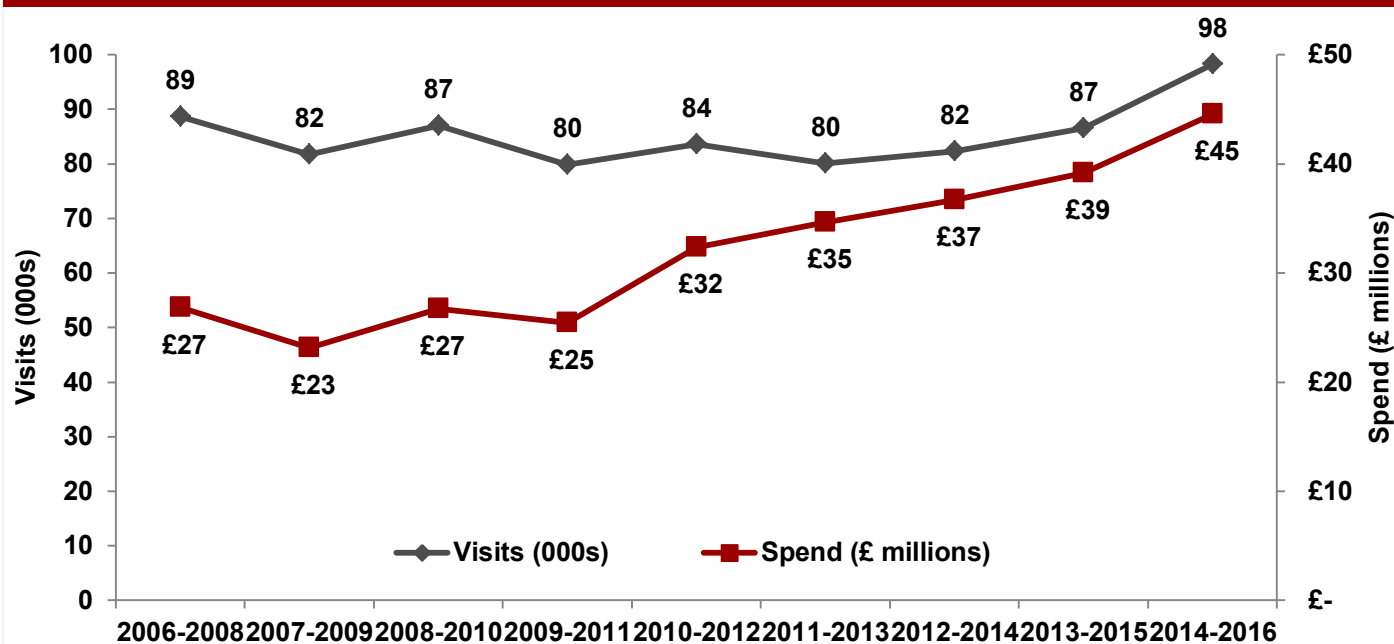
Figure 2.0 Proportion (%) of International Visits to Wales by Welsh Region Annual Average 2014-2016



**Please note that the figures might add up to over 100 per cent due to visitors being able to visit more than one region.*

Volume of Visitors and Related Expenditure

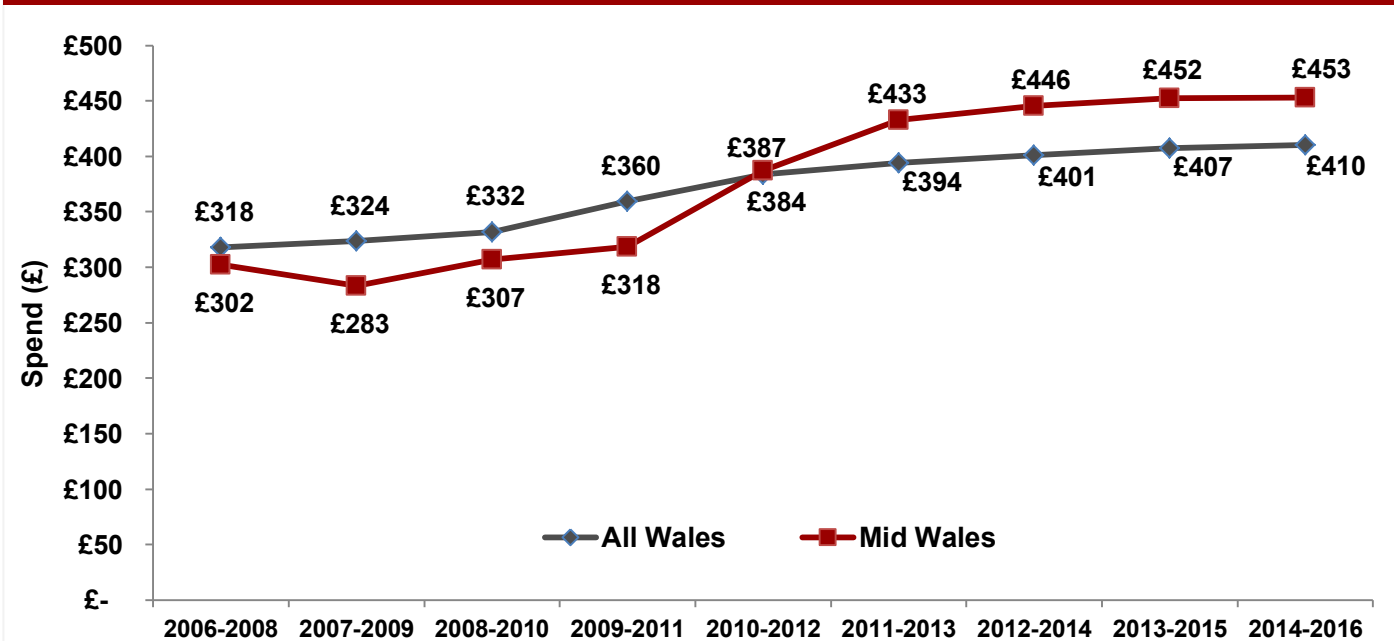
Figure 2.1 Volume of International Visits (thousands) and Related Expenditure (£ millions) to Mid Wales – Three Year Annual Averages



Related expenditure from international visits to Mid Wales has continuously increased since 2009-2011, while volume of visits has risen steadily from 2011-2013 onwards. In 2014-2016, volume of international visits peaked at 98 million whilst related expenditure rose to £45 million.

Average Spend per Visit

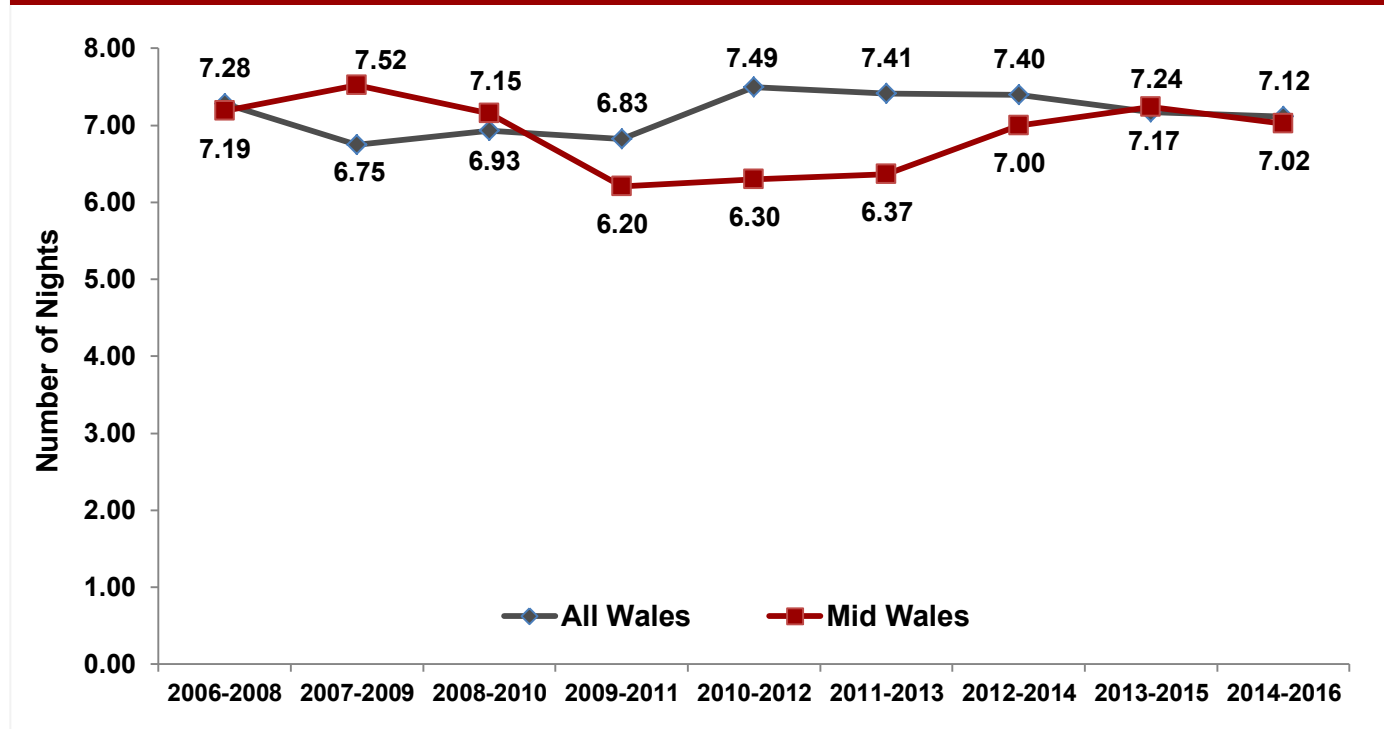
Figure 2.2 Average Spend per International Visit (£) to All Wales and Mid Wales - Three Year Annual Averages



In 2014-2016, Mid Wales compared to all Wales and the other Welsh regions, had the highest average spend per international visit, at £453. For comparison, over the same period, the average for Wales overall was £410.

Average Number of Nights per Visit

Figure 2.3 Average Number of Nights per International Visit to Wales and Mid Wales - Three Year Annual Averages.



Between 2009-2011 and 2012-2014, the average number of nights spend in Mid Wales by international visitors was considerably lower than the overall Wales average. Nonetheless, following on from this period the averages for both Wales and Mid Wales have followed a similar pattern. The average number of nights in 2014-2016 in Mid Wales was 7.02, while for all Wales it was 7.12.

Purpose of Trip

Table 2.1 Volume of International Visits (000s) by Purpose of Trip to All Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Trips	992	98
Holiday	407	55
Business	178	6
Visiting Friends and Relatives	327	32
Other	63	2
Study	17	3

During 2014-2016, over half (56 per cent) of the international visitors to Mid Wales came for a holiday, a higher proportion than the overall Wales average of 41 per cent. In contrast, Mid Wales received only 6 per cent of international business visits, considerably below the Wales average of 18 per cent.

Figure 2.4 Proportion (%) of International Visits to All Wales and Mid Wales by Purpose of Trip – Annual Average 2014-2016

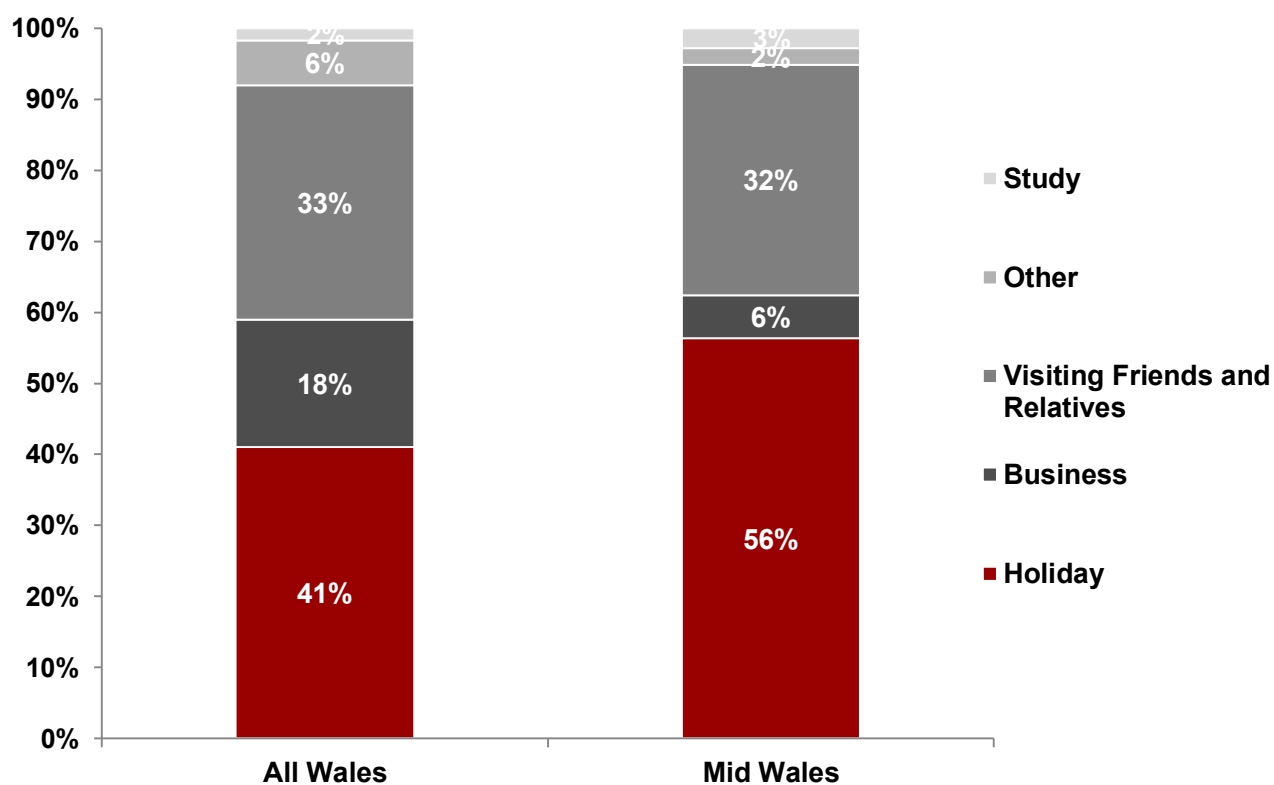
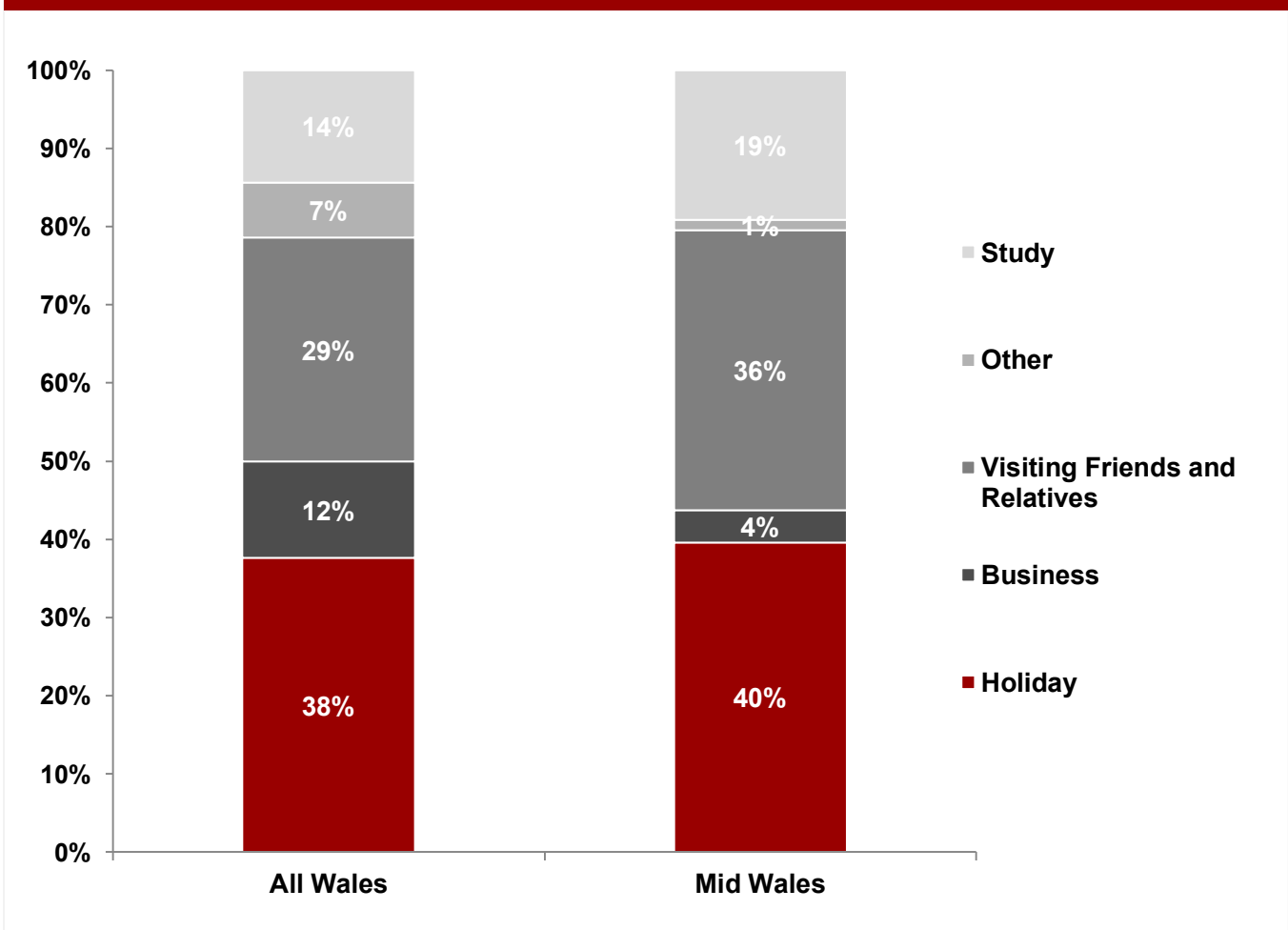


Table 2.2 Related expenditure of International Visits (£ millions) by Purpose of Trip to All Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Expenditure	407	45
Holiday	153	18
Business	50	2
Visiting Friends and Relatives	117	16
Other	29	1
Study	58	9

In 2014-2016, international visitors coming to Mid Wales to study contributed to nearly a fifth (19 per cent, £9 million) of all tourism related expenditure to the region. As seen for all Wales and all four Welsh regions, international visitors are responsible for a larger proportion of related expenditure than volume of international visits. For example in 2014-2016 the proportion of international visitors arriving to study in Mid Wales accounted for only 3 per cent of the total, but contributed to 19 per cent of all related expenditure in Mid Wales.

Figure 2.5 Proportion (%) of Related Expenditure of International Visits to All Wales and Mid Wales by Purpose of Trip – Annual Average 2014-2016



Country of Origin

Please note that tables 2.3 and 2.4 show only the top ten countries of origin of international visitors by volume of visits to Mid Wales and all Wales.

Table 2.3 Top 10 Countries of Origin of International Visits by Volume of Visits (000s) to All Wales and Mid Wales – Annual Average 2014-2016

All Wales		Mid Wales	
All Visits	992	All Visits	98
Ireland	148	Germany	18
France	103	France	11
Germany	94	Netherlands	11
USA	89	Ireland	10
Australia	66	Australia	8
Netherlands	64	USA	5
Spain	55	Belgium	5
Poland	49	Spain	5
Canada	31	Poland	3
Italy	30	Canada	3

The most common country of origin for international visitors to Mid Wales were Germany (18 per cent), followed by France (11 per cent) and the Netherlands (11 per cent).

In comparison to Wales overall, Mid Wales had double the proportion of German visitors (8 per cent and 18 per cent respectively). Furthermore, Belgium (5 per cent) figures in the top ten country of origin list for international visits to Mid Wales but not overall Wales, whereas Italy (3 per cent) is listed in the top ten for all Wales but not Mid Wales.

Table 2.4 Proportion (%) of International Visits by Country of Origin to All Wales and Mid Wales – Annual Average 2014-2016

All Wales		Mid Wales	
All Visits	100%	All Visits	100%
Ireland	15%	Germany	18%
France	10%	France	11%
Germany	9%	Netherlands	11%
USA	9%	Ireland	10%
Australia	7%	Australia	8%
Netherlands	6%	USA	5%
Spain	6%	Belgium	5%
Poland	5%	Spain	5%
Canada	3%	Poland	3%
Italy	3%	Canada	3%

Local Authorities Visited

The most visited local authority in Mid Wales by international visitors in 2014-2016 was Ceredigion with 44,000 visits.

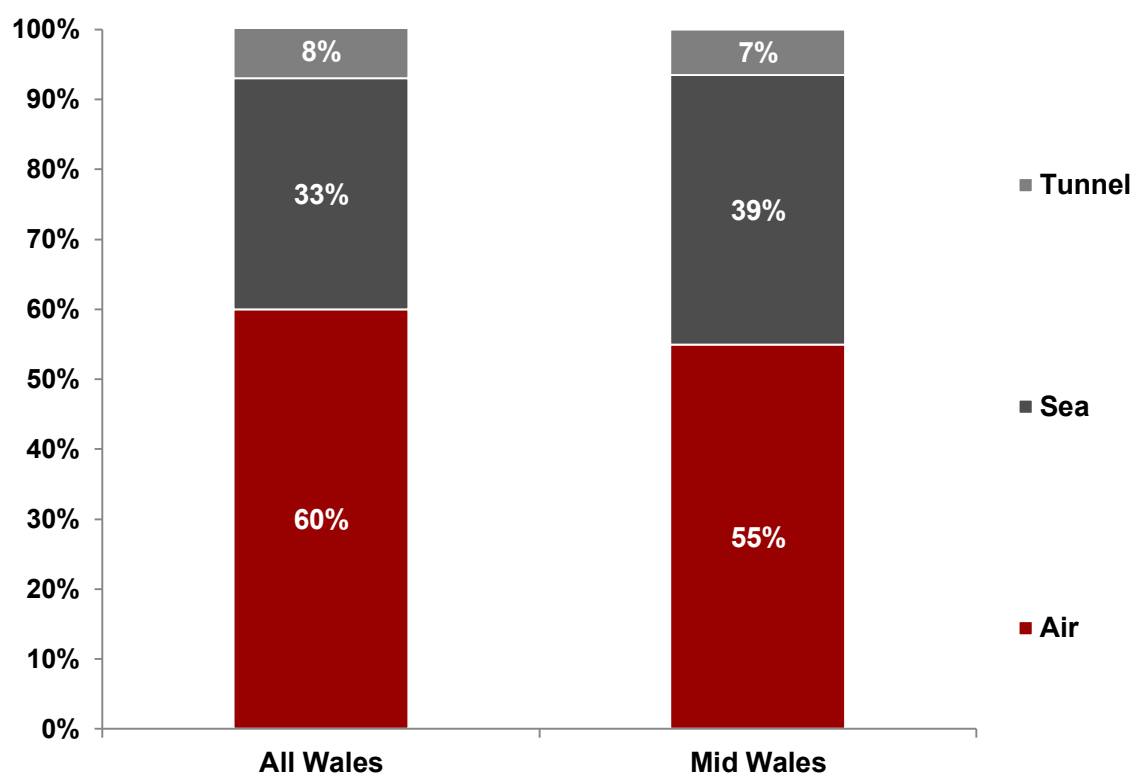
Table 2.5 Volume of International Visits to each Local Authority in Mid Wales – Annual Average 2014-2016

	Visits
Ceredigion	44,000
Powys	39,000

Mode of Transport Used

International visitors are most likely to travel to Mid Wales by air (55 per cent). Compared to Wales overall, Mid Wales had a higher proportion of international visits arriving by sea (39 per cent and 33 per cent respectively) and a smaller proportion of international visits travelling by plane (60 per cent and 55 per cent respectively).

Figure 2.6 Proportion (%) of International Visits to All Wales and Mid Wales by Mode of Transport Used – Annual Average 2014-2016



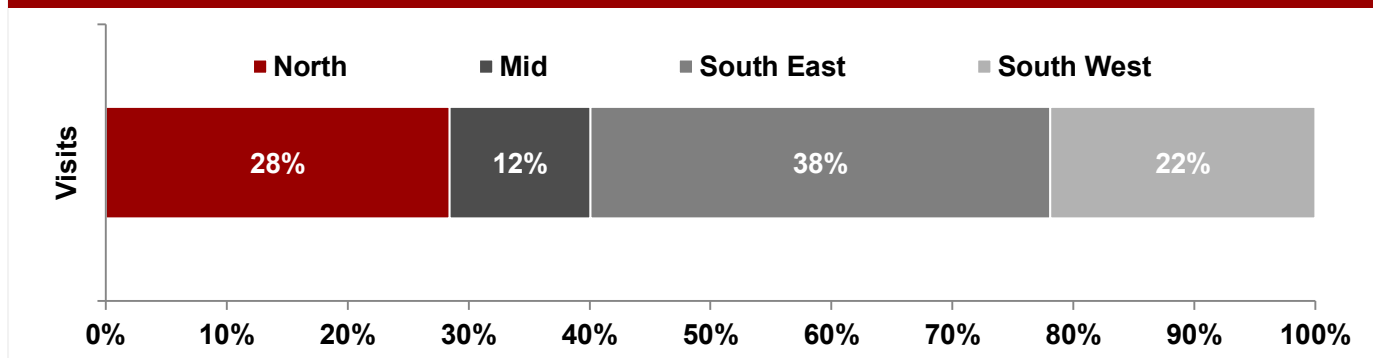
4. Tourism Day Visits

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 shown, unless otherwise stated, are the averages taken over three years: 2014-2016.

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.

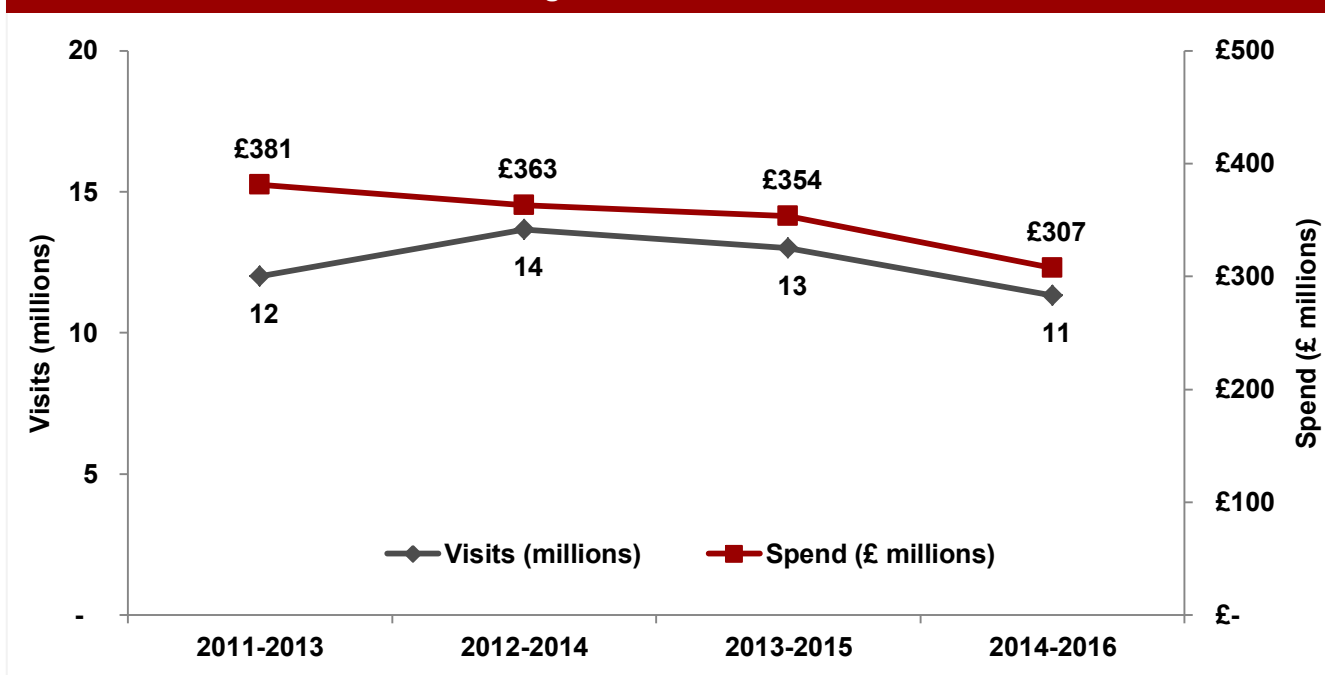
During 2014-2016, Mid Wales received an annual average of 11 million Tourism Day visits with a related expenditure of £307 million. Mid Wales accounted for 12 per cent of all Tourism Day visits to Wales.

Figure 2.7 Proportion (%) of Tourism Day Visits to each Welsh Region – Annual Average 2014-2016



Tourism Day Visits and Related Expenditure

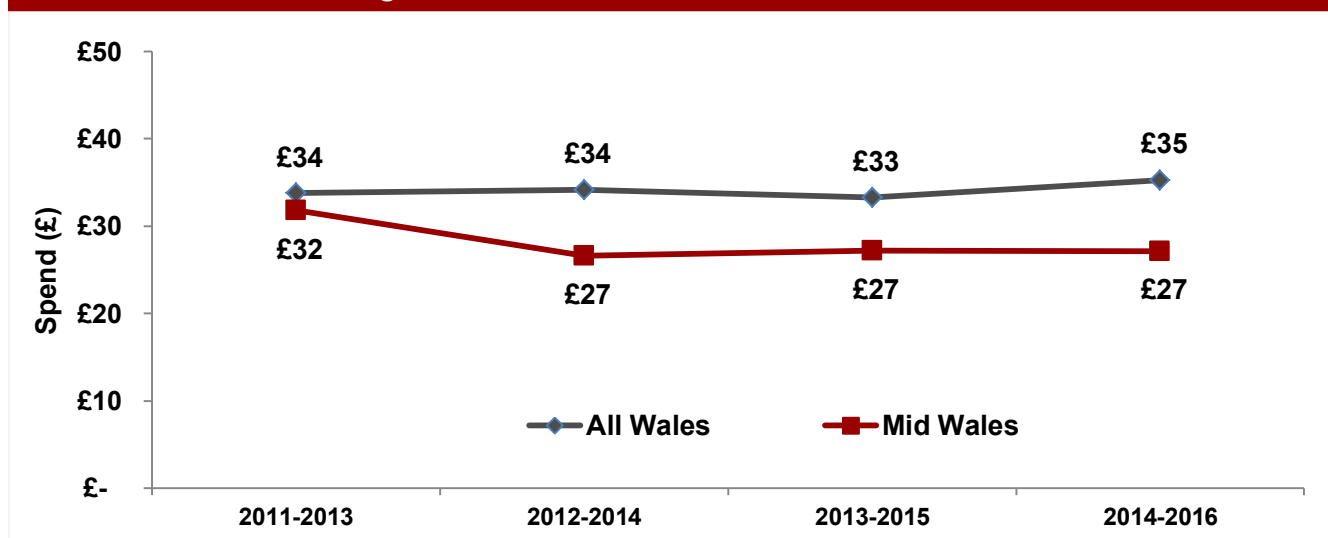
Figure 2.8 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) to Mid Wales - Three Year Annual Averages



From 2012-2014 onwards, the annual average volume of Tourism Day visits in Mid Wales and related expenditure generated has continuously decreased and the figures for 2014-2016 are the lowest recorded for Mid Wales since 2011-2013, with 11 million Tourism Day visits and a related expenditure of £307 million.

Average Spend per Visit

Figure 2.9 Average Spend per Tourism Day Visit (£) to All Wales and Mid Wales - Three Year Annual Averages



Although, as seen in Figure 2.8, the volume and related expenditure of Tourism Day visits have decreased over the years, the average spend per visit between 2012-2014 and 2014-2016 has remained steady at £27.

Activities Undertaken

Table 2.6 Volume of Tourism Day Visits (millions) and Proportion (%) of activities undertaken during a Tourism Day Visit to All Wales and Mid Wales – Annual Average 2014-2016

All Wales			Mid Wales		
All Visits	97.3	100%	All Visits	11.3	100%
Visiting friends or family	19.8	20%	Visiting friends or family	1.8	16%
Going out for a meal	10.5	11%	Going out for a meal	0.9	8%
Outdoor activities	9.1	9%	Outdoor activities	1.4	12%
General day out	7.1	7%	General day out	0.9	8%
Going on a night out	6.9	7%	Going on a night out	0.6	5%
Special shopping	6.2	6%	Special shopping	0.5	4%
Going out for entertainment	4.7	5%	Going out for entertainment	0.6	5%
Watching live sporting events	3.6	4%	Watching live sporting events	0.2	2%
Taking part in sports	3.4	3%	Taking part in sports	2.1	19%
Other day out for leisure	3.3	3%	Other day out for leisure	0.3	3%
Going to visitor attractions	3.3	3%	Going to visitor attractions	0.8	7%
Other leisure/ hobbies	2.9	3%	Other leisure/ hobbies	0.6	5%
Special personal events	2.5	3%	Special personal events	0.3	3%
Special public events	1.9	2%	Special public events	0.3	2%
Day out to health/beauty spa	0.7	1%	Day out to health/beauty spa	0.1	1%

Just under a fifth (19 per cent) of Tourism Day visitors, 2.1 million, took part in sports in 2014-2016, making it the most popular activity undertaken on a Tourism Day visit to Mid Wales. For comparison, the proportion of those taking part in sports during a Tourism Day visit in Wales overall was 3 per cent.

A higher proportion of Tourism Day visitors to all Wales than Mid Wales visited friends or family in 2014-2016 (20 per cent and 16 per cent respectively).

Type of Place Visited

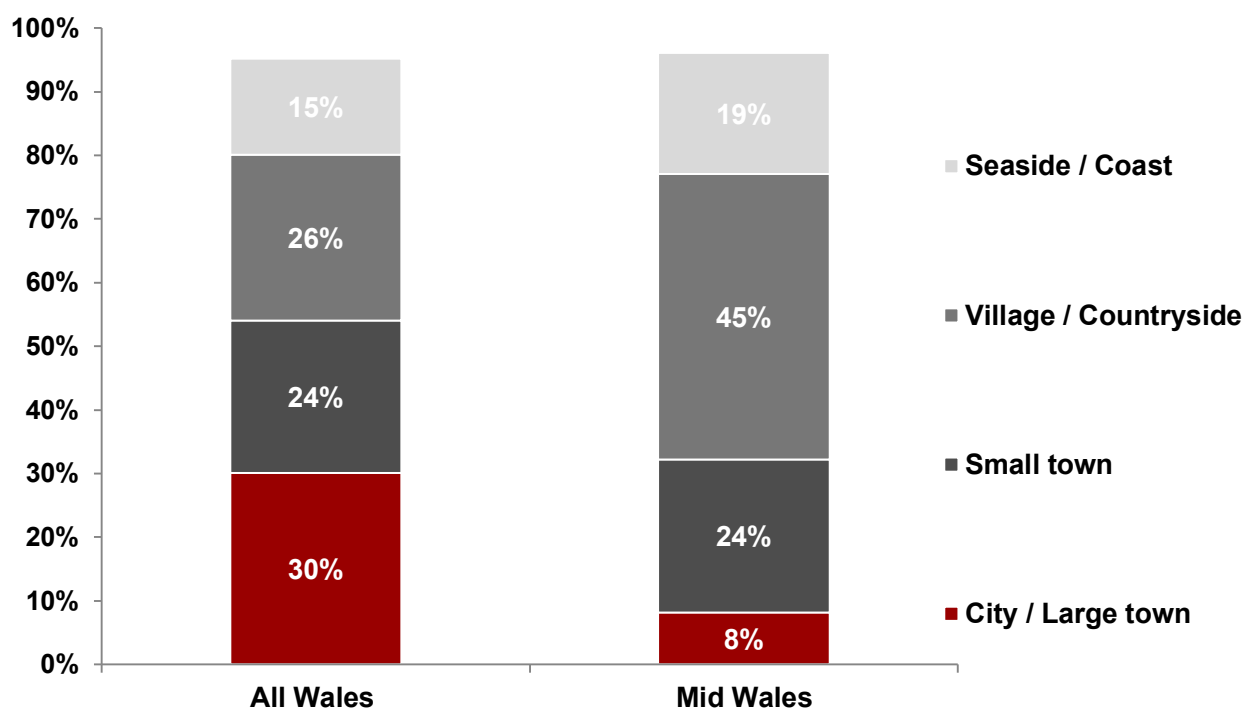
Table 2.7 Volume of Tourism Day Visits (millions) by Type of Place Visited to All Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Visits	97	11
City / Large town	29	1
Small town	23	3
Village / Countryside	25	5
Seaside / Coast	15	2

During 2014-2016, the type of place most visited on a Tourism Day visit in Mid Wales was the village/countryside, with nearly half (45 per cent, 8 million) of visits going to this kind of place, a much higher proportion than the overall Wales average of 24 per cent. On the other hand, over two fifths (43 per cent) of overnight domestic GB visitors to Mid Wales preferred to visit the seaside during their trip (see [Figure 1.8](#)).

Furthermore, Mid Wales had a considerably smaller proportion than Wales overall for Tourism Day visits visiting a city or large town (8 per cent and 30 per cent respectively).

Figure 3.0 Proportion (%) of Tourism Day Visits to All Wales and Mid Wales by Type of Place Visited - Annual Average 2014-2016



**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'.*

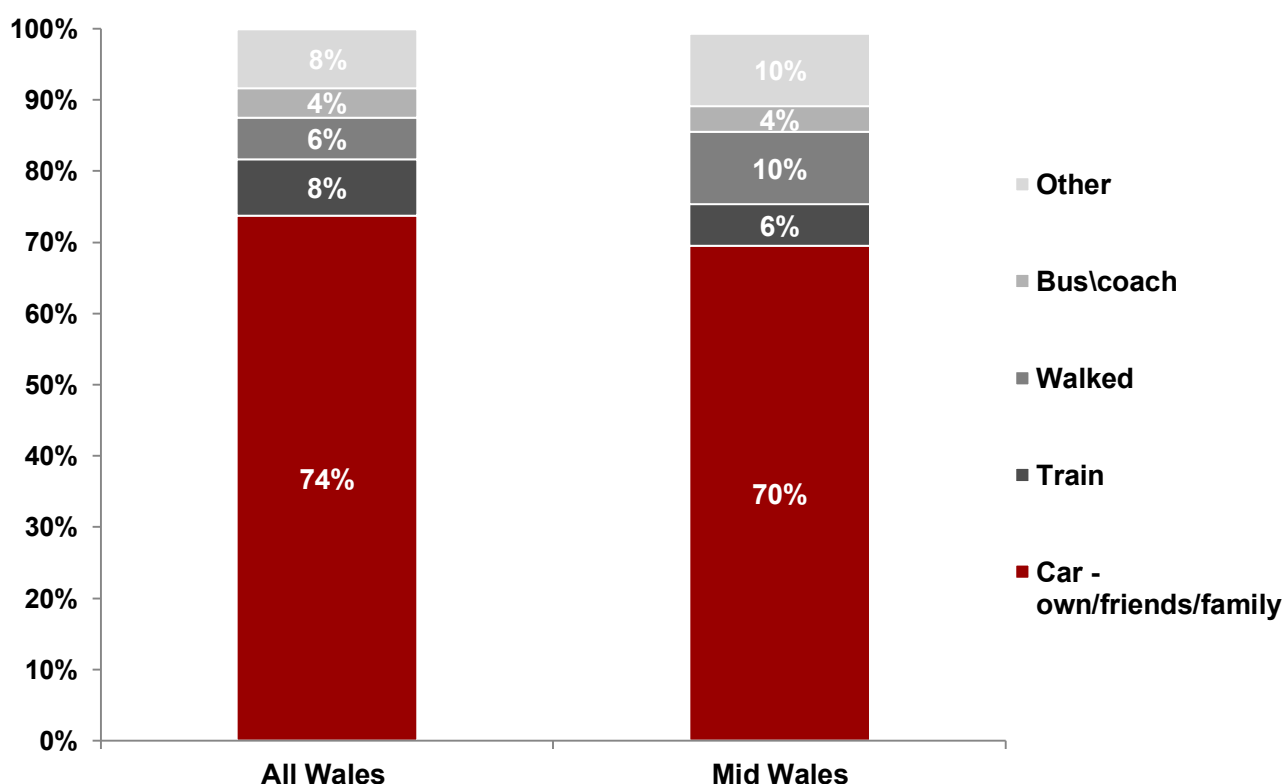
Mode of Transport Used

Table 2.8 Volume of Tourism Day Visits (millions) by Mode of Transport to All Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Visits	97	11
Car - own/friends/family	72	8
Train	8	1
Walked	6	1
Bus\coach	4	0
Other	8	1

Like in all the other regions in Wales, the car is the most preferred mode of transportation in Mid Wales, with the majority (70 per cent) of Tourism Day visitors choosing to travel this way. In Mid Wales, a slightly higher proportion than the overall Wales average, decided to walk during their Tourism Day visit in 2014-2016 (10 per cent and 6 per cent respectively).

Figure 3.1 Proportion (%) of Tourism Day Visits to All Wales and Mid Wales by Mode of Transport Used - Annual Average 2014-2016



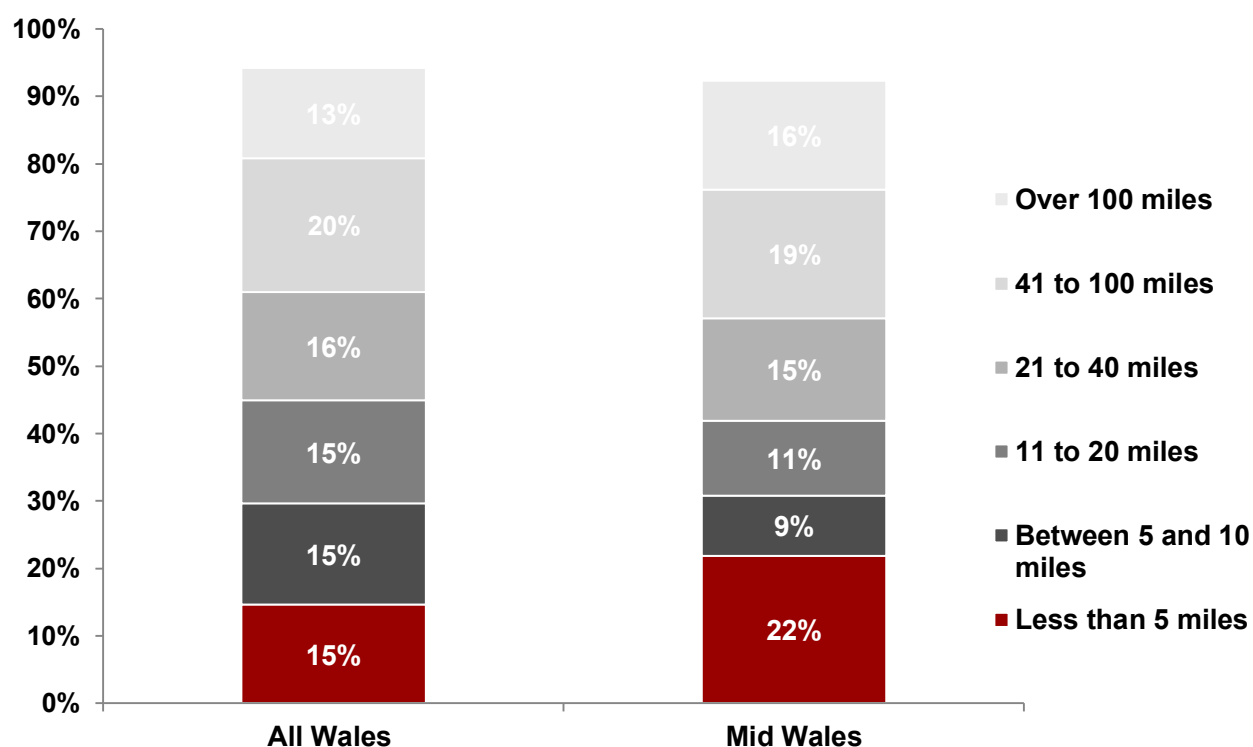
Distance Travelled

Table 2.9 Volume of Tourism Day Visits (millions) by Distance Travelled in All Wales and Mid Wales – Annual Average 2014-2016

	All Wales	Mid Wales
Total Visits	97	11
Less than 5 miles	14	2
Between 5 and 10 miles	15	1
11 to 20 miles	15	1
21 to 40 miles	16	2
41 to 100 miles	19	2
Over 100 miles	13	2

Compared to Wales overall and the rest of the Welsh regions, Mid Wales had the highest proportion of Tourism Day visits travelling less than 5 miles during their visits (15 per cent and 22 per cent respectively) and the lowest proportion of those travelling between five and ten miles (15 per cent and 9 per cent respectively).

Figure 3.2 Proportion (%) of Tourism Day Visits to All Wales and Mid Wales by Distance Travelled - Annual Average 2014-2016



**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'.*

Region of Residence

During 2014-2016, the majority of Tourism Day visits in all four regions originated from the Welsh region in question. For example the majority of Tourism Day visitors to Mid Wales originated from Mid Wales itself (21 per cent).

The second most common region of origin of Tourism Day visitors to Mid Wales in 2014-2016 was South East Wales with an average of 1.61 million (14 per cent) Tourism Day visits residing in this area.

Table 3.0 Volume (millions) and Proportion (%) of Tourism Day Visits to Mid Wales by Region of Residence – Annual Average 2014-2016

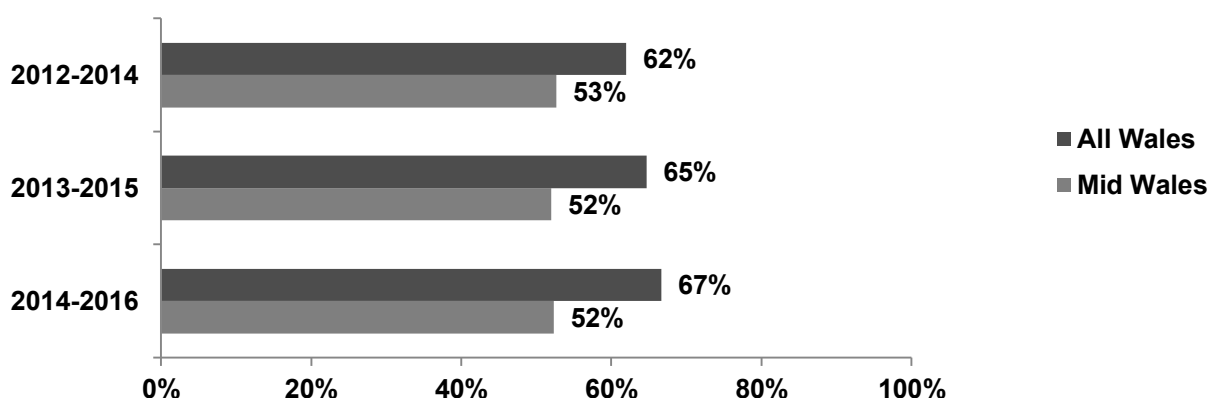
	Mid Wales	
All Visits	11	100%
Mid Wales	2.34	21%
South East Wales	1.61	14%
West Midlands	1.55	14%
South West Wales	1.01	9%
North Wales	0.83	7%
North West England	0.79	7%
East Midlands	0.47	4%
London	0.39	3%
South West England	0.33	3%
Yorkshire and The Humber	0.32	3%
South East England	0.31	3%
North East England	0.27	2%
Scotland	0.15	1%
East of England	0.03	0%

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, 2014-2016, unless stated otherwise.

Hotels

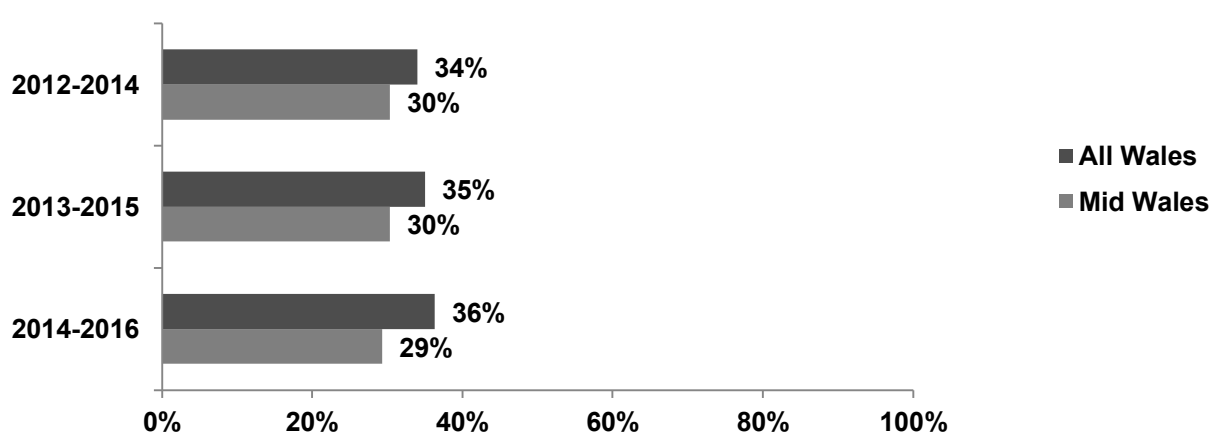
Figure 3.3 Three Year Annual Average Hotel Room Occupancy Rates for All Wales and Mid Wales



Hotel room occupancy rates in Mid Wales have remained nearly unchanged over the years, in addition to being considerably lower than the all Wales average. In 2014-2016, the all Wales average was 67 per cent, while the Mid Wales average was only 52 per cent.

Guesthouses and B&Bs

Figure 3.4 Three Year Annual Average Guesthouse and B&B Room Occupancy Rates for All Wales and Mid Wales

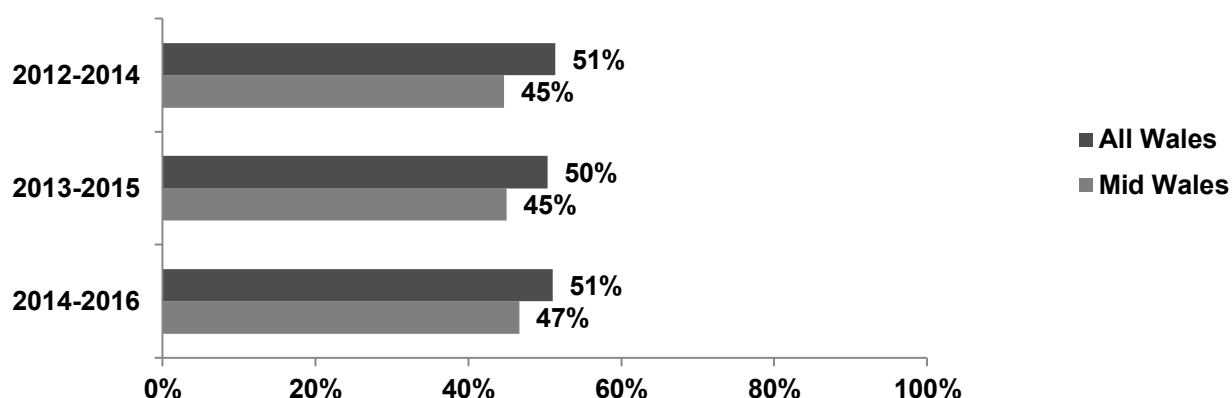


Similar to Hotels, Guesthouse/B&B room occupancy rates have barely fluctuated over the years and have remained below the overall Wales average. The average room occupancy rate for

Guesthouses/B&Bs in 2014-2016 for all Wales was 36 per cent, while in Mid Wales it was 29 per cent.

Self-Catering

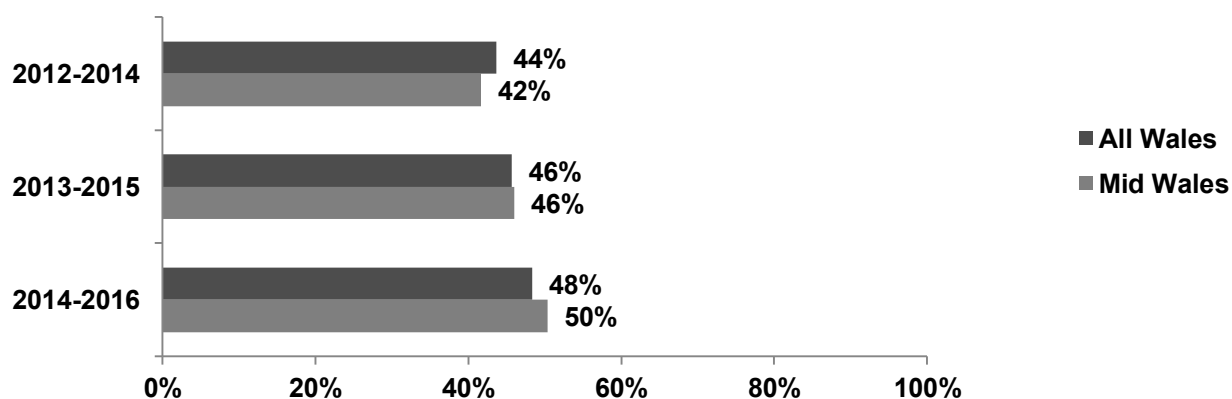
Figure 3.5 Three Year Annual Average Self-Catering Unit Occupancy Rates for All Wales and Mid Wales



The average Self-Catering unit occupancy rates in 2014-2016 for Mid Wales, at 47 per cent, were below the all Wales average of 51 per cent. However the region experienced an increase over the years within the region itself, from 45 per cent in 2012-2014 to 47 per cent in 2014-2016.

Hostels

Figure 3.6 Three Year Annual Average Hostel Bedspace Occupancy Rates for All Wales and Mid Wales



In 2014-2016, the average Hostel bedspace occupancy rates in Mid Wales, at 50 per cent, were higher than the all Wales average of 48 per cent.

6. Bedstock

The data used for this section has been sourced from the [Accommodation Bedstock](#) report. All figures in this section refer to 2013 data only.

Within Wales, 16 per cent of all accommodation establishments and 13 per cent of all bedspaces are located in Mid Wales. The dominant type of accommodation establishment in both Mid Wales (995) and all Wales (7,067) was self-catering, while the majority of bedspaces were Caravan/Camping (50,269 and 399,124 respectively).

Table 3.1 Volume of Establishments by Type of Accommodation in each Welsh Region and All Wales – 2013

	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative*
Total Establishments in Wales	3,205	7,067	1,322	224	50
North Wales	1,260	2,730	671	74	1
Mid Wales	646	995	214	69	28
South East Wales	499	276	74	29	3
South West Wales	800	3,066	363	52	18

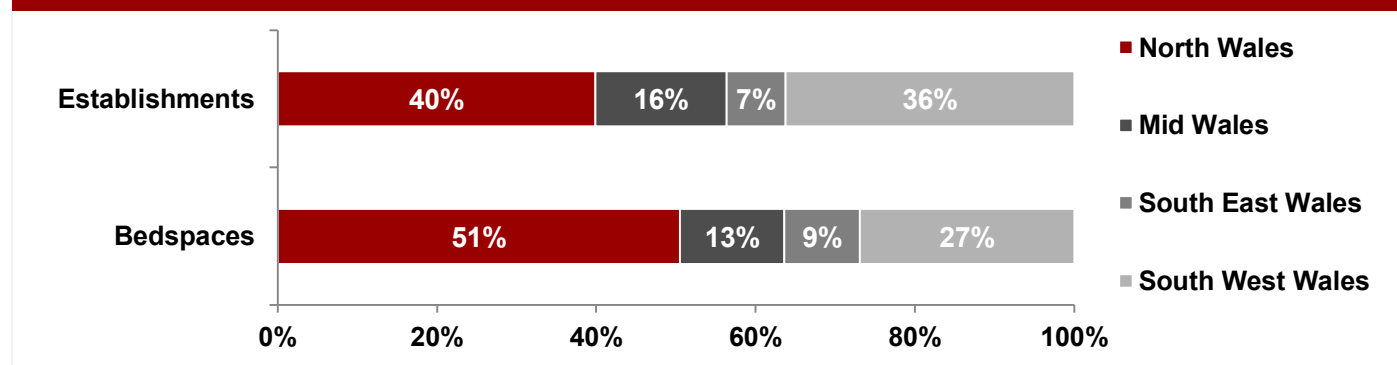
*Includes nomadic structures such as tipis and yurts, as well as Romany caravans.

Table 3.2 Volume of Bedspaces by Type of Accommodation in each Welsh Region and All Wales – 2013

	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative*
Total Bedspaces in Wales	79,086	63,168	399,124	17,300	1,013
North Wales	30,265	24,193	223,368	4,970	2
Mid Wales	8,883	9,681	50,269	3,943	383
South East Wales	24,865	2,903	21,018	4,341	25
South West Wales	15,073	26,391	104,469	4,046	603

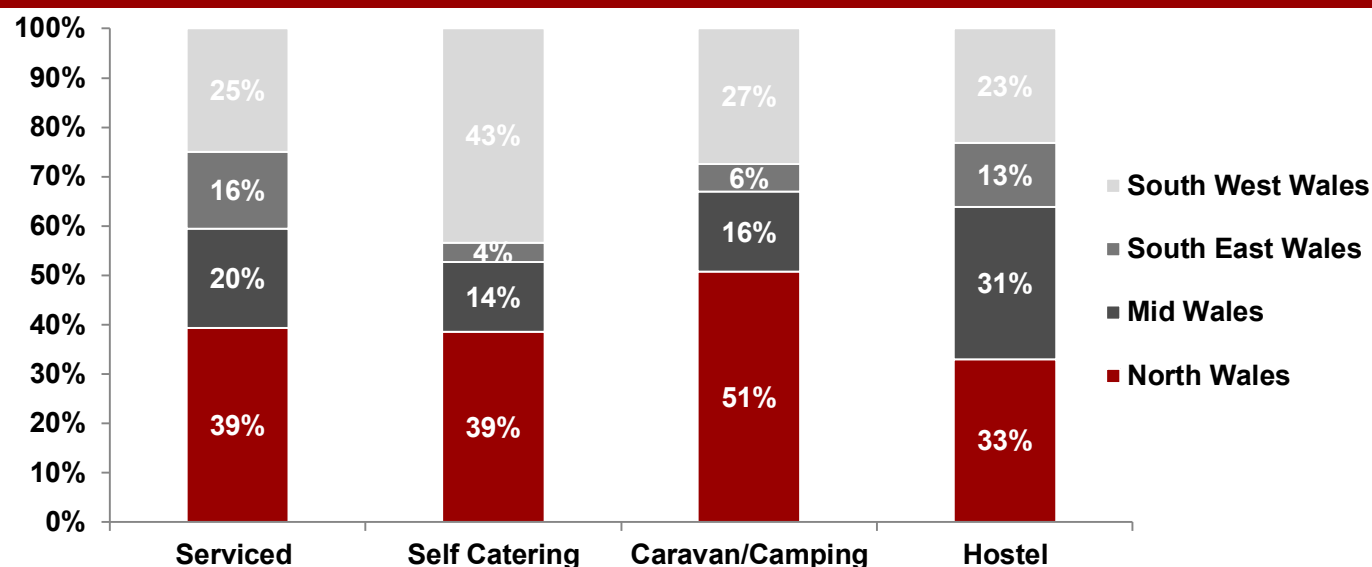
*Includes nomadic structures such as tipis and yurts, as well as Romany caravans.

Figure 3.7 Proportion (%) of Accommodation Bedstock Establishments and Bedspaces in Wales by Welsh Region – 2013



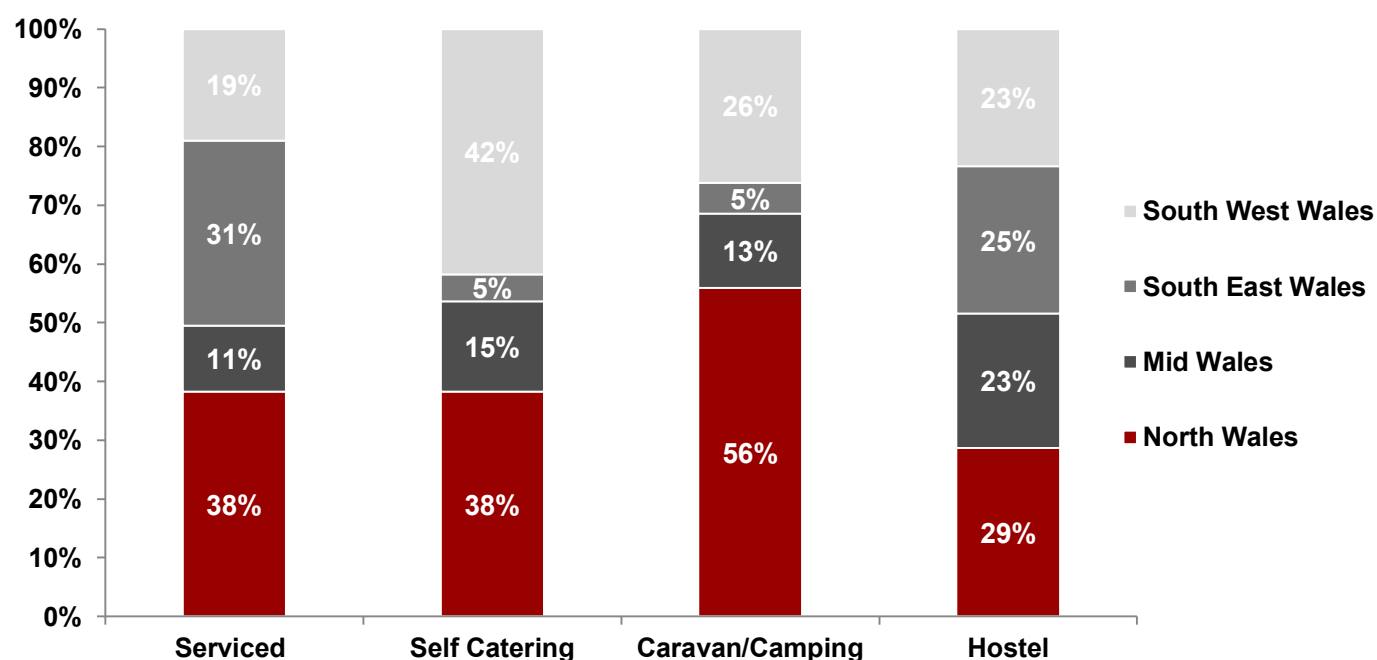
As seen in in Figure 3.8, a fifth (20 per cent) of serviced accommodation, 14 per cent of self-catering, 16 per cent of caravan/camping and nearly a third (31 per cent) of hostel establishments in Wales are found in Mid Wales.

Figure 3.8 Proportion (%) of Accommodation Bedstock Establishments in Wales by Welsh Region - 2013



The proportion of accommodation bedspaces (Figure 3.9) in Mid Wales for Self Catering and Caravan/Camping are similar to those for establishments. For example Mid Wales had 14 per cent of all Self Catering establishments and 15 per cent of Self Catering bedspaces in Wales. In contrast, Mid Wales had a smaller proportion of serviced bedspaces (11 per cent) than serviced establishments (20 per cent). Furthermore, Mid Wales also had a smaller proportion of hostel bedspaces (23 per cent) than hostel establishments (31 per cent).

Figure 3.9 Proportion (%) of Accommodation Bedstock Bedspaces in Wales by Welsh region - 2013

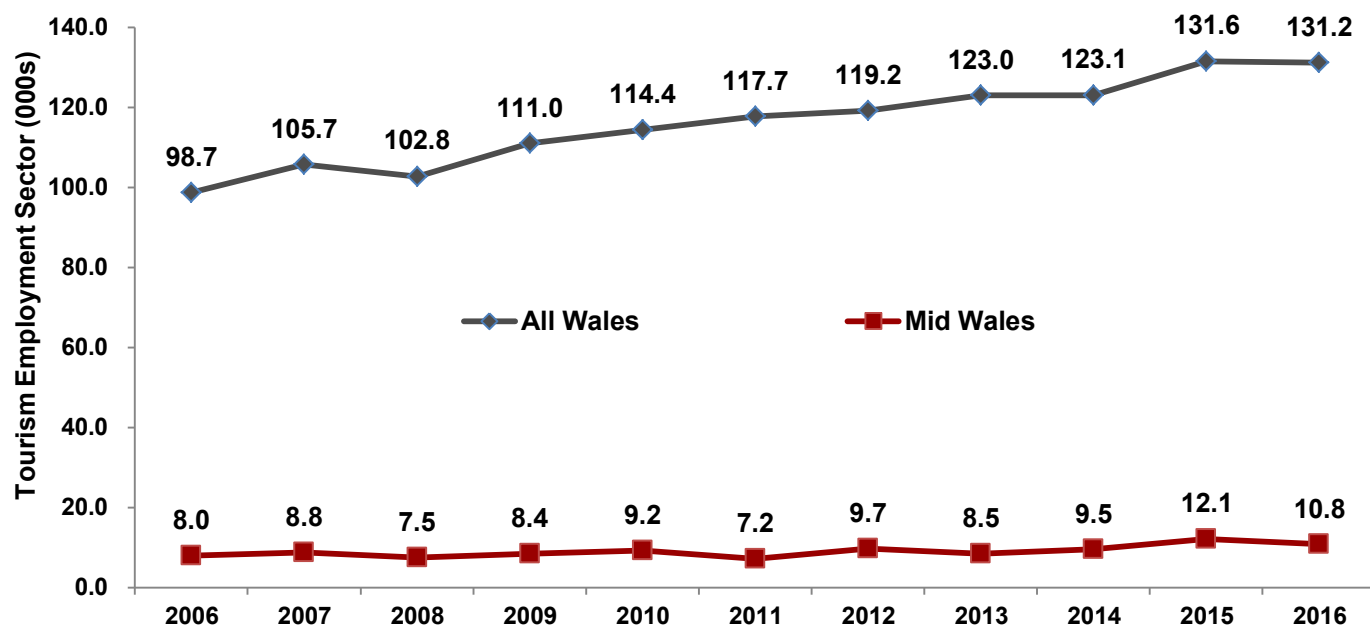


7. Tourism Sector Employment

Data for this section has been sourced from the [Welsh Government Priority Sector Statistics](#).

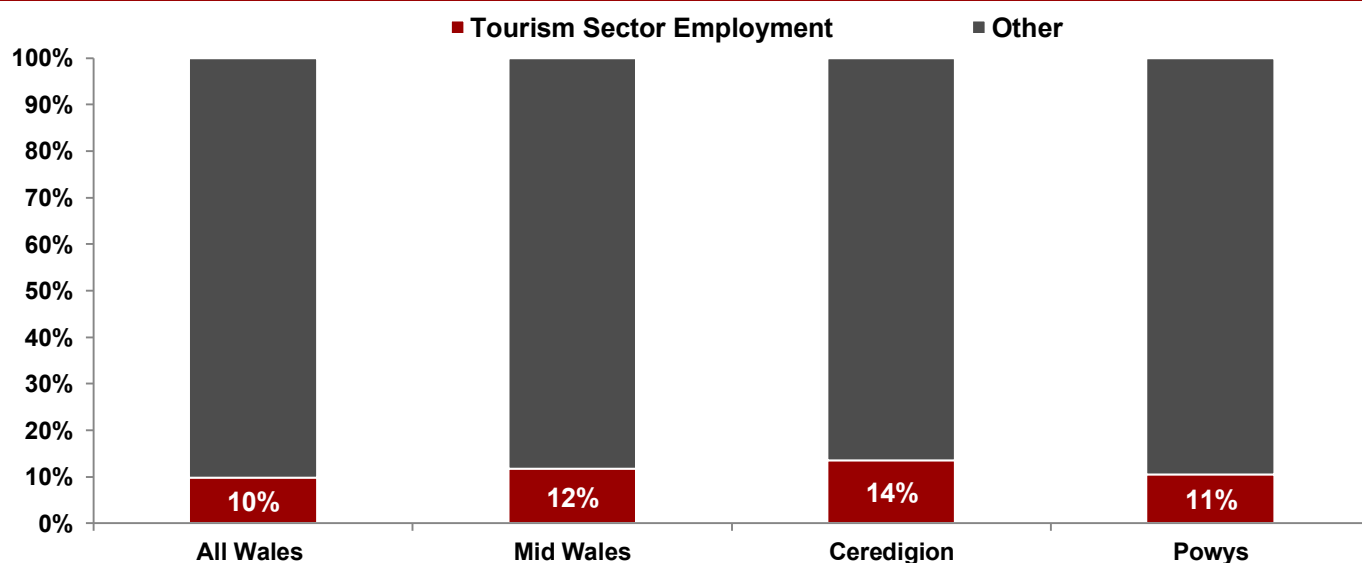
Similar to all Wales, Mid Wales experienced a small decrease in the number of those employed in the Tourism Sector, from 12,100 in 2015 to 10,800 in 2016.

Figure 4.0 Volume Employed (000s) per year in the Tourism Sector in All Wales and Mid Wales



In 2016, the proportion of those employed in the Tourism Sector in Mid Wales (12 per cent) is slightly higher than that of all Wales (10 per cent). The proportion of those employed in the Tourism Sector in Ceredigion is higher again at 14 per cent.

Figure 4.1 Proportion (%) of Tourism Sector Employment compared to all Other Sectors within All Wales, Mid Wales and in each Local Authority in Mid Wales - 2016



8. Appendix

Overnight Domestic GB Visitors

Source: Great Britain Tourism Survey

Table 3.3 Volume of Overnight Domestic GB Trips (000s), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Averages

Trips (000s)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	118,959	118,944	117,563	121,628	122,788	125,186	121,055	120,524	119,374
Wales	8,937	8,718	8,669	9,084	9,322	9,743	9,845	10,127	9,919
North Wales	3,105	3,030	3,184	3,264	3,417	3,488	3,655	3,713	3,626
Mid Wales	1,642	1,591	1,577	1,585	1,540	1,618	1,717	1,763	1,750
South East Wales	2,254	2,124	1,943	2,027	2,110	2,310	2,231	2,473	2,471
South West Wales	1,815	1,882	1,863	2,063	2,074	2,160	2,089	2,081	2,014
Nights (millions)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	378.860	379.046	372.160	378.725	378.989	383.059	370.464	366.751	362.068
Wales	33.238	32.084	32.380	33.429	34.144	34.450	34.496	34.986	34.751
North Wales	12.035	11.822	12.346	12.988	13.415	13.354	13.575	13.199	13.222
Mid Wales	6.463	6.026	6.204	6.131	6.087	6.244	6.535	6.794	6.819
South East Wales	6.202	5.818	5.476	5.241	5.370	5.494	5.291	6.097	6.213
South West Wales	7.676	7.558	7.382	7.983	8.066	8.243	8.166	8.153	7.907
Spend (£ millions)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	20,165	20,458	20,312	21,145	22,146	23,312	23,320	23,603	23,532
Wales	1,473	1,403	1,413	1,523	1,587	1,673	1,673	1,802	1,800
North Wales	492	495	510	545	546	582	591	639	639
Mid Wales	239	228	252	257	255	262	281	309	311
South East Wales	375	328	302	309	349	374	361	418	421
South West Wales	326	308	314	364	390	397	390	386	387

International Visitors

Source: *International Passenger Survey*

Table 3.4 Volume of International Visits (000s), Nights (millions) and Related Expenditure (£ millions) - Three Year Annual Averages									
Visits (000s)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	32,460	31,520	30,527	30,163	30,560	31,523	32,717	34,397	36,037
Wales	1,063	1,014	982	920	874	867	885	924	992
North Wales	298	304	291	273	250	235	232	253	274
Mid Wales	89	82	87	80	84	80	82	87	98
South East Wales	511	473	458	434	429	436	441	467	497
South West Wales	214	202	202	191	175	175	191	191	205
Nights (millions)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB									
Wales	7.737	6.845	6.806	6.279	6.553	6.427	6.547	6.627	7.061
North Wales	1.792	1.572	1.509	1.512	1.652	1.624	1.621	1.572	1.729
Mid Wales	0.637	0.614	0.622	0.496	0.526	0.510	0.576	0.626	0.691
South East Wales	3.631	3.050	3.064	2.834	3.135	3.023	3.002	3.002	3.121
South West Wales	1.570	1.547	1.545	1.368	1.184	1.221	1.298	1.357	1.449
Spend (£ millions)									
	2006-2008	2007-2009	2008-2010	2009-2011	2010-2012	2011-2013	2012-2014	2013-2015	2014-2016
GB	15,980	16,183	16,497	17,050	17,720	19,157	20,440	21,583	22,027
Wales	338	328	326	331	336	342	355	376	407
North Wales	77	83	79	79	79	75	76	82	88
Mid Wales	27	23	27	25	32	35	37	39	45
South East Wales	166	155	155	162	166	168	165	175	178
South West Wales	62	62	62	61	55	62	74	76	90

Tourism Day Visitors

Source: Great Britain Day Visits Survey

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 3.5 Volume of Tourism Day Visits (millions) and Related Expenditure (£ millions) - Three Year Annual Averages				
Visits (millions)				
	2011-2013	2012-2014	2013-2015	2014-2016
GB	1,857	1,872	1,801	1,803
Wales	112	107	97	97
North Wales	29	28	26	28
Mid Wales	12	14	13	11
South East Wales	47	43	38	37
South West Wales	24	23	21	21
Spend (£ millions)				
	2011-2013	2012-2014	2013-2015	2014-2016
GB	62,498	63,161	61,938	62,560
Wales	3,770	3,669	3,240	3,432
North Wales	857	1,051	889	1,052
Mid Wales	381	363	354	307
South East Wales	1,727	1,622	1,379	1,533
South West Wales	729	740	701	694

Accommodation Occupancy Rates

Source: *Wales Tourism Accommodation Occupancy Surveys*

Table 3.6 Accommodation Occupancy Rates in Wales and in each Welsh Region - Three Year Annual Averages							
Hotel - Room Rates				Self Catering - Unit Rates			
	2012-2014	2013-2015	2014-2016		2012-2014	2013-2015	2014-2016
Wales	62%	65%	67%	Wales	51%	50%	51%
North Wales	64%	66%	67%	North Wales	57%	57%	57%
Mid Wales	53%	52%	52%	Mid Wales	45%	45%	47%
South East Wales	66%	70%	72%	South East Wales	53%	51%	48%
South West Wales	55%	59%	63%	South West Wales	46%	47%	50%
Guesthouse/B&B - Room Rates				Hostel - Bedspace Rates			
	2012-2014	2013-2015	2014-2016		2012-2014	2013-2015	2014-2016
Wales	34%	35%	36%	Wales	44%	46%	48%
North Wales	34%	35%	37%	North Wales	50%	52%	54%
Mid Wales	30%	30%	29%	Mid Wales	42%	46%	50%
South East Wales	30%	34%	38%	South East Wales	41%	41%	44%
South West Wales	41%	42%	43%	South West Wales	39%	41%	44%

Bedstock

Source: Accommodation Bedstock Surveys

Table 3.7 Volume of Accommodation Bedstock Establishments and Bedspaces in Wales and in each Welsh Region – 2013					
Establishments					
	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative
Wales	3,205	7,067	1,322	224	50
North Wales	1,260	2,730	671	74	1
Mid Wales	646	995	214	69	28
South East Wales	499	276	74	29	3
South West Wales	800	3,066	363	52	18
Bedspaces					
	Serviced	Self Catering	Caravan/Camping	Hostel	Alternative
Wales	79,086	63,168	399,124	17,300	1,013
North Wales	30,265	24,193	223,368	4,970	2
Mid Wales	8,883	9,681	50,269	3,943	383
South East Wales	24,865	2,903	21,018	4,341	25
South West Wales	15,073	26,391	104,469	4,046	603

Tourism Sector Employment

Source: Welsh Government Priority Sector Statistics

Table 3.8 Volume of Tourism Sector Employment (thousands) in Wales and in each Welsh Region											
Tourism Sector Employment (thousands)											
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Wales	98.7	105.7	102.8	111.0	114.4	117.7	119.2	123.0	123.1	131.6	131.2
North Wales	23.5	24.1	27.3	25.2	30.1	28.5	29.7	30.7	27.5	32.2	31.2
Mid Wales	8.0	8.8	7.5	8.4	9.2	7.2	9.7	8.5	9.5	12.1	10.8
South East Wales	45.8	48.5	45.3	52.7	50.2	57.1	52.6	55.7	59.3	58.4	59.4
South West Wales	21.4	24.1	22.7	24.5	24.7	24.9	27.1	28.2	27.0	29.0	30.1

Great Britain Tourism Survey

Type of Accommodation used on an Overnight Domestic GB Trip

Source: *Great Britain Tourism Survey*

Table 3.9 Accommodation Categories included under NET

2014, 2015	2016
Hotel/Motel (NET)	Hotel/Motel (NET)
Hotel/Motel	Hotel
	Motel
Guest house/Farmhouse/B&B (NET)	Guest house/Farmhouse/B&B (NET)
Paying guest in - Other private house /B&B	Bed & Breakfast
Guest house	Guest house
Paying guest in - farmhouse	Farmhouse
Self catering (NET)	Self catering (NET)
Self-catering in Rented - Flat/Apartment	Self-catering in rented flat\apartment
Self-catering in Rented - House\chalet\villa\bungalow\cottage	Self-catering in rented house\chalet\villa\bungalow\cottage
Holiday camp/Village - Self-catering	Holiday camp\villaage - self catering
Friend's home/Relative's home/Second home/Timeshare	Friend's home/Relative's home/Second home/Timeshare
Friend's /relatives home	Friend's home
Own Second home/timeshare	Relative's home
	Own second home\timeshare
Caravan and Camping (NET)	Caravan and Camping (NET)
Camping	Caravan and Camping
Caravan - Towed	
Caravan - Static owned	
Caravan - Static not owned	

