BLUE SAIL

VISITORS PLACES DESTINATIONS

THE SOUTH EAST WALES STRATEGIC TOURISM FRAMEWORK

BENCHMARKING REPORT
FOR CAPITAL REGION TOURISM

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INTRODUCTION

The South East Wales region was compared to three other areas in the UK:

- Edinburgh and the Lothians
- Bristol (Bath and Avon)
- Newcastle and the North East of England

The four destinations were compared on a range of elements:

- Volume and value of tourism trips
- Visits to attractions
- Accommodation stock
- Conference venues
- Guidebook coverage

Given the different nature of these areas (some are regions, some sub-regions), a key issue in the exercise has been finding comparable data, and this has partly driven the choice of parameters on which to make comparisons. In general, the benchmarking analysis is based on similar and comparable data sources.

A further issue in making comparisons is that the four areas do differ in terms of their relative size (e.g. the population of the North East is nearly twice that of SE Wales) - where possible comparisons have been made on the basis of ratios of population to eliminate this issue.

VOLUME AND VALUE OF TOURISM TRIPS

The following table summarises the overall volume and value of staying trips to the four areas. It is based on UKTS and IPS data for 2005 - the exception is Avon which is based on data from the Cambridge Model (which in turn is based on UKTS and IPS data). All figures are in millions.

VOLUME AND VALUE OF STAYING TOURISM				
	SE WALES	NE ENGLAND	EDINBURGH AND LOTHIANS	AVON
Domestic				
Trips	2.8	4.64	2.78	2.23
Nights	8.5	13.5	7.05	6.08
Spend (£)	439	875	706	306
Overseas				
Trips	0.471	0.59	1.2	0.67
Nights	3.4	5.1	7.6	4.54
Spend (£)	152	206	420	219
Total				
Trips	3.271	5.23	3.98	2.899
Nights	11.9	18.6	14.65	10.62
Spend (£)	591	1081	1126	525

The following table summarises the relative importance of different markets – by domestic and overseas, and purpose. Figures relate to the percent of overall trips in each area.

MARKET GROUPS – RELATIVE IMPORTANCE				
	SE WALES	NE ENGLAND	EDINBURGH AND LOTHIANS	AVON
Domestic	86	89	70	77
Overseas	14	11	30	23
Holiday	49	50	58	46
Business	21	24	20	23
VFR	31	26	19	28

Figures exclude “other” trips and may exceed 100% due to rounding

The next table shows a number of trip ratios and averages. The trip ratios are based on number of trips per head of population - this provides a (crude) comparison between the different areas.

RATIOS AND AVERAGES				
	SE WALES	**NE ENGLAND**	**EDINBURGH AND LOTHIANS**	**AVON**
No. of trips (per head population)				
Total trips	2.35	2.08	5.02	2.95
Holiday	1.15	1.03	2.94	1.36
Business	0.50	0.49	0.98	0.67
VFR	0.72	0.54	0.94	0.83
Tourism spend per head of population (£)				
Total trips	424.07	429.75	1420.64	533.61
Holiday	215.98	205.13		236.82
Business	112.51	134.77		141.99
VFR	76.49	68.38		101.44
Spend per trip	180.68	206.69	282.91	181.10
Spend per night	49.66	58.12	76.86	49.44

A number of key points can be made in relation to these three tables:

- In absolute terms, the visitor economy of South East Wales is broadly on a par with Avon, but considerably smaller that NE England and Edinburgh and the Lothians
- SE Wales (along with the NE) has a higher proportion of domestic trips (86% in the case of SE Wales) than Edinburgh and Avon
- The proportion of VFR trips is higher than in the other areas (31%). The proportions of business and holiday trips are on a par with other regions (the exception being Edinburgh with a higher ratio of holiday trips)
- Spend per trip and night are relatively low in SE Wales – on a par with Avon but about 86% of spend in the NE and 64% of spend in Edinburgh and the Lothians
- In relative terms (i.e. per head of population), SE Wales is generating a middle number of trips – it is slightly higher than the NE, slightly lower than Avon, and considerably lower than Edinburgh (which is in a different league). This pattern is reflected for holiday and VFR trips and broadly for business trips, although here SE Wales ranks on a par with the NE
- At £424, tourism spend per head of population in SE Wales is on a par with the NE but lower than Avon and Edinburgh

EMPLOYMENT

The following summarises the number of direct Full Time Job (FTEs) equivalents supported by tourism, and the proportion of the population employed in tourism. It should be noted that these figures come from different sources - for SE Wales, Avon and the NE from economic impact models (like STEAM and Cambridge). The Edinburgh data is drawn from the Annual Business Inquiry.

EMPLOYMENT				
	SE WALES	NE ENGLAND	EDINBURGH AND LOTHIANS	AVON
No. of direct FTEs supported by tourism	19440	30000	38730	19788
% of population employed in tourism	1.4	1.2	4.9	2.0

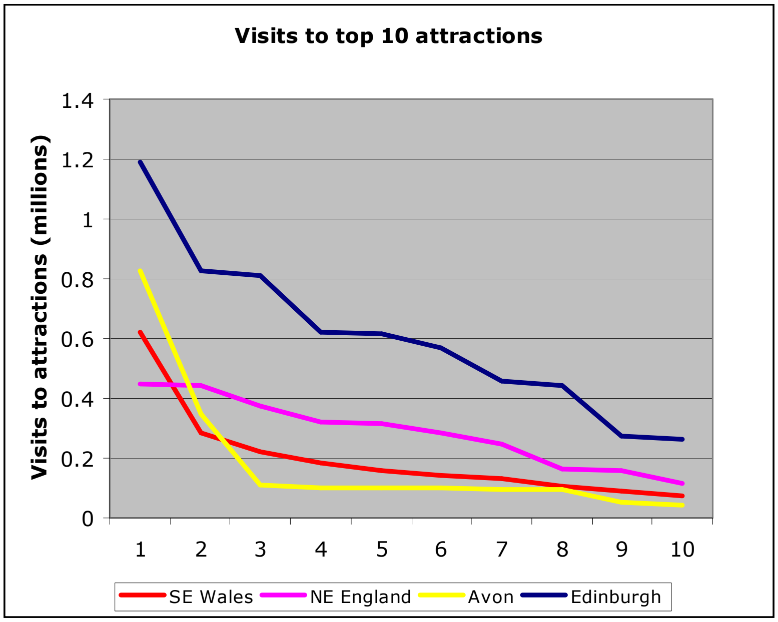
- SE Wales in absolute terms has the lowest level of tourism related employment (reflecting the scale of its visitor economy)

- In relative terms the importance of tourism (in employment terms) is on a par with the NE but lower than Avon and Edinburgh

VISITS TO ATTRACTIONS

The following chart shows visits to the top ten attractions in each area. A couple of points should be noted in relation to this analysis:

- It excludes country parks and retail outlets (which often have estimated data and a local audience)
- The inclusion of attractions is based on data availability - some significant attractions may therefore not be featured (see appendix for attractions that are included)



With the exception of NE England, the areas typically have a couple of primary attractions that are considerably larger than the rest.

The areas have different patterns of attraction provision:

- Edinburgh, reflecting the importance of its holiday markets, has three large primary attractions (exceeding 800k visits) but also a significant depth beyond that – the tenth attraction is attracting over 250k
- The NE has a relatively "flat" profile –its largest attraction is under half a million but most of its top ten exceed 250k visitors. This is probably a function of the fact that it is a region (with a larger population than the other areas)
- Avon and SE Wales have similar profiles. These are dominated by a one significant attraction (c620k for SE Wales), a couple of medium sized attractions (c220k to 280k for SE Wales) and then a tail of more moderate sized attractions
- The relative lack of depth of attractions in SE Wales and Avon is illustrated by the fact that Edinburgh's 10th biggest attraction is only smaller than the top two in these areas

The visits to attractions are shown below.

SE WALES	
St. Fagan's; National History Museum Cardiff	622,472
National Museum Cardiff	285,725
Cardiff Castle	222,711
Techniquest, Cardiff	183,301
Big Pit - National Mining Museum, Blaenavon	156,977
Wales Millennium Centre, artsExplorer Gallery, Cardiff	144,247
Goleulong 2000 Lightship, Cardiff	131,456
Old Station, nr. Chepstow	105,000
Caerphilly Castle	87,812
Castel Coch, Cardiff	75,836
NE ENGLAND	
Baltic Centre for Contempory Arts	445,931
Discovery Museum Newcastle	440,968
Alnwick Garden	375,000
Sunderland Museum and Winter Gardens	320,628
Beamish	317,860
Laing Art Gallery	286,728
St. Aidan's Winery	250,000
Cragside House and Gardens	163,500
Shildon Railway Village	160,500
Bamburgh Castle	118,041
EDINBURGH AND LOTHIANS	
Edinburgh Castle	1,187,342
Royal Museum and Museum of Scotland	828,367
National Gallery of Scotland	810,054
Royal Botanic Gardens	619,946
Edinburgh Zoo	614,321
National War Museum of Scotland	567,744
Edinburgh Bus Tours	458,963
Scottish Parliament Visitor Centre	442,865
Our Dynamic Earth	273,279
Royal Yacht Britannia	265,659
AVON	
Roman Baths	824,197
Bath Abbey	350,000
Sally Lunn's House, Bath	111,402
Avon Valley Railway	100,000
Bristol Cathedral	100,000
Museum of costume, Bath	98,230
Victoria Art Gallery	95,400
Noah's Ark Zoo Centre	94,516
Tyntesfield	51,424
Jane Austin Centre	41,546

ACCOMMODATION STOCK

The following table summarises the relative bedstock for each area. The bedspace data is generally an estimate (particularly for self catering) since the different areas have used different methods of recording this (some use bedspaces, others rooms, pitches or units or a combination).

ACCOMMODATION STOCK	SE WALES	NE ENGLAND	EDINBURGH AND LOTHIANS	AVON
Serviced				
No. of establishments	564	930	714	N/a
No of bedspaces	20080	34679	24776	18830
Self catering				
No. of establishments	228	1135	885	317
No. of bedspaces	22008	27998	29718	5811
Total				
No. of establishments	792	2065	1599	
No. of bedspaces	42088	62677	54494	24641
% of bedspaces that are serviced	48%	55%	45%	76%
Bedspaces per thousand population	30	25	69	25
Hotel room occupancy	61	59	75	N/a

- In absolute terms, SE Wales has less bedspaces than the NE and Edinburgh
- The majority of bedspaces (52%) are self catering
- In relative terms, SE Wales has more bed spaces per head of population than the NE and Avon, but considerably less than Edinburgh (less than half)
- Hotel occupancy in SE Wales is on a par with the NE regional occupancy levels

CONFERENCE SUPPLY

The following table summarises elements of conference supply.

SUPPLY OF CONFERENCE VENUES				
	SE WALES	NE ENGLAND	EDINBURGH AND LOTHIANS	AVON
No. of venues*	144	233	139	146
No. of venues per 100k population	10.3	9.3	17.5	14.8
No. of venues per 100k staying business visitors	4.8	5.4	5.7	4.6

* Source: Venue Finder web site

- SE Wales's supply is broadly on a par with comparators, although the North of England has significantly more venues

GUIDE BOOKS

Coverage in three guide books (the Rough Guide to Britain, the Lonely Planet Guide to Great Britain and the DK Eyewitness Travel Guide to Great Britain) was reviewed in quantitative terms.

The results are summarised below:

GUIDE COVERAGE				
	SE WALES	NE ENGLAND	EDINBURGH AND LOTHIANS	AVON
Pages of coverage				
Rough Guide to Britain	21	47	59	24
Great Britain (Eyewitness Travel Guide - DK)	6	16	8.5	6.3
Lonely Planet	18.5	27	26	19
Total	45.5	90	93.5	49.3
Ratio - Pages per million trips	14	17	23	17
Ratio - Pages per million population	33	36	118	50

- In absolute and relative terms SE Wales is receiving less coverage than its comparators - possibly a reflection of the relatively low proportion of overseas trips (guidebooks of this type are often written for a non-UK audience)

- The majority of coverage of SE Wales (63%) is focused on Cardiff. In the three guidebooks the area is included in a broader "South Wales" section - typically Cardiff is a major sub-section of this

Coverage is however positive – for example, in the Rough Guide:

- On Newport - "*hardly the most pre-possessing of towns....The place does have a tremendous energy and is well worth a night's stop*"
- The Valley's – *"not traditional tourist country but it's one of the most interesting and distinctive corners of Wales"*
- Cardiff - *"an essential stop"*

Similarly in the Lonely Planet:

- Cardiff - *"Contemporary Cardiff is the epitome of cool, pulsing with a creative energy and relaxed atmosphere that complements its youthful vigour*"
- Wye Valley - *"typifies the British Countryside"*
-
- The Valleys - *"these are places to discover Wales' most important recent history"*

SUMMARY AND CONCLUSIONS

In overall terms, SE Wales is generally on a par with its comparators, albeit Edinburgh & Lothians is in a different league in terms of supply and performance.

There are however, some interesting points of difference for SE Wales:

- The relatively high proportion of VFR
- The relative importance of domestic markets
- The relatively low spend per trip and night further confirmed by a relatively low spend per head of population
- The relatively low (in comparison to Avon and Edinburgh) levels of tourism dependent employment
- A lack of depth of major attractions – particularly in comparison to Edinburgh
- A lower level of absolute and relative coverage in Guide Books but with largely positive reviews