

Carmarthen Town Accommodation Assessment

Tourism Development

December 2021

carmarthenshire.gov.wales

Cyngor **Sir Gâr**
Carmarthenshire
County Council



Current Supply

This study covers all types of serviced accommodation including hotels, 'Limited Service' hotels, and several Bed and Breakfasts amounting to 164 Properties offering 1,274 Bedrooms

To put this into context with non-serviced portfolio, there are over 500 self-catering and 120 caravan / holiday parks offering over 22,000 bedspaces. It is the former sector that has shown growth in the last 10 years whilst the latter has had steady growth for over 15 years with much of the offering at least 3 stars if not 4

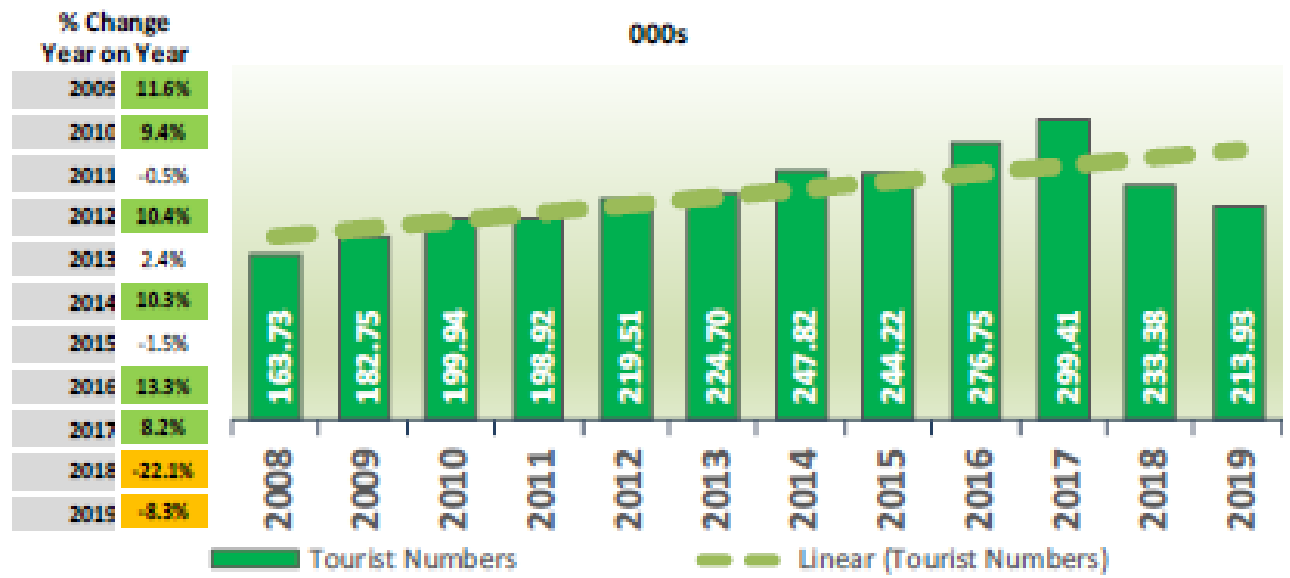
Across the County, the serviced portfolio is:

- 23 Hotels offering 632 rooms and 1,514 bed spaces
- 11 Inns offering 124 rooms and 255 bed spaces
- 125 B&B's offering 495 rooms and 1,092 bed spaces
- 5 guest houses offering 33 rooms and 74 bed spaces

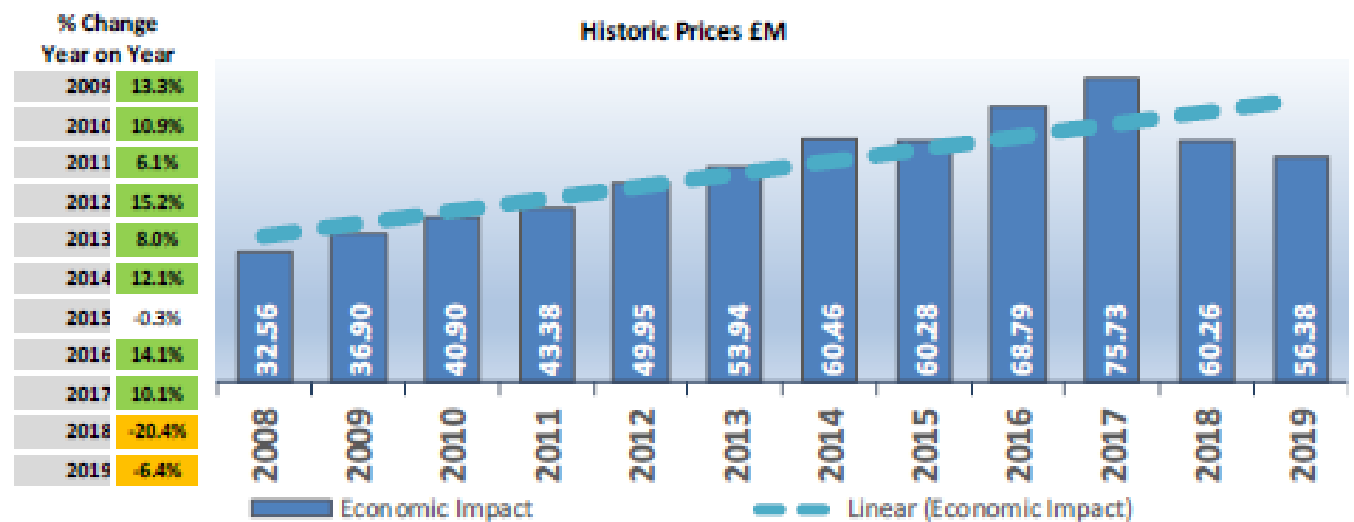
Carmarthen Town has six full-service hotel and no limited-service hotels. There are limited-service hotels situated on the primary east / west route through the county – one at Cross Hands and one at St Clears. Llanelli, however, has seen considerable investment in this sector with four facilities being built with 159 rooms. Much of the accommodation portfolio is located outside the principal towns reflecting the 'rural' nature of the county.

Establishment Name	Total Rooms	Total Bedspaces
Boars Head Hotel	16	31
Drovers Arms Hotel	11	22
Falcon Hotel	17	29
Ivy Bush Royal Hotel	70	144
New Park Hotel	10	18
Spilman Hotel	14	28

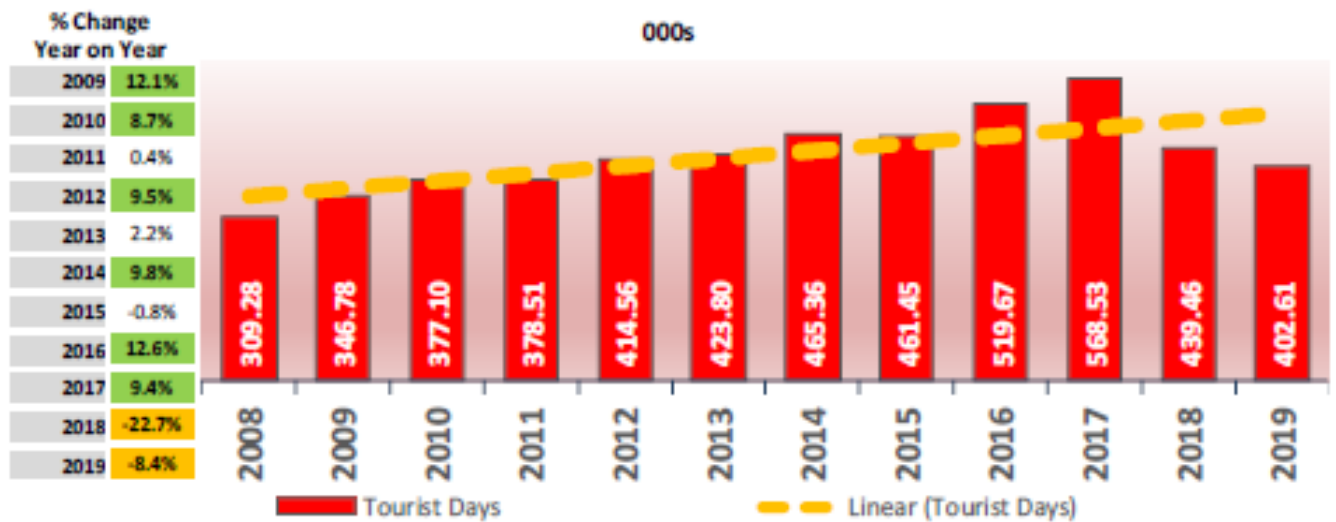
Visitor Numbers: Serviced Accommodation



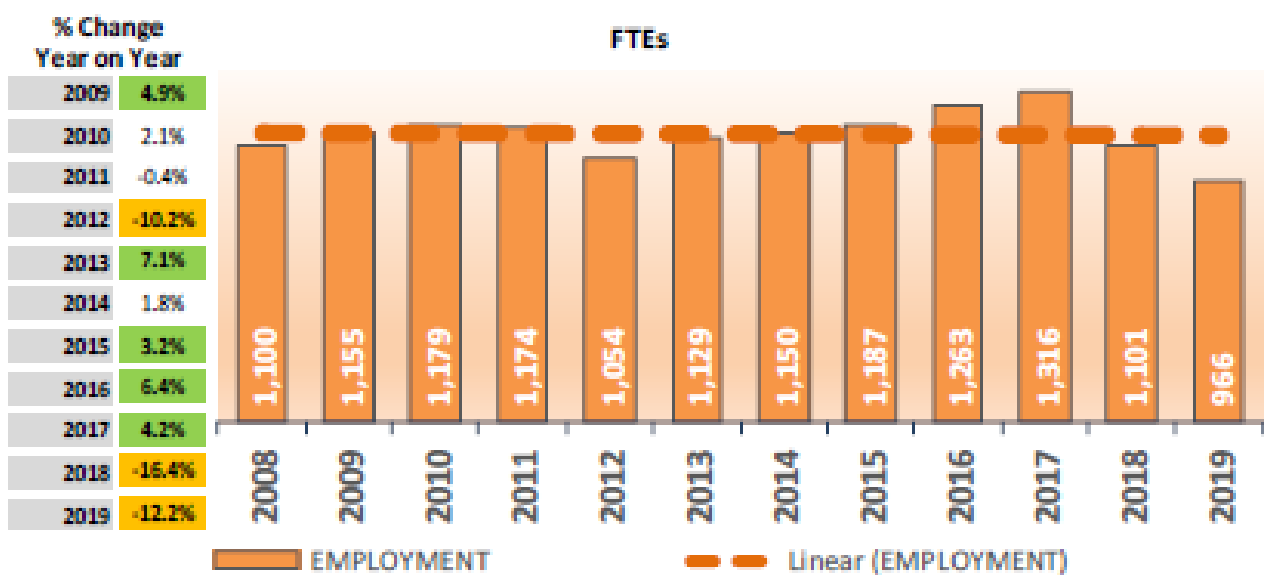
Economic Impact: Historic Prices Serviced Accommodation



Visitor Days: Serviced Accommodation



Direct Employment: Serviced Accommodation



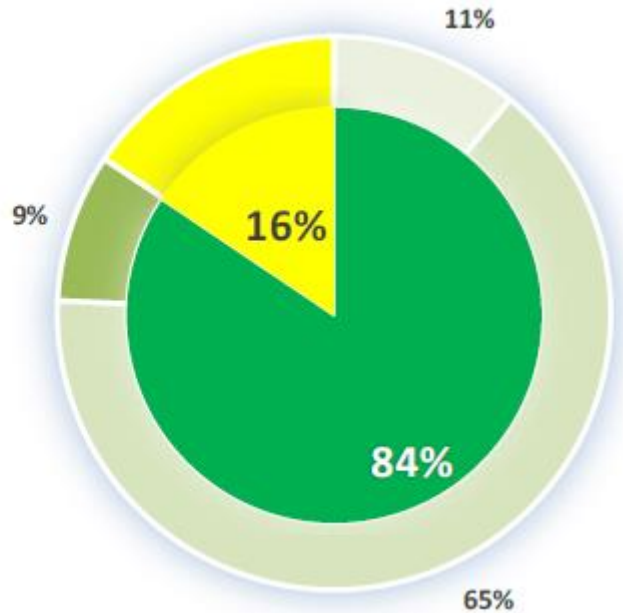
% Change from 2008	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Historic Prices		13.3%	25.6%	33.2%	53.4%	65.6%	85.7%	85.1%	111.3%	132.6%	85.1%	73.1%
Visitor Numbers		11.6%	22.1%	21.5%	34.1%	37.2%	51.4%	49.2%	69.0%	82.9%	42.5%	30.7%
Visitor Days		12.1%	21.9%	22.4%	34.0%	37.0%	50.5%	49.2%	68.0%	83.8%	42.1%	30.2%
Direct Employment		4.9%	7.2%	6.7%	-4.2%	2.6%	4.5%	7.9%	14.8%	19.6%	0.0%	-12.2%

Economic Impact: Share of Total

Carmarthenshire has one of the highest spend per overnight visitor in Wales

TOTAL
£513.25m

	£M
Serviced	56.38
Non-Serviced	332.29
SFR	44.63
Staying Visitor	433.29
Day Visitor	79.96
Total	513.25



Visitor Numbers: Share of Total

TOTAL
3.44m

	M
Serviced	0.21
Non-Serviced	0.62
SFR	0.29
Staying Visitor	1.12
Day Visitor	2.31
Total	3.44

