

Wales Accommodation Occupancy Survey 2013 - Summary

Occupancy surveys of both the Serviced and Self-catering accommodation sectors have run since 1972 and 1987 respectively.

The surveys provide comprehensive trend information on the demand for accommodation in Wales across the following accommodation types: hotels, guesthouses, B&Bs, self-catering cottages and apartments, touring caravans and camping, holiday parks and hostels.

Throughout the year provisional monthly summaries of occupancy rates by accommodation type, grade, location, tariff and size of establishment are published on the Welsh Government website <http://wales.gov.uk/statistics-and-research/wales-tourism-accommodation-occupancy-surveys/?lang=en> At the end of the year, the analysis of survey data is re-run enabling the inclusion of any late returns. The reanalysed results are published in an annual report.

This summary provides top line results. For full results and technical information, please refer to the 2013 Annual Report.

Main results

Hotels

- The average bed and room occupancy rates for 2013 were 45% and 61% respectively. These rates represent a small increase on those recorded in 2012 and are also the highest annual average occupancy rates recorded for this sector since 2003.
- Over the past ten years, the annual average room occupancy rate has risen steadily from 56% in 2003 to 61% in 2013.
- The seasonality of occupancy rates for hotels in Wales continued to be evident in 2013. The average bed occupancy rate rose from 27% in January to a peak of 59% in August before falling to 35% in December. The average room occupancy rate also followed a similar pattern starting the year at 40% before rising to 74% in August and ending the year at 50% in December.

Guest Houses and Bed and Breakfasts

- The 2013 annual averages represent a small increase on the 2012 figures (up 1% for both bedspace and room occupancy). However, the highest rates over the past ten years were recorded in 2004 and 2005 and since then there has been a gradual trend of falling occupancy rates in this sector.
- As in previous years, the seasonality of the Guest House/ B&B sector in Wales remains evident in 2013. The average room occupancy rate rose from 12% in January to 57% in August and then fell back to 19% in December.

Analyst: Robert Lewis **Tel:** 0300 061 6026 **E-mail:** Robert.Lewis@wales.gsi.gov.uk
www.twitter.com/statisticswales | www.twitter.com/ystadegaucymru

Cyhoeddwyd gan Y Gwasanaethau Gwybodaeth a Dadansoddi
Llywodraeth Cymru, Parc Cathays, Caerdydd, CF10 3NQ
Ffôn – Swyddfa'r Wasg **029 2089 8099**, Ymholiadau Cyhoeddus **029 2082 3332**
www.cymru.gov.uk/ystadegau

Issued by Knowledge and Analytical Services
Welsh Government, Cathays Park, Cardiff, CF10 3NQ
Telephone – Press Office **029 2089 8099**, Public Enquiries **029 2082 5050**
www.wales.gov.uk/statistics



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Self-Catering Cottages and Apartments

- The monthly unit occupancy rate for all properties in 2013, as in previous years, varies considerably throughout the year, reflecting the seasonal nature of this sector. A unit occupancy rate of 28% was recorded in January which rose to a peak of 82% in August before falling to 30% in November and 33% in December.
- The annual average for all properties in 2013 was 50%, down from the figure of 53% recorded in 2012. The May-October average was 64%, slightly up (from 63%) in these months in 2012.
- The average annual occupancy rate for properties let via Agencies was higher (57%). The May-October average for Agency lets was also higher than average (at 71%). This was 5% up on the same period in 2012.

Caravan Holiday Homes and Chalets

- 78% average unit occupancy during the March-October period in represents a six percentage point decrease from 2012, though is still slightly above the seasonal average for the past seven years.

Touring Caravans and Camping

- The seasonal average occupancy rate (28%) from this sector (May to October, inclusive) was some 4% down on 2012, though sites in coastal locations recorded 33% average occupancy over the period.

Hostels and Bunkhouses

- The annual average monthly occupancy rate for 2013 in this sector (42%) was very marginally down on 2012 (43%). There is considerable seasonal variation, however, with January occupancy being 15%, rising to 68% in August and falling back to 26% December - exactly the same pattern as in 2012.