

Wales Occupancy Survey

2012 Annual Report



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Executive Summary

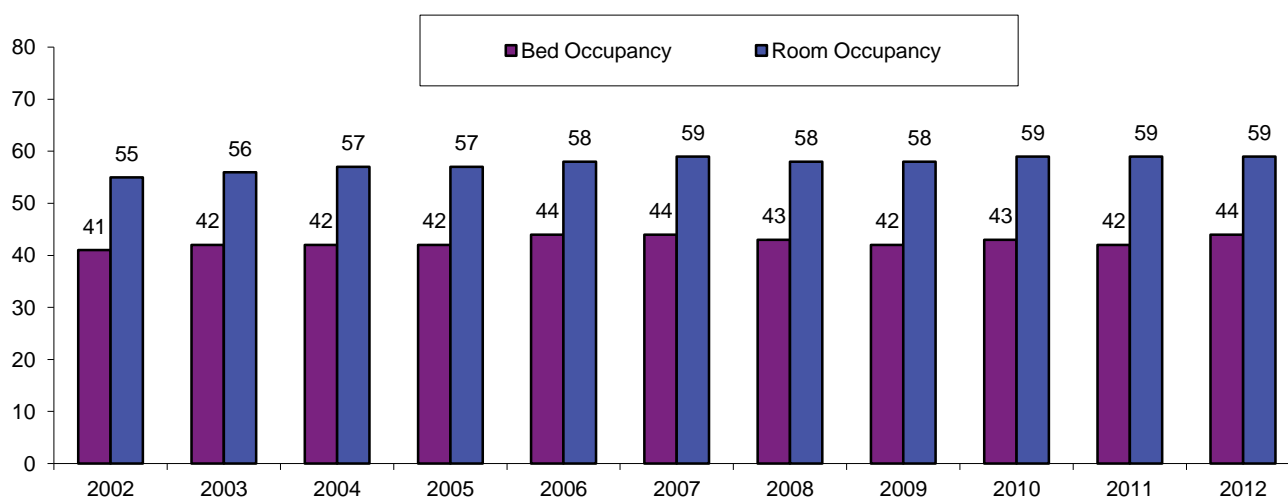
An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to include all serviced accommodation including guest houses and bed and breakfast establishments, as well as non-graded serviced accommodation.

The self catering survey has been conducted in varying formats since 1987. The survey covers self catering accommodation, caravan holiday homes, touring caravan and camping parks. In addition, in 2008, hostels and bunk houses were also included within the coverage of the survey.

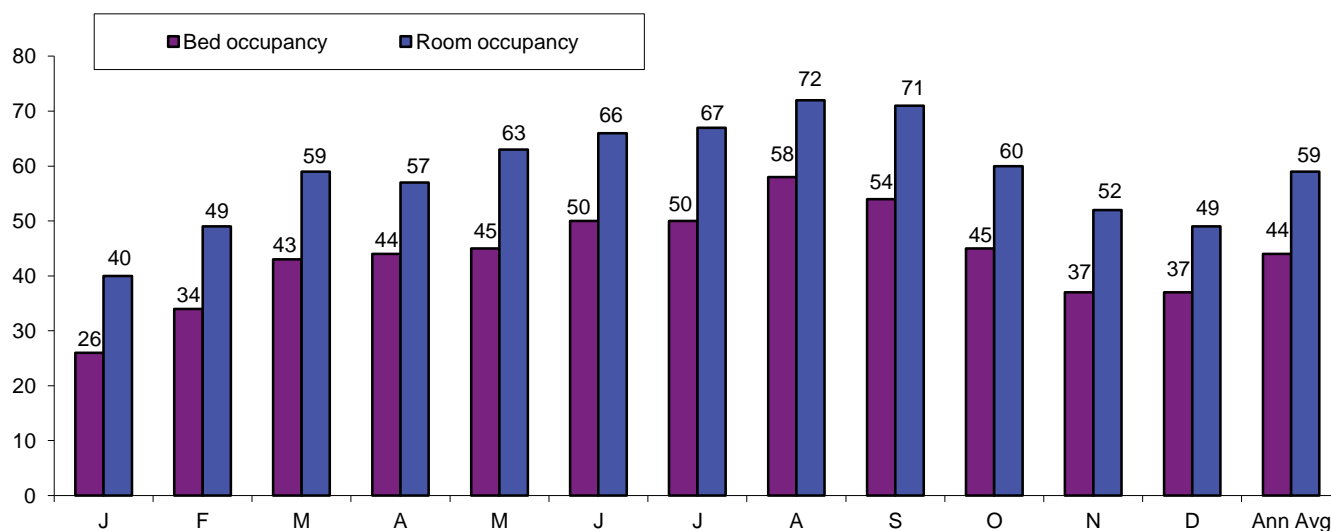
Hotels

The annual average bed and room occupancy rates in 2012 were 44% and 59% respectively. Both rates are the same as those recorded in 2007, with a slight increase on the 2011 rate for bed occupancy (42% in 2011). This continues the steady consistency recorded for these rates over the years, with bed occupancy in the range 41% to 44% and room occupancy in the range 55% to 59% since 2002.

Figure 1-1 - Hotels - Trends in Occupancy Rates - Annual Averages (%)



The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2012 are presented in Figure 1-2 overleaf.

Figure 1-2 - Hotels - Monthly Bed & Room Occupancy – 2012 (%)

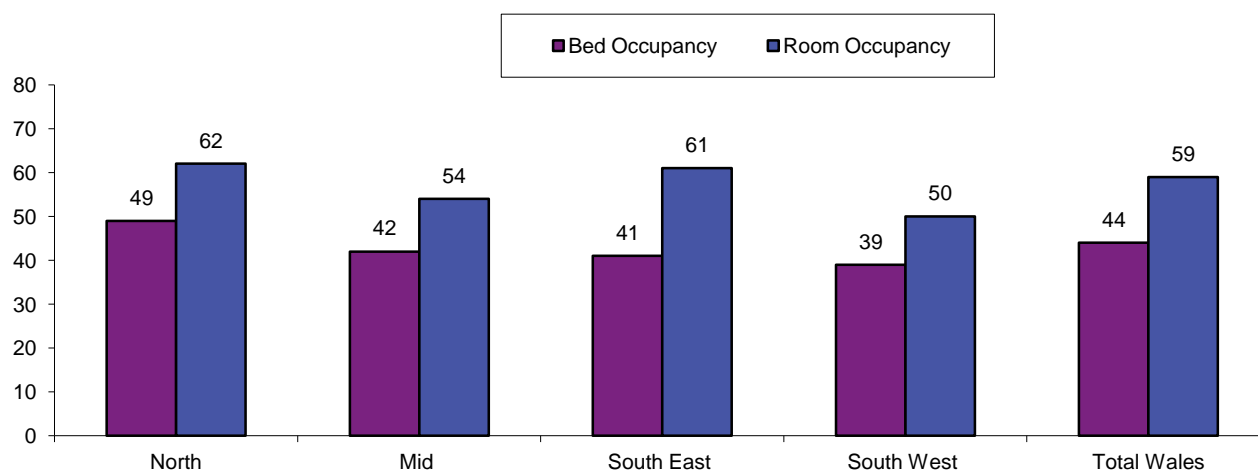
As in previous years, the seasonality of the hotel sector was reflected in the monthly average bed and room occupancy rates recorded in 2012. The average bed occupancy rate began at 26% in January 2012 before rising to a peak of 58% in August and decreasing to 37% in November. Likewise, the average room occupancy rate was higher during the summer months, with rates of 66% to 72% recorded between June and September, with the lowest rate recorded in January (40%).

See pages 16-17 for information on monthly Hotel occupancy.

Regional Occupancy Rates

Figure 1-3 below presents the annual average bed and room occupancy rates for each region of Wales.

Figure 1-3 - Hotels - Annual Average by Regions of Wales – 2012 (%)



In 2012, the highest annual average bed occupancy rate was recorded by establishments in North Wales (49%), while those in Mid Wales recorded a rate of 42% and South West Wales a rate of 39%. In 2011, hotels in South East Wales recorded an annual average of 38%, which was four percentage points lower than that recorded for this region in 2010 (42%). The rate for this region rose again in 2012 to 41%.

There was greater variation between the regions when analysed by their annual average room occupancy rate in 2012, as has been the case in previous years. Establishments located in the North and South East recorded similar annual average room occupancy rates of 62% and 61% respectively, while establishments in the South West recorded an annual average of 50% and those in Mid Wales the an annual average of 54%.

See pages 18-19 for information on regional Hotel occupancy.

Percentage of Overseas Guests

As would be expected, overseas occupancy was highest during the main tourist season. An average of 6% was recorded in July and 7% in August 2012. While the lowest percentage recorded throughout the year was in November (2%), the rate recorded for June was also low at 3%. Lower than average temperatures and sunshine hours plus higher than average rainfall were recorded for a number of summer months in 2012 in Wales, with the rainfall particularly high during June. The annual average proportion of overseas guests was 4%.

See pages 19-21 for more information on Hotel overseas occupancy.

Percentage of Business Guests

As in previous years, the percentage of business guests was highest at the start and end of the year, a converse trend to that for overall occupancy rates but one which is well-established for UK destinations. The proportion of business guests recorded in January 2012 was 27%, a rate which decreased to its lowest point in August and September 2012 (6%) before increasing to 12% in December 2012. The decrease between March and April 2012 (11% to 7%) is likely to reflect the start of the main tourist season.

The annual average proportion of business guests has generally been in decline since 2004. The 2012 rate of 9% represents a decrease of five percentage points on the 2011 rate of 14% and the lowest annual average business occupancy rate recorded since 2003. When analysed by month, decreases were recorded for most months of the year, particularly during March (19% in 2011 to 11% in 2012) and November (21% to 11%), both of which are shoulder months when business occupancy tends to be higher and that usually boost the overall annual business occupancy rate. In 2012, several establishments that provided the data in 2011 did not do so in 2012, which has contributed to the decreases recorded for this rate in 2012.

See pages 22-23 for further information on hotel business occupancy rates.

Occupancy by Size of Hotel

Overall, occupancy surveys over the years have recorded a positive correlation between size and bed occupancy rates. In 2012, this is somewhat less evident for the annual average bed occupancy rates recorded, with the highest rates were recorded by establishments with 26 rooms or more (in the range 45%-46% in 2012). The general correlation between hotel size and occupancy rates is clearer for the annual average room occupancy rates recorded. Hotels with between 51 and 100 rooms recorded an annual average bed occupancy rate of 65% and those with over 100 rooms a rate of 64% compared to 49% amongst those with 4 to 10 rooms.

As reported previously, there are a number of factors which could have contributed to this overall positive correlation. Larger hotels tend to be open all year and are more likely to actively market their establishments. Also, many of these are located in cities and large towns, making them more likely to have business guests occupying single rooms.

The largest annual average room occupancy increase was recorded for those with between 26 and 50 rooms, with the 2012 rate of 62% six percentage points higher than the rate recorded for these establishments in 2011 (56%) and equal to that recorded in 2008.

See pages 24-25 for further information on hotel occupancy by size.

Occupancy by Tariff

Once again, there was a generally positive relationship between the tariff charged and occupancy levels for hotels in 2012. Establishments charging £50 or more recorded the highest annual average bed occupancy rates (46% for those charging £50-£59.99), a rate which is five percentage points higher than that recorded for establishments charging £30-£39.99. Establishments in the highest tariff band also recorded the highest annual average room occupancy rate, which at 61% was twelve percentage points higher than the rate recorded by establishments in the £30-£39.99 category. It is likely that hotels in the highest tariff band attracted a greater proportion of business guests making use of single occupancy rooms.

For hotels charging £40-£49.99 and those charging £60 or more, the annual average room occupancy rates remained similar in 2012 to those recorded in 2011. Since 2009, the annual average room occupancy rate for establishments charging £30-£39.99 has risen year-on-year with the 2012 rate of 49% three percentage points higher than the 2011 rate of 46%. Those charging £50-£59.99 recorded a decrease in 2012 of three percentage points (60% to 57%), however, this rate remains higher than the 2009 rate of 54%.

See pages 25-26 for further information on hotel occupancy by tariff.

Occupancy by Location

Occupancy rates were analysed according to the location of the hotel - in a city/large town, a small town, at the seaside or in the countryside/village.

As in previous years, establishments located in cities and large towns recorded the highest annual average room occupancy rate in 2012 (64%). As in 2011, it was establishments in seaside areas that recorded the highest annual average bed occupancy rate, with a rate of 47% recorded for these establishments in 2012. The lowest annual average bed occupancy rates were recorded for hotels in small towns and countryside locations (41%), while the lowest annual average room occupancy rate was recorded for hotels in countryside/village locations (53%). In 2011, the largest differentials between annual average bed and room occupancy rates were recorded for establishments in small towns and cities/large towns (twenty percentage points each).

Following decreases in 2011, the annual average room occupancy rates for establishments in cities/large towns and small towns rose in 2012 (62% to 64% and 59% to 61% respectively). On the other hand, establishments located in seaside and countryside/village locations recorded annual average room occupancy rates which were identical to those recorded for these areas in 2010 (59% and 53% respectively).

See page 27 for further information on hotel occupancy by location.

Occupancy by Grading

Since 1999, occupancy rates for hotels have been analysed according to their grading under the Star Grading Scheme administered by Visit Wales.

As in a number of previous years, hotels not graded within the Visit Wales grading scheme recorded the lowest annual average occupancy rates, with an annual average bed occupancy rate of 39% and an

annual average room occupancy rate of 53% recorded for these establishments in 2012. Hotels with the highest star grading recorded the highest annual averages, with rates of 59% and 77% recorded for the annual bed and room occupancy rates respectively.

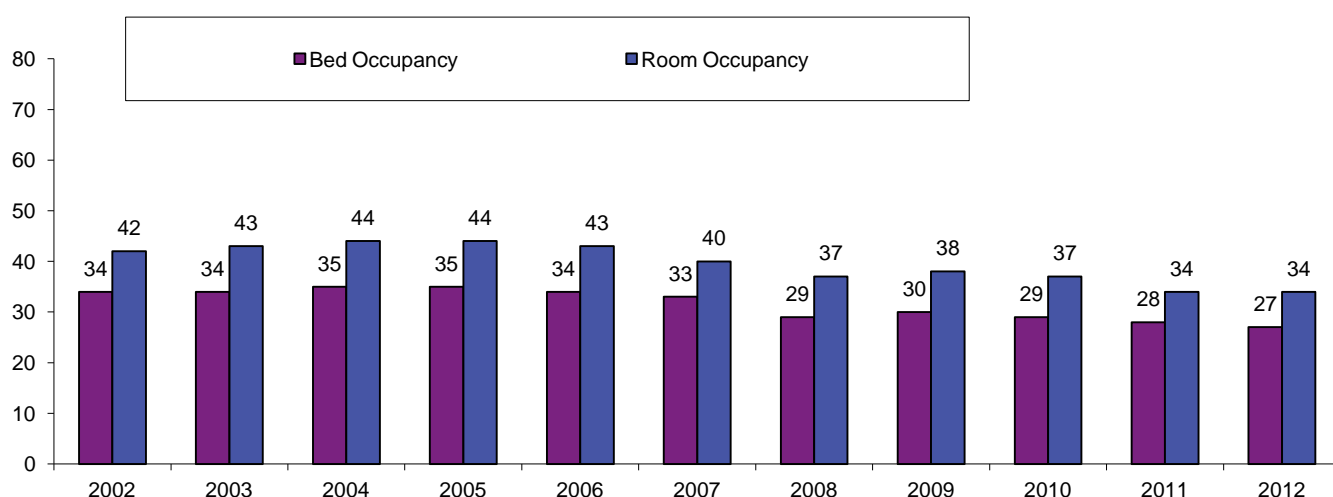
See pages 28-29 for further information on hotel occupancy by grading.

Guest Houses and Bed and Breakfasts

Annual Average Bed and Room Occupancy

Overall occupancy rates for Guest Houses and Bed and Breakfasts have been in general decline since 2009. The 2012 annual bed occupancy rate continued to fall slightly in 2012 to 27%, the lowest rate recorded over the last decade. While the annual average room occupancy rate for 2012 was also at its lowest point over this period, it remained consistent with the 2011 rate of 34%.

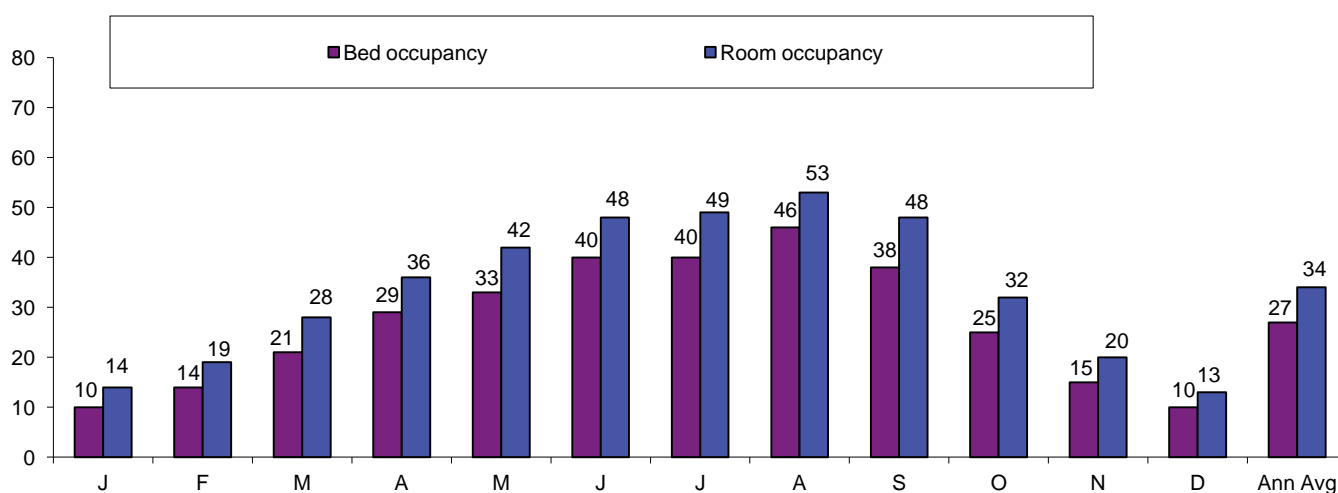
Figure 1-4 - Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the guest house and bed and breakfast sectors in 2012 are presented in Figure 1-5 below.

Figure 1-5 - Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2012 (%)

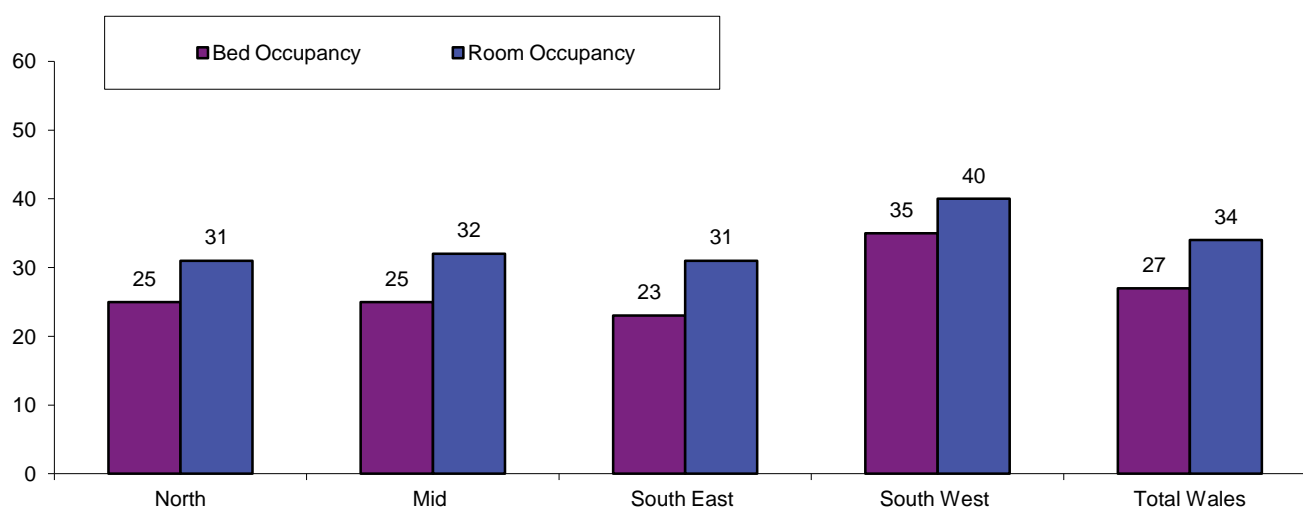


As in previous years, the seasonal nature of the Guest House and Bed and Breakfast sector remained evident in 2012 with average bed occupancy rates at their highest during the main tourist season (May to September). Bed occupancy levels varied from 10% in January to a peak of 46% in August before decreasing to 10% in December. Room occupancy levels followed a similar pattern climbing from 14% in January to 53% in August before decreasing to 13% in December 2012.

See pages 31-32 for further information on Guest House/ B&B monthly occupancy rates.

Regional Occupancy Rates

Figure 1-6 - Guest Houses/B&Bs - Annual Average by Regions of Wales – 2012 (%)



The annual average bed and room occupancy rates were highest for the South West region in 2012 (35% and 40% respectively). Establishments in North Wales recorded an annual average bed occupancy rate of 25%, a rate equal to that recorded by establishments in Mid Wales and slightly higher than that recorded for those located in South East Wales (23%). The annual average room occupancy rate for South West Wales (40%) was nine percentage points higher than the rates recorded by establishments in North Wales and the South East (31% in each case).

Increases in the annual average room occupancy rate were recorded for establishments located in the South of Wales, particularly in the South East region. In 2011, the annual average room occupancy rate for South East Wales (32%) was thirteen percentage points lower than in 2010 and was at its lowest rate since 2001. In 2012, the annual average room occupancy rate for this region increase by six percentage points to 31%. It should be borne in mind that the sample size for the South East region for business occupancy is low and that not all of those who did supply business occupancy data did so for every month, therefore, results should be treated with caution.

See pages 32-33 for further information on Guest House/B&B regional occupancy rates.

Percentage of Overseas Guests

As in most previous years, during 2012, the percentage of overseas guests was highest during the June to September period in 2012 with rates of 13% to 17% recorded, although 2012 did get off to a strong start in terms of the proportion of guests from outside the UK (11% in January and 12% in February

2012). The percentage of overseas guests fell from 11% in September 2012 to a steady rate of 6% for October, November and December 2012. The annual average overseas bednight rate for 2012 was 11%.

See pages 33-34 for further information on Guest House/B&B overseas occupancy.

Occupancy by Size of Guest House/Bed & Breakfast

As reported previously for this sector and for hotels, there would appear to be a positive relationship between occupancy rates and establishment size. Establishments with 4-10 rooms recorded annual average bed and room occupancy rates of 30% and 36% respectively compared to 23% and 29% respectively amongst those with 1-3 rooms. The higher occupancy amongst these establishments is likely to be a result of a number of factors including the fact that larger establishments are more likely to be open all year and they are also more likely to attract business guests.

While the annual average room occupancy rate remains higher for larger establishments (4-10 rooms) than for those with fewer rooms in 2012, these establishments recorded a slight decrease in their annual average room occupancy rate (37% in 2011 to 36% in 2012). In contrast, the annual average room occupancy rate for those with between 1 and 3 rooms rose over the same time period from 27% to 29%.

See pages 37-38 for further information on Guest House/B&B occupancy by size.

Occupancy by Tariff

While in previous years, there has appeared to be a positive correlation between tariff and occupancy levels, there was greater similarity in the rates recorded for the two higher tariff bands shown below in 2012. When compared to those charging £20-£29.99, the annual average bed occupancy rates for those charging over £30 were eight to nine percentage points higher, while their annual average room occupancy rates were seven percentage points higher in 2012.

Between 2011 and 2012, the annual average room occupancy rates for establishments charging £30-£39.99 and those charging £40-£49.99 remained level (both at 35%). Following year-on-year declining rates between 2006 and 2011, those charging £20-£29.99 recorded an increase of four percentage points, which brought the annual average room occupancy rate for these establishments to 28% in 2012.

See pages 38-39 for further information on Guest House/B&B occupancy by tariff.

Occupancy by Location

In 2010 and 2011, occupancy rates were highest in seaside areas, however, the rates recorded for establishments in these areas (30% annual average bed occupancy, 36% annual average room occupancy) were more similar to those for other areas in 2012. Those in cities/ large towns recorded annual average bed and room occupancy rates of 32% and 45% respectively, similar to those recorded for small towns (30% and 43% respectively) but higher than for establishments in country/village locations (26% and 31% respectively).

See page 40 for further information on Guest House/B&B occupancy by location.

Occupancy by Grading

There was a positive correlation between occupancy level and grading, with ungraded establishments recording the lowest annual average bed and room occupancy rates of seventeen and nineteen percentage points respectively. Establishments with a 5 star grading recorded a lower annual average bed occupancy rate than those with 4 stars (28% and 31% respectively), as well as a lower annual average room occupancy rate (32% and 37% respectively).

Between 2011 and 2012, the largest decrease was recorded for ungraded establishment, with a rate of 24% in 2011 and 19% in 2012 for these establishments. Both those with 3 stars and those with a 4 star grading recorded slight increases in their annual average room occupancy rates (one percentage point each), while this rate continued to decrease for 5 star establishments in 2012 (35% in 2011 to 32% in 2012).

See pages 41-42 for further information on Guest House/B&B occupancy by grading.

All Serviced Accommodation

The annual average bed occupancy rate for all serviced accommodation remained consistent at 38% between 2008 and 2011, with a slight increase in 2012 bringing this rate to 39%. The annual average room occupancy rate was 52%, a rate which has been recorded for all serviced accommodation since 2008.

As in previous years, seasonality is again evident in the monthly occupancy rates for all serviced accommodation. Between May and September, the average bed occupancy rate was in the range 42% - 55%, while the average room occupancy rate was in the range 57% - 67% during the same period.

The annual average percentage of overseas guests was consistently around 7% between 2008 and 2011, with a slight decrease in 2012 to 6%. There has been some variation when analysed by individual months over the past five years, particularly outside of the main tourist season.

See pages 43-44 for further details on All Serviced occupancy rates.

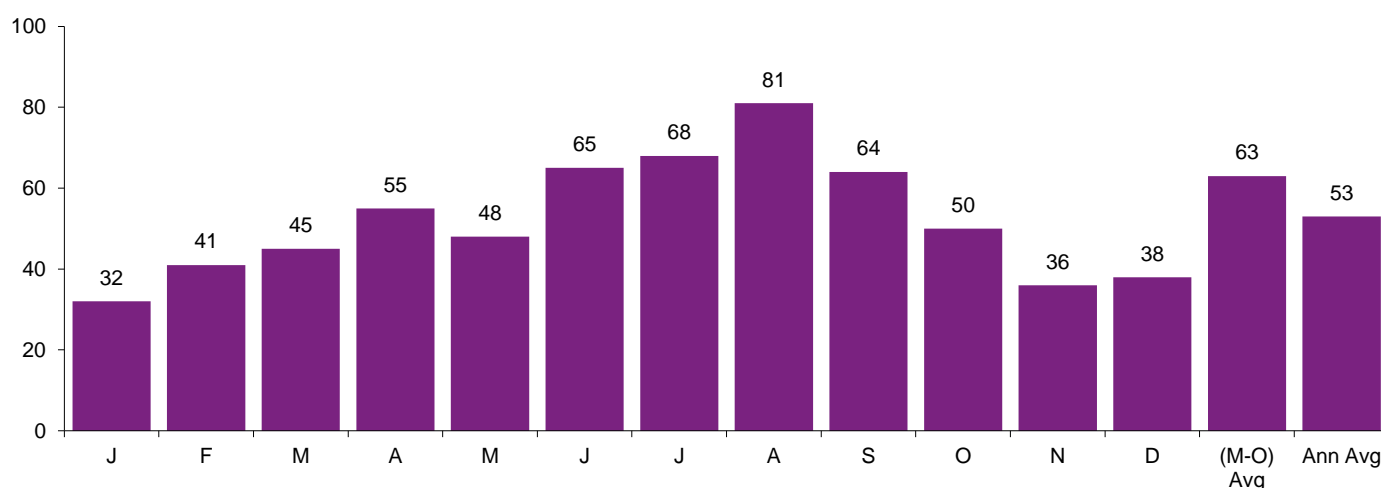
Self catering Accommodation

Cottages and Apartments

Monthly Unit Occupancy

Figure 1-7 below presents annual occupancy rates for 2012 across both independent and agency operators.

Figure 1-7- Monthly Unit Occupancy – Cottages and Apartments



The monthly unit occupancy rate for all properties in 2012, as in previous years, varies considerably throughout the year, reflecting the seasonal nature of this sector. An average monthly unit occupancy rate of 32% was recorded for January 2012, a figure which increased to 81% in August before falling to 36% in November and 38% in December.

Table 1-1- Monthly Unit Occupancy – Cottages and Apartments ALL (%)

	Average Unit Occupancy				
	2008	2009	2010	2011	2012
January	24	20	17	29	32
February	37	43	34	42	41
March	39	41	37	38	45
April	48	51	49	63	55
May	54	55	53	65	48
June	57	56	60	65	65
July	64	67	67	71	68
August	81	75	81	85	81
September	62	61	60	72	64
October	50	45	31	55	50
November	25	22	22	31	36
December	36	48	35	32	38
May – October average	61	60	59	69	63
Annual average	48	50	45	54	53

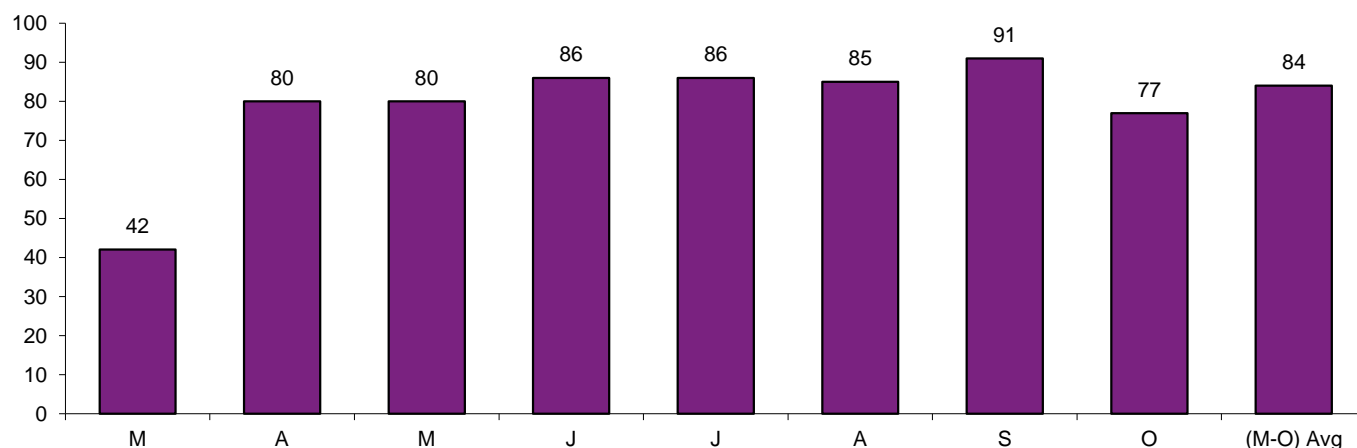
The monthly unit occupancy rate for all properties in 2012, as in previous years, varies considerably throughout the year, reflecting the seasonal nature of this sector. An average monthly unit occupancy rate of 32% was recorded for January 2012, a figure which increased to 81% in August before falling to 36% in November and 38% in December. Between March and April 2012, the average monthly unit occupancy rate increased by ten percentage points from 45% to 55% respectively. This is a smaller increase than was recorded in 2011, likely due to the early timing of Easter and the impact of poorer weather conditions in April 2012.

Table 1-2 - Monthly Unit Occupancy – Cottages and Apartments - Agency (%)

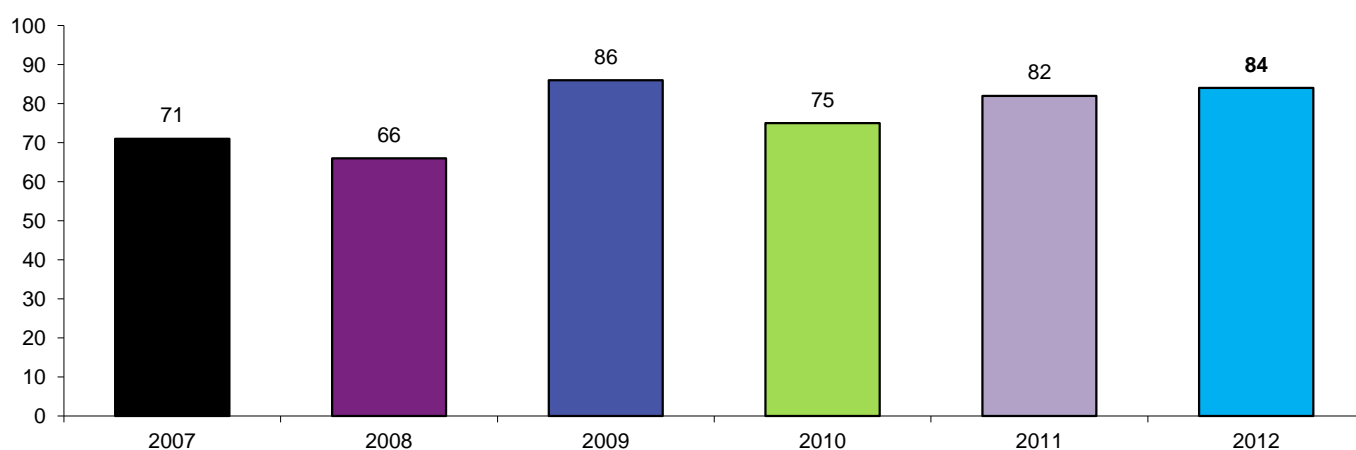
	Average Unit Occupancy				
	2008	2009	2010	2011	2012
January	24	16	13	34	41
February	36	45	35	46	48
March	35	44	39	44	57
April	47	49	44	64	58
May	51	52	49	69	52
June	51	43	56	70	70
July	59	54	64	73	69
August	78	63	78	84	83
September	58	51	56	75	68
October	44	36	21	62	56
November	23	17	20	40	42
December	29	57	38	34	50
<i>May – October average</i>	<i>57</i>	<i>50</i>	<i>54</i>	<i>72</i>	<i>66</i>
<i>Annual average</i>	<i>45</i>	<i>44</i>	<i>43</i>	<i>58</i>	<i>58</i>

In 2012, the average monthly unit occupancy rate for properties let by an agent ranged from 41% in January to 83% in August to 42% in November and 50% in December. While the highest monthly averages were recorded during the summer months of June, July and August (70%, 69% and 83% respectively), the largest increases between 2011 and 2012 were recorded outside of the main summer season with an increase of nine percentage points in January 2012 (34% to 41%) and fourteen in December (34% to 50%).

See pages 46-57 for further information on Self-catering occupancy data.

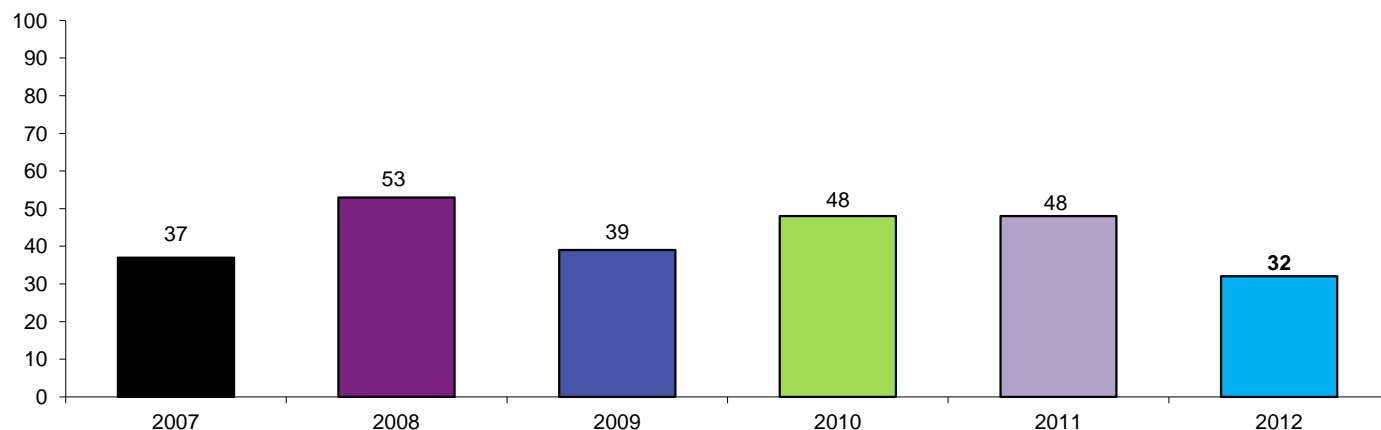
*Caravan Holiday Homes***Figure 1-8 - Monthly Unit Occupancy – Caravan Holiday Homes - 2012 (%)**

As in previous years, the monthly unit occupancy for caravan holiday homes increased considerably between March and April in 2012 (forty-two percentage points to 80%). This highlights the importance of the Easter Holiday period to this accommodation sector – Easter was in early April in 2012. It is likely that a greater number of sites opened in April to take advantage of the Easter Holiday period. Since 2009, the average unit occupancy rates for May to July have shown the greatest consistency, while rates for September have shown a greater degree of variation.

Figure 1-9 – Seasonal averages – Caravan Holiday Homes 2007 - 2012 (%)

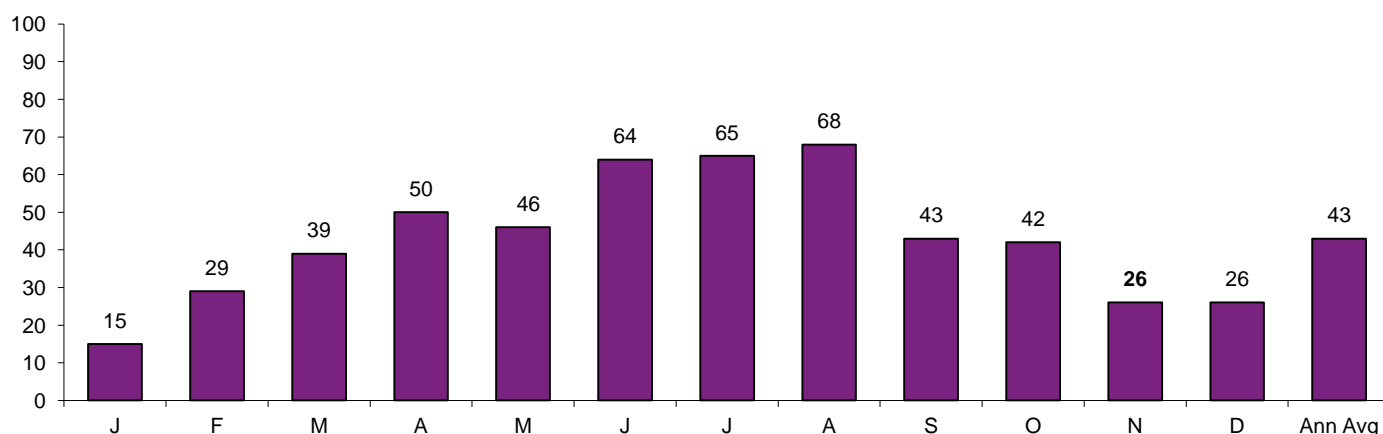
At 84%, the May to October average for 2012 is two percentage points higher than the comparable 2011 rate of 82% and continues the increases recorded since 2010 (where a rate of 75% was recorded). This makes the 2012 May to October average the second highest recorded since 2007.

See pages 58-61 for further information on Caravan Holiday Home occupancy.

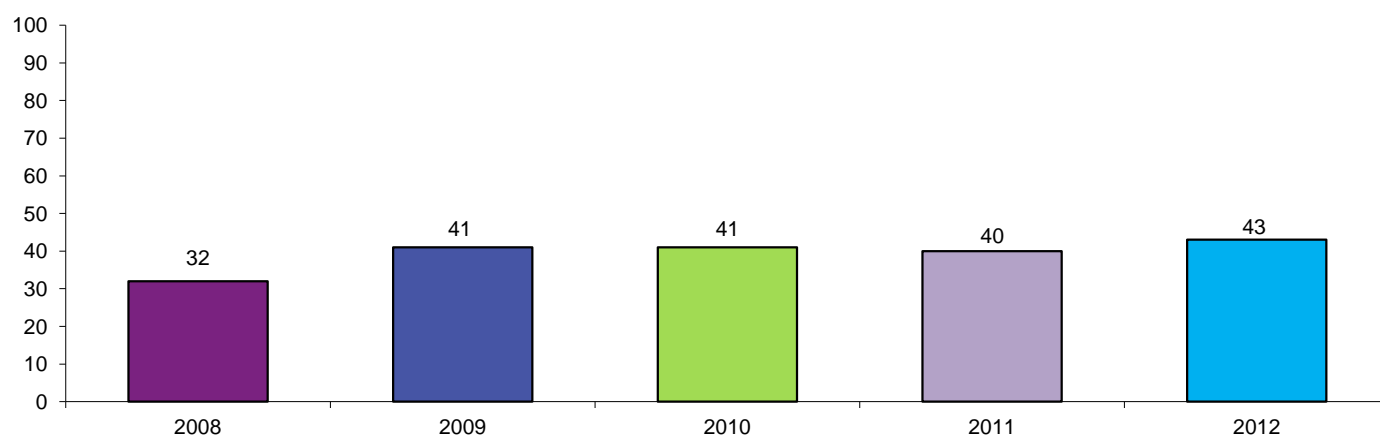
*Touring Caravan and Camping Parks***Figure 1-10 - Seasonal Averages – Touring Caravan and Camping Parks 2007 – 2012 (%)**

The May to October average for touring parks has shown a considerable degree of variation over the years. The rate for 2007 was 37%, a figure which rose to 53% in 2008 before falling to 39% in 2009. The 2010 and 2011 rates of 48% are sixteen percentage points higher than the 2012 average of 32%. The relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data.

See pages 62-64 for further information on Touring Caravan and Camping Park occupancy.

*Hostels and Bunkhouses***Figure 1-11 - Monthly Bed Occupancy – Hostels – 2012 (%)**

The monthly average bed occupancy rate for hostels was 15% in January 2012. This figure rose to a peak of 68% in August before decreasing to 26% in November and December. The average bed occupancy rate in March 2012 was 39%, eleven percentage points higher than for the same month in 2011, while the rate for June rose from 53% in 2011 to 64% in 2012. Over the years, the average bed occupancy rates recorded towards the end of the year have demonstrated greater consistency than those recorded during the summer months, with the rates recorded for November and December in the range 22% - 26% since 2009.

Figure 1-12 – Annual Average Bed Occupancy – Hostels – 2008-2012 (%)

The annual average bed occupancy rate for hostels in 2012 was 43%, a three percentage point increase on the rate recorded in 2011 (40%) and the highest recorded by establishments in this sector over the past five years.

See pages 65-69 for further information on Hostel occupancy.

Main findings

An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to include all serviced accommodation including guest houses and bed and breakfast establishments, as well as non-graded serviced accommodation.

The self catering survey has been conducted in varying formats since 1987. The survey covers self catering accommodation, caravan holiday homes, touring caravan and camping parks. In addition, in 2008, hostels and bunk houses were also included within the coverage of the survey.

Where available and appropriate, comparative figures from previous years are presented throughout the report. Sections 3 to 9 examine each of the accommodation sectors as follows:

- Section 3: Hotels
- Section 4: Guest houses and Bed and Breakfast establishments
- Section 5: All Serviced Accommodation
- Section 6: Self catering cottages and apartments
- Section 7: Caravan holiday homes
- Section 8: Touring caravan and camping parks
- Section 9: Hostels and bunkhouses.

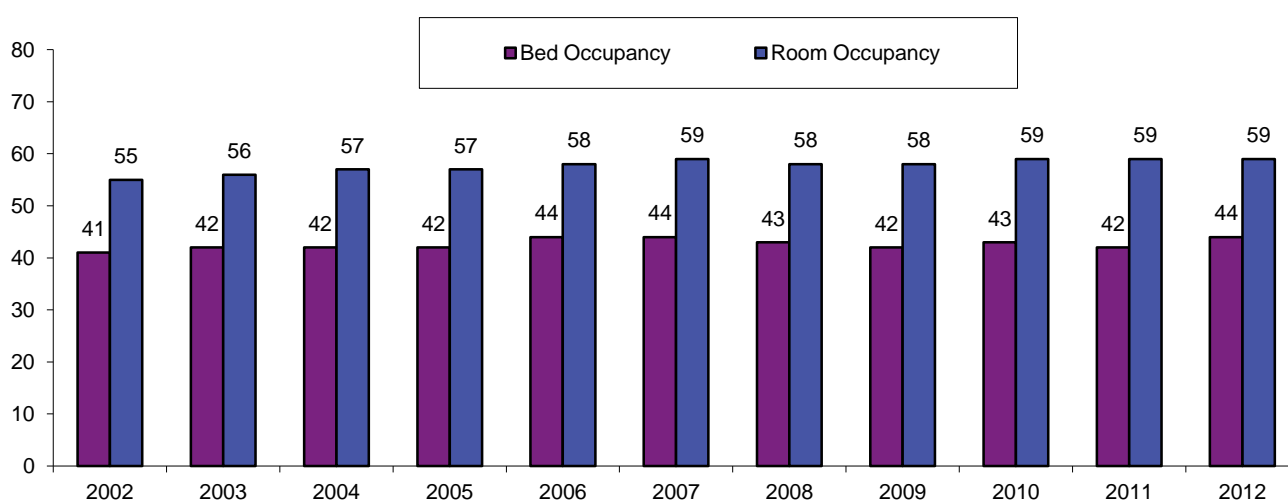
Hotels

Section 3 of the report presents the monthly and annual average bed and room occupancy levels for hotels. For details of the survey methodology, there is a separate technical appendix available.

Annual Average Bed and Room Occupancy

The annual average bed and room occupancy rates in 2012 were 44% and 59% respectively. Both rates are the same as those recorded in 2007, with a slight increase on the 2011 rate for bed occupancy (42% in 2011). This continues the steady consistency recorded for these rates over the years, with bed occupancy in the range 41% to 44% and room occupancy in the range 55% to 59% since 2002.

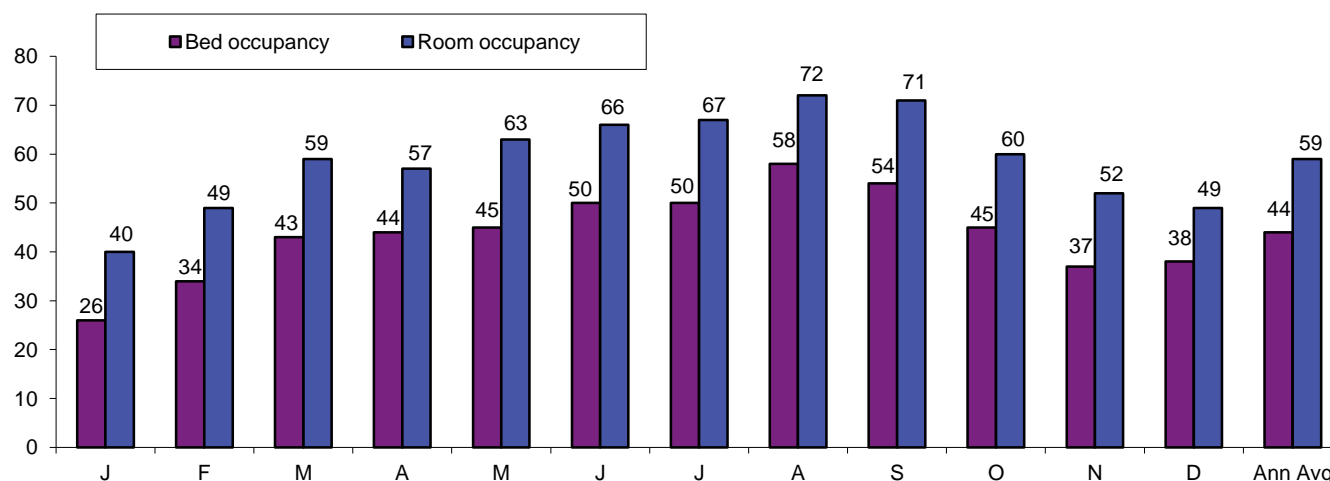
Figure 3-1 - Hotels - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2015 are presented in Figure 3-2 below.

Figure 3-2 - Hotels - Monthly Bed & Room Occupancy – 2012 (%)



As in previous years, the seasonality of the hotel sector was reflected in the monthly average bed and room occupancy rates recorded in 2012. The average bed occupancy rate began at 26% in January 2012 before rising to a peak of 58% in August and decreasing to 38% in December. Likewise, the average room occupancy rate was higher during the summer months, with rates of 66% to 71% recorded between June and September, with the lowest rate recorded in January (40%).

Table 3-1 - Hotels - Trends in Room Occupancy Rates - Monthly Averages (%)

	Room occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
January	36	37	35	40	38	40	39	40	39	40	40
February	47	48	49	48	50	50	50	48	50	53	49
March	50	50	52	52	51	53	54	51	53	56	59
April	52	56	54	57	58	58	56	58	60	61	57
May	60	62	63	63	65	65	66	62	64	64	63
June	63	63	65	65	66	67	66	68	69	68	66
July	65	66	67	67	70	67	67	70	70	69	67
August	67	69	68	69	73	73	71	70	69	67	72
September	65	67	69	69	71	71	69	69	70	68	71
October	58	58	58	58	61	62	61	63	63	61	60
November	50	50	52	50	53	55	54	54	54	56	52
December	42	43	45	43	44	47	45	47	42	44	49
Annual Average	55	56	57	57	58	59	58	58	59	59	59

There was a greater degree of variation in average room occupancy rates between 2011 and 2012 when analysed on a monthly basis. Increases were recorded for the months of August (67% to 72%) and September (68% to 71%), as well as during the final month of the year (44% in 2011 to 49% in 2012 for December). However, decreases were also recorded, particularly in April where the average room

occupancy rate fell from 61% in 2011 to 57% in 2012. Although Easter fell in April 2012, the holidays were early in the month and were accompanied by lower than average temperatures and sunshine levels, as well as higher than average rainfall.

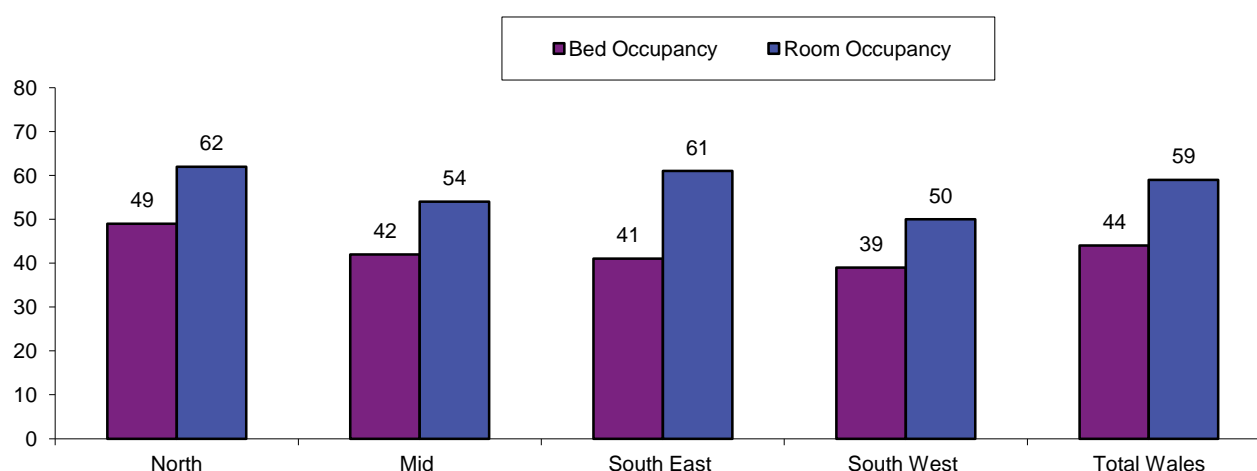
Overall, it is the month of March that has shown the greatest overall increase in average room occupancy over the years, with a rate of 50% recorded in March 2002 compared to 59% in 2012.

Trends in monthly bed occupancy rates since 2002 are presented in Appendix 1a.

Regional Occupancy Rates

Figure 3-3 below presents the annual average bed and room occupancy rates for each region of Wales. The results for South Wales are also presented separately from the South East and South West regions.

Figure 3-3 - Hotels - Annual Average by Regions of Wales – 2012 (%)



In 2012, the highest annual average bed occupancy rate was recorded by establishments in North Wales (49%), while those in Mid Wales recorded a rate of 42% and South West Wales a rate of 39%. In 2011, hotels in South East Wales recorded an annual average of 38%, which was four percentage points lower than that recorded for this region in 2010 (42%). The rate for this region rose again in 2012 to 41%.

There was greater variation between the regions when analysed by their annual average room occupancy rate in 2012, as has been the case in previous years. Establishments located in the North and South East recorded similar annual average room occupancy rates of 62% and 61% respectively, while establishments in the South West recorded an annual average of 50% and those in Mid Wales the an annual average of 54%.

Average bed and room occupancy levels for each region on a monthly basis for 2012 are presented in Appendix 1b and 1c. Please note that due to the small sample size in some areas, this information is not always available.

Trends in Regional Occupancy Rates

Room occupancy rates in the regions of Wales since 2002 are presented in Table 3-2.

Overall, there was a good degree of consistency in the annual average room occupancy rates recorded for the individual regions between 2011 and 2012. Both Mid Wales and South East Wales recorded annual average room occupancy rates that were equal to those recorded in 2011 (54% and 61% respectively), while a slight increase was recorded in the rate for establishments in North Wales (61% in 2011 to 62% in 2012). Although slight (one percentage point), there was a decrease in the annual average room occupancy rate for hotels in South East Wales in 2012 (51% to 50%), which makes this the lowest annual average bed occupancy rate recorded for this region since 2002.

Table 3-2 - Hotels - Trends in Room Occupancy Rates by Regions of Wales (%)

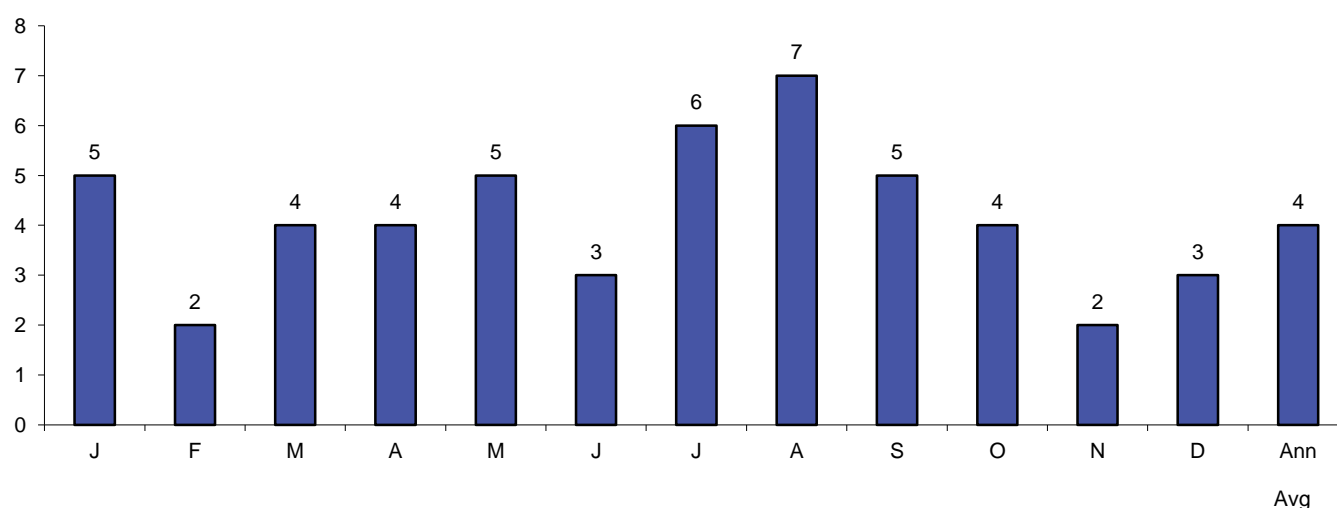
	Annual Average Room Occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Wales	52	53	54	54	57	59	57	62	61	61	62
Mid Wales	49	51	52	52	53	53	50	49	49	54	54
South East Wales	60	62	63	60	63	63	66	62	62	61	61
South West Wales	56	54	55	59	58	58	56	53	54	51	50
TOTAL WALES	55	56	57	57	58	59	58	58	59	59	59

Percentage of Overseas Guests

The forms used to collect occupancy data were updated in 2008 to make them more focussed and efficient. One of the changes affected the way in which information on overseas guests is collected. In previous years, establishments were asked to provide information on the number of new arrivals for each day (both UK and overseas) and the percentage of overseas guests based on the total number of arrivals was presented. This information is now not collected, so consequently, we have presented the proportion of overseas stays as a percentage of bed nights (based on total bed nights).

It is important to highlight that the variation between the different methods of collecting overseas data is a matter of a few decimal places. As an example, the annual 2007 percentage was 4.0% using the old method and 4.1% using the new approach.

In light of these changes, and to ensure consistency that overseas figures across years are compared based on the same methodological process, the amount of trended information presented for overseas guests has been reduced and the focus in this report on the latest 2008 to 2012 results.

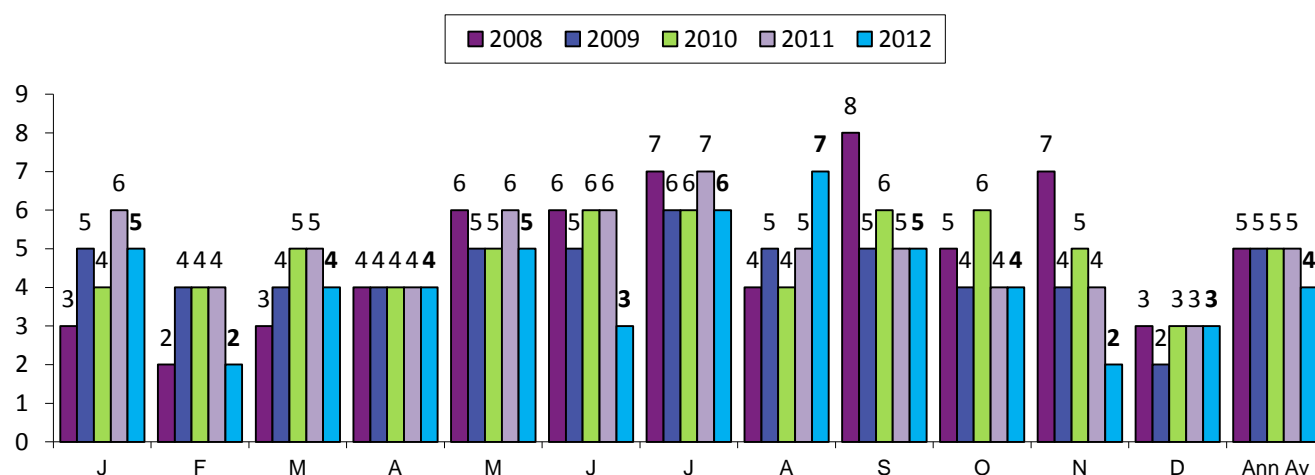
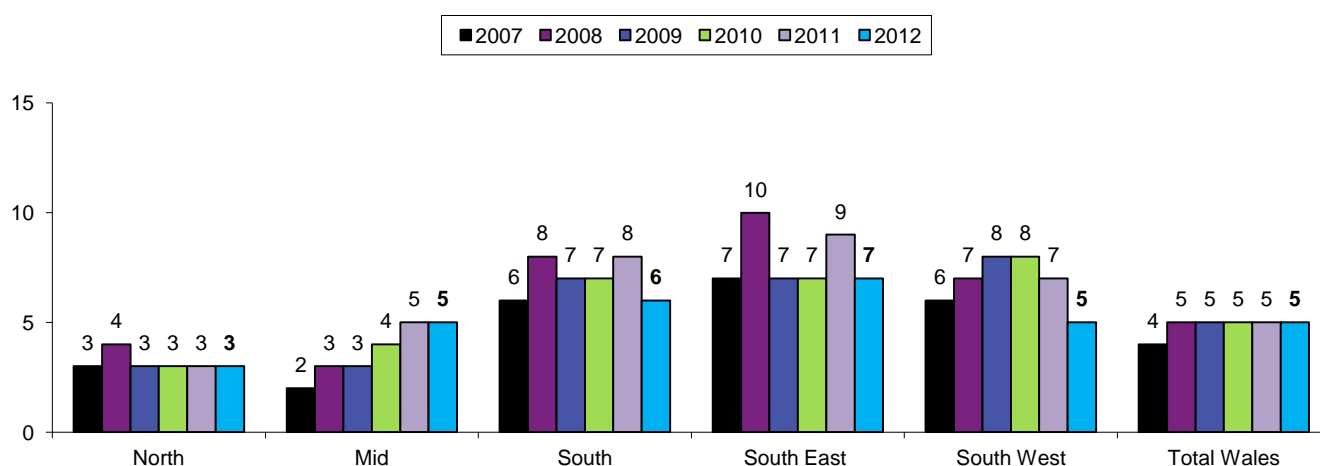
Figure 3-4 - Hotels - Percentage of Overseas Bednights 2012 (%)

As would be expected, overseas occupancy was highest during the main tourist season. An average of 6% was recorded in July and 7% in August 2012. While the lowest percentage recorded throughout the year was in November (2%), the rate recorded for June was also low at 3%. Lower than average temperatures and sunshine hours plus higher than average rainfall were recorded for a number of summer months in 2012 in Wales, with the rainfall particularly high during June. The annual average proportion of overseas guests was 4%.

Trends in Percentage of Overseas Guests

As illustrated in Figure 3-5 overleaf, the annual percentage of overseas guests recorded in 2012 was 4%, a slight decrease on the rates recorded each year from 2008 to 2011 (5%) but a rate that continues to demonstrate a good level of stability.

Monthly overseas occupancy rates have been variable over the last three years, however, given the relatively small proportions recorded, these have not been particularly sizeable variations. The most notable decrease in 2012 was recorded for June, with the percentage of overseas guests falling from 6% in 2010 and 2011 to 3% in 2012. The most consistent month has been April, with a rate of 4% recorded for this month each year since 2008.

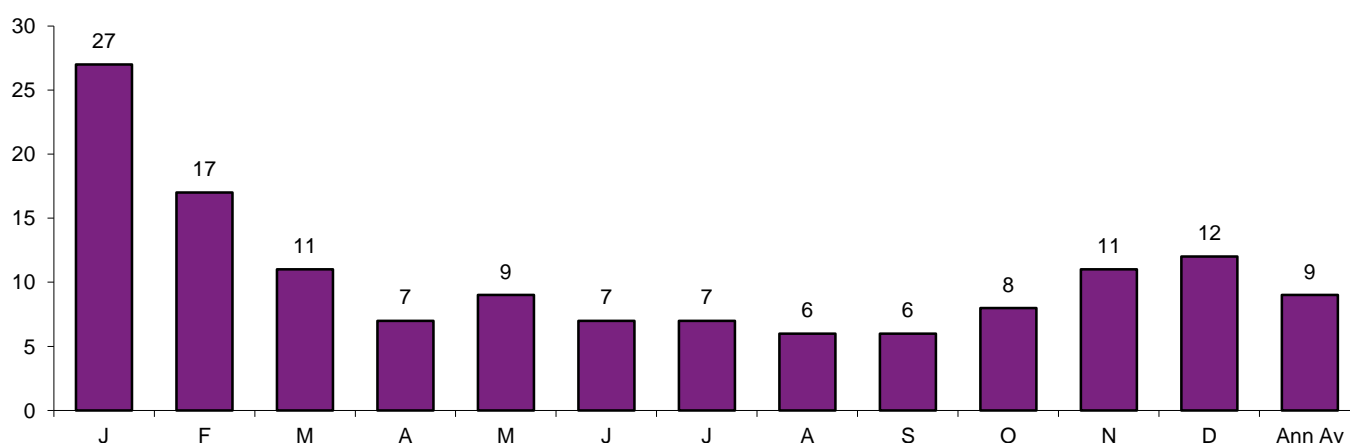
Figure 3-5 - Hotels - Trends in Percentage of Overseas Guests (%)**Figure 3-6 - Hotels - Percentage of Overseas Guests by Region 2008 – 2012 (%)**

The overseas occupancy levels for North Wales and the South East have been relatively stable over recent years, with the annual overseas occupancy rate for North Wales consistently sitting at 3% since 2009 and the South East rate in the range 7%-10% over the past four years. The annual overseas occupancy rate for Mid Wales has increased slightly over the past five years from 3% to 5% (2012 was equal to 2011). Since 2009, the percentage of overseas guests for South West Wales has fallen from 8% to 5%.

Percentage of Business Guests

On the monthly occupancy form, operators are asked to identify the number of guests staying in the hotel each night for business purposes. It should be noted that not all participants provide this information.

Figure 3-7 – Hotels - Percentage of Business Guests 2012 (%)



As in previous years, the percentage of business guests was highest at the start and end of the year, a converse trend to that for overall occupancy rates but one which is well-established for UK destinations and as much a reflection of a smaller base of leisure trips in these months as opposed to increased business activity. The proportion of business guests recorded in January 2012 was 27%, a rate which decreased to its lowest point in August and September 2012 (6%) before increasing to 12% in December 2012. The decrease between March and April 2012 (11% to 7%) is likely to reflect the start of the main tourist season.

As shown in Table 3-3, overleaf, the annual average proportion of business guests has generally been in decline since 2004. The 2012 rate of 9% represents a decrease of five percentage points on the 2011 rate of 14% and the lowest annual average business occupancy rate recorded since 2003. When analysed by month, decreases were recorded for most months of the year, particularly during March (19% in 2011 to 11% in 2012) and November (21% to 11%), both of which are shoulder months when business occupancy tends to be higher and that usually boost the overall annual business occupancy rate.

Table 3-3 Trends in Percentage of Business Guests

	% of business guests									
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
January	36	41	45	41	33	38	31	22	29	27
February	33	38	37	30	25	26	26	19	21	17
March	30	39	30	28	21	19	24	20	19	11
April	21	25	26	15	15	24	17	13	9	7
May	18	24	19	17	18	16	16	15	15	9
June	19	20	21	17	16	19	20	14	12	7
July	17	22	19	17	14	18	17	13	11	7
August	13	15	14	14	10	11	11	9	9	6
September	20	21	22	15	12	18	14	12	10	6
October	28	25	25	21	15	21	18	15	13	8
November	38	38	34	24	23	28	19	24	21	11
December	26	24	28	18	24	21	17	20	14	12
Annual Average	23	27	25	20	18	20	18	15	14	9

Please note that not all establishments provide business occupancy data. In 2012, several establishments that provided the data in 2011 did not do so in 2012, which has contributed to the decreases recorded for this rate in 2012.

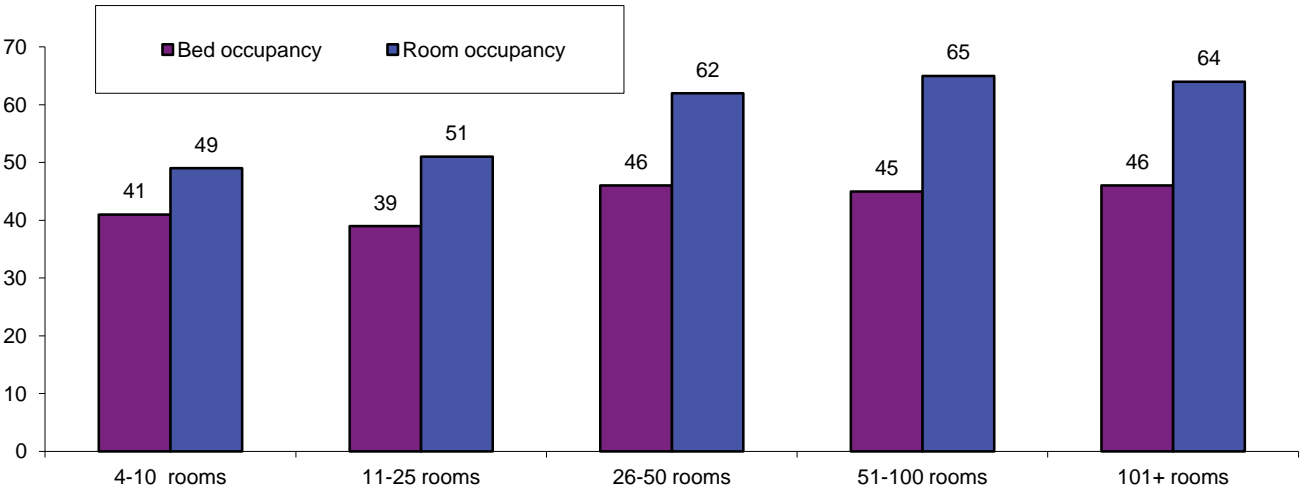
Detailed Analysis of Main Results

This section of the report looks in more detail at different attributes of the hotels and their influence, if any, on levels of bed and room occupancy.

Occupancy by Size of Hotel

The annual average bed and room occupancy figures by size of hotel for 2012 are presented in Figure 3-8 below. Due to the small sample size there is no analysis for hotels with 1-3 rooms. The monthly bed and room occupancy levels for each of the size categories used in the analysis are detailed in Appendix 1b and 1c of this report.

Figure 3-8 - Annual Occupancy by Size of Hotel - 2012 (%)



Overall, occupancy surveys over the years have recorded a positive correlation between size and bed occupancy rates. In 2012, this is somewhat less evident for the annual average bed occupancy rates recorded, with the highest rates were recorded by establishments with 26 rooms or more (in the range 45%-46% in 2012). The general correlation between hotel size and occupancy rates is clearer for the annual average room occupancy rates recorded. Hotels with between 51 and 100 rooms recorded an annual average bed occupancy rate of 65% and those with over 100 rooms, there was a rate of 64% compared to 49% amongst those with 4 to 10 rooms.

As reported previously, there are a number of factors which could have contributed to this overall positive correlation. Larger hotels tend to be open all year and are more likely to benefit from larger marketing budgets.. Also, many of these are located in cities and large towns, making them more likely to have business guests occupying single rooms.

Table 3-4 - Trends in Annual Room Occupancy Rates by Size of Hotel (%)

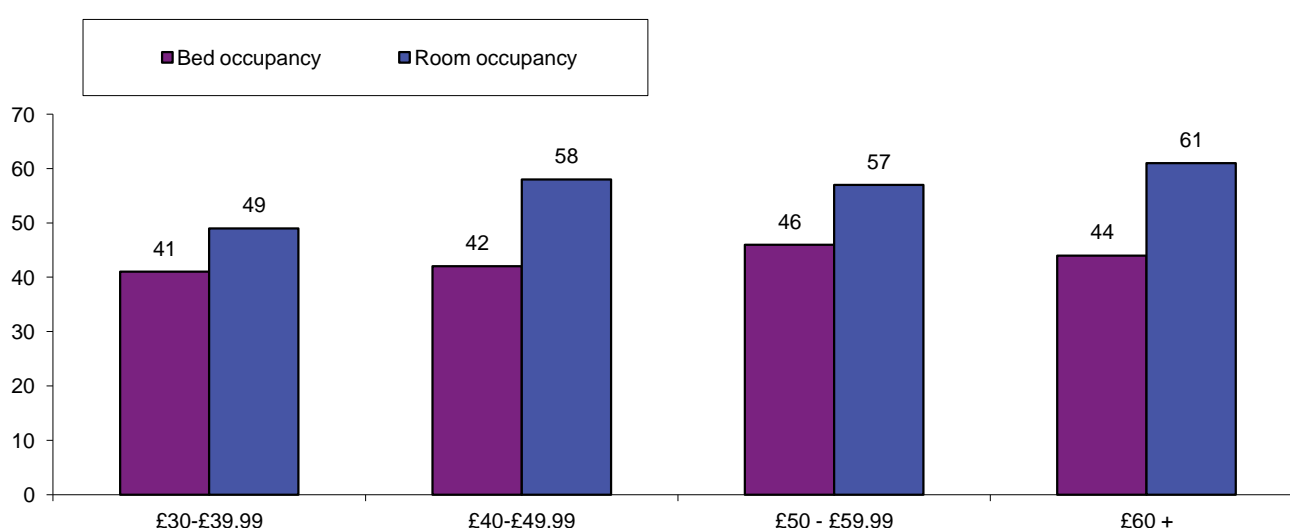
	Annual Average Room Occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
4-10 rooms	43	44	48	47	47	46	40	40	45	52	49
11-25 rooms	51	50	50	52	53	54	53	55	53	54	51
26-50 rooms	53	54	56	56	58	61	62	58	57	56	62
51-100 rooms	60	63	66	60	62	64	66	63	66	65	65
101+ rooms	68	68	68	69	71	68	67	69	68	63	64

While larger establishments recorded the highest annual average room occupancy rates in 2012, the largest increase was recorded for those with between 26 and 50 rooms, with the 2012 rate of 62% six percentage points higher than the rate recorded for these establishments in 2011 (56%) and equal to that recorded in 2008. Smaller establishments recorded decreases in their annual average room occupancy rates with the rate for those with 11-15 rooms falling from 54% to 51% between 2011 and 2012, while the rate for those with 4-10 rooms fell from 52% to 49%.

Occupancy by Tariff

The tariff figures used in the survey relate to the amount charged per person for a double or twin room, including breakfast. The monthly bed occupancy levels for each of the tariff categories used in the analysis are detailed in Appendix 1b and 1c of this section of the report.

Figure 3-9 below shows annual bed and room occupancy figures by tariff for 2012. There is no analysis for hotels with a tariff of less than £20 as there were no establishments in this tariff band in the sample in 2012.

Figure 3-9 - Annual Occupancy by Tariff of Hotel – 2012 (%)

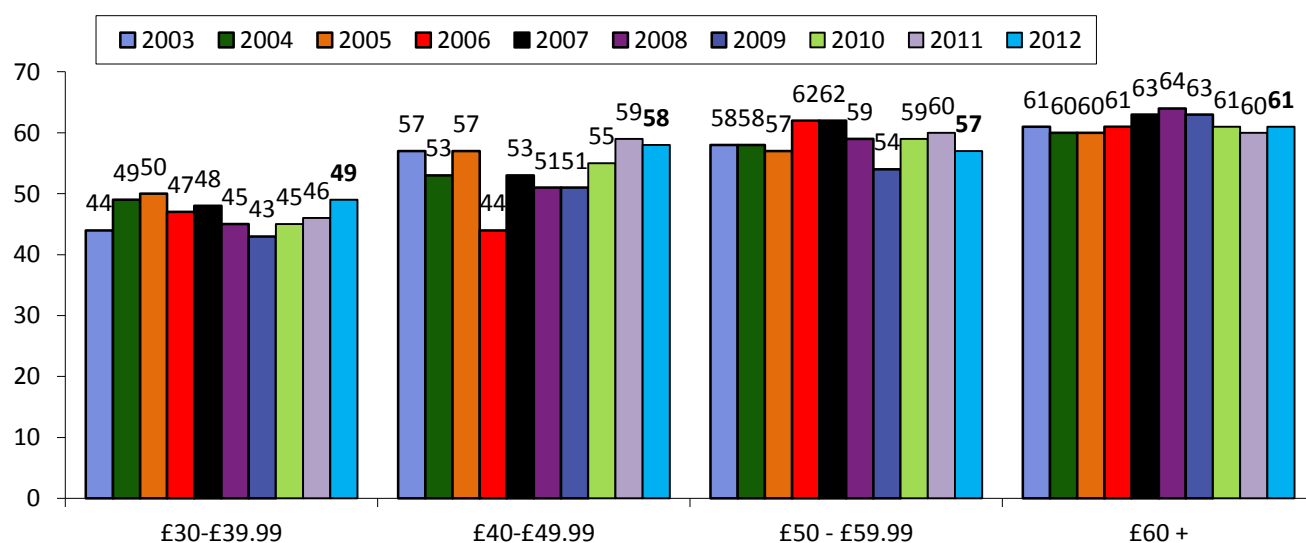
Once again, there was a generally positive relationship between the tariff charged and occupancy levels for hotels in 2012. Establishments charging £50 or more recorded the highest annual average bed

occupancy rates (46% for those charging £50-£59.99), a rate which is five percentage points higher than that recorded for establishments charging £30-£39.99. Establishments in the highest tariff band also recorded the highest annual average room occupancy rate, which at 61% was twelve percentage points higher than the rate recorded by establishments in the £30-£39.99 category. It is likely that hotels in the highest tariff band attracted a greater proportion of business guests making use of single occupancy rooms.

For hotels charging £40-£49.99 and those charging £60 or more, the annual average room occupancy rates recorded remained similar in 2012 to those recorded in 2011. Since 2009, the annual average room occupancy rate for establishments charging £30-£39.99 has risen year-on-year with the 2012 rate of 49% three percentage points higher than the 2011 rate of 46%. Those charging £50-£59.99 recorded a decrease in 2012 of three percentage points (60% to 57%), however, this rate remains higher than the 2009 rate of 54%.

Figure 3-10 below shows the annual average room occupancy rates by tariff for the period 2003 - 2012.

Figure 3-10 - Trends in Annual Room Occupancy Rates by Tariff of Hotel (%)

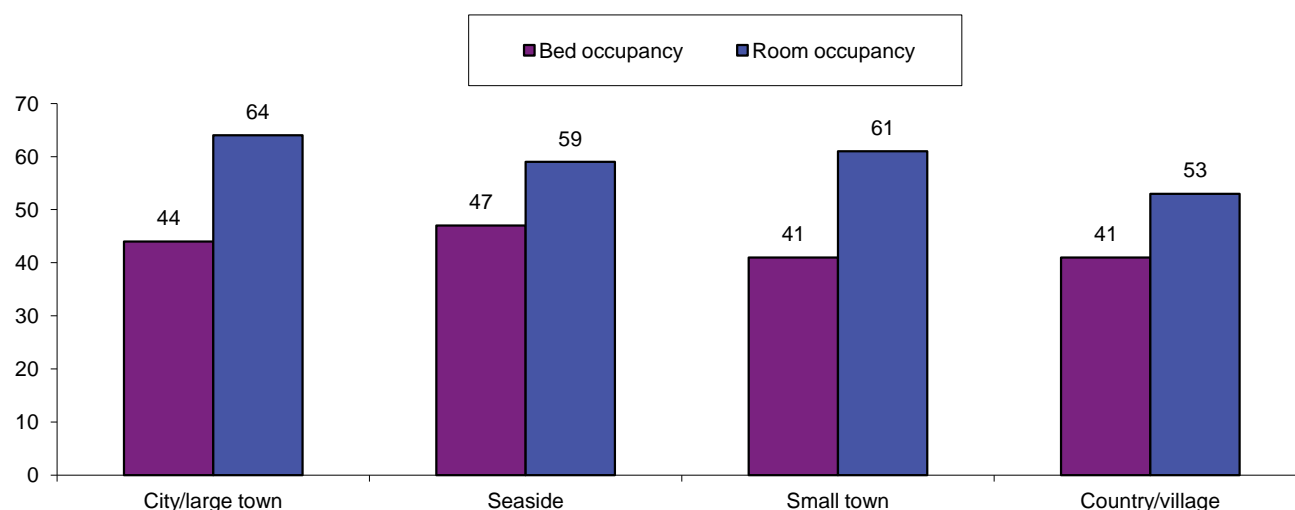


Occupancy by Location

Occupancy rates were analysed according to the location of the hotel - in a city/large town, a small town, at the seaside or in the countryside/village. The monthly bed and room occupancy levels for each of the location categories are detailed in Appendix 1b and 1c to this report.

The annual average bed and room occupancy figures by location are illustrated in Figure 3-11 below.

Figure 3-11- Annual Occupancy by Location of Hotel - 2012 (%)



As in previous years, establishments located in cities and large towns recorded the highest annual average room occupancy rate in 2012 (64%). As in 2011, it was establishments in seaside areas that recorded the highest annual average bed occupancy rate, with a rate of 47% recorded for these establishments in 2012. The lowest annual average bed occupancy rates were recorded for hotels in small towns and countryside locations (41%), while the lowest annual average room occupancy rate was recorded for hotels in countryside/village locations (53%). In 2011, the largest differentials between annual average bed and room occupancy rates were recorded for establishments in small towns and cities/large towns (twenty percentage points each).

Table 3-5 - Trends in Annual Room Occupancy Rates by Location of Hotel (%)

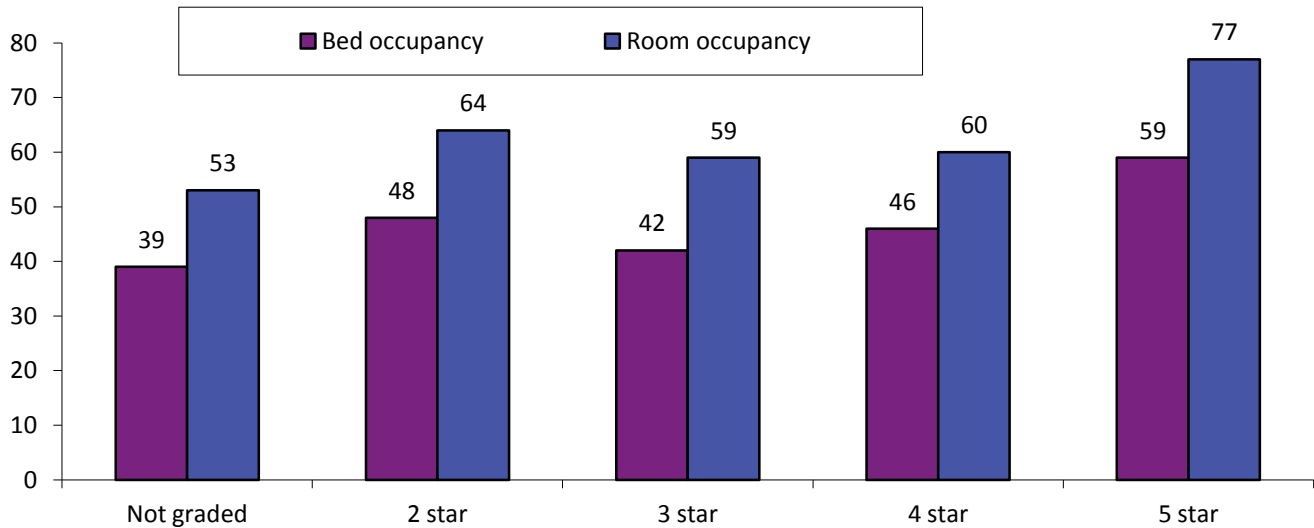
	Annual Room Occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
City/large town	69	72	69	67	71	71	71	69	66	62	64
Small town	52	53	54	56	57	57	53	55	61	59	61
Seaside	56	57	56	56	57	62	60	58	59	60	59
Countryside/village	49	52	53	53	53	52	53	52	53	55	53

Following decreases in 2011, the annual average room occupancy rates for establishments in cities/large towns and small towns rose in 2012 (62% to 64% and 59% to 61% respectively). On the other hand, establishments located in seaside and countryside/village locations recorded annual average room occupancy rates which were equal to those recorded for these areas in 2010 (59% and 53% respectively).

Occupancy by Grading

Since 1999, occupancy rates for hotels have been analysed according to their grading under the Star Grading Scheme administered by Visit Wales. There is no analysis for 1 star graded hotels as there was only one hotel with this grading in the sample.

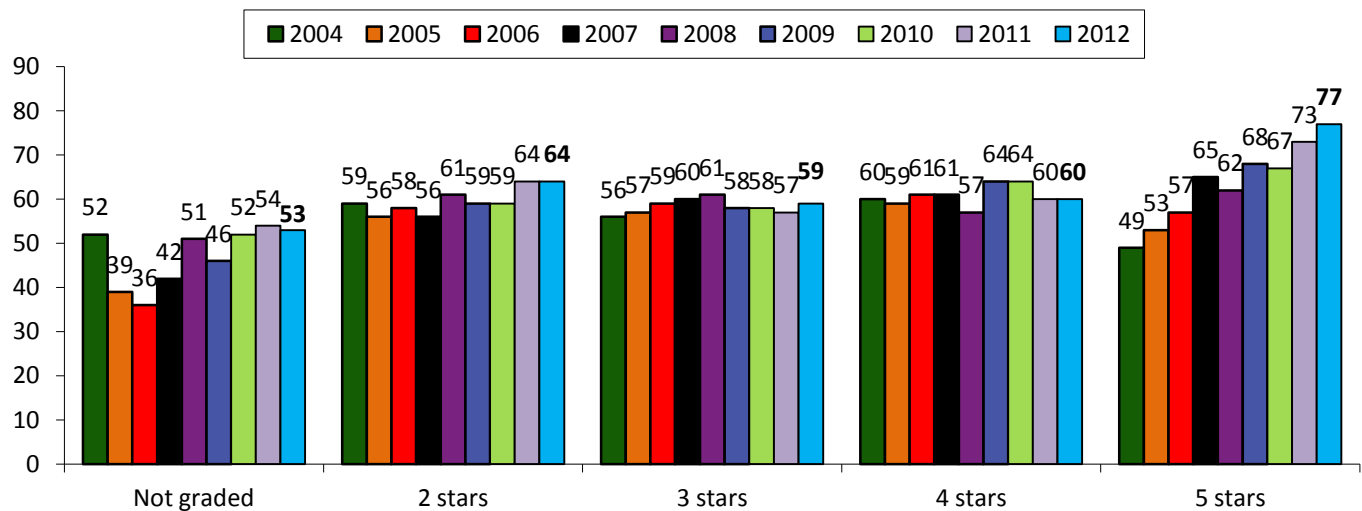
Figure 3-12 - Annual Occupancy by Grading of Hotel – 2012 (%)



As in a number of previous years, hotels not graded within the Visit Wales grading scheme recorded the lowest annual average occupancy rates, with an annual average bed occupancy rate of 39% and an annual average room occupancy rate of 53% recorded in 2012. Within the Visit Wales grading scheme, hotels with the highest star grading recorded the highest annual averages, with rates of 59% and 77% recorded for the annual bed and room occupancy rates respectively.

As illustrated in Figure 3-13 below, the 2012 annual average room occupancy rate for hotels with no star grading and those in the 2-4 star grading categories remained similar in 2012 to those recorded in the previous year. The annual average room occupancy rate for 5 star establishments, however, continued to rise in 2012 with a rate of 77% compared to 73% in 2011 and 67% in 2010. This is the highest annual average room occupancy rate recorded by these establishments since 2004. Monthly and annual average room occupancy figures for grading are presented in Appendix 1b and 1c.

Figure 3-13 - Trends in Annual Room Occupancy Rates by Grading of Hotel (%)



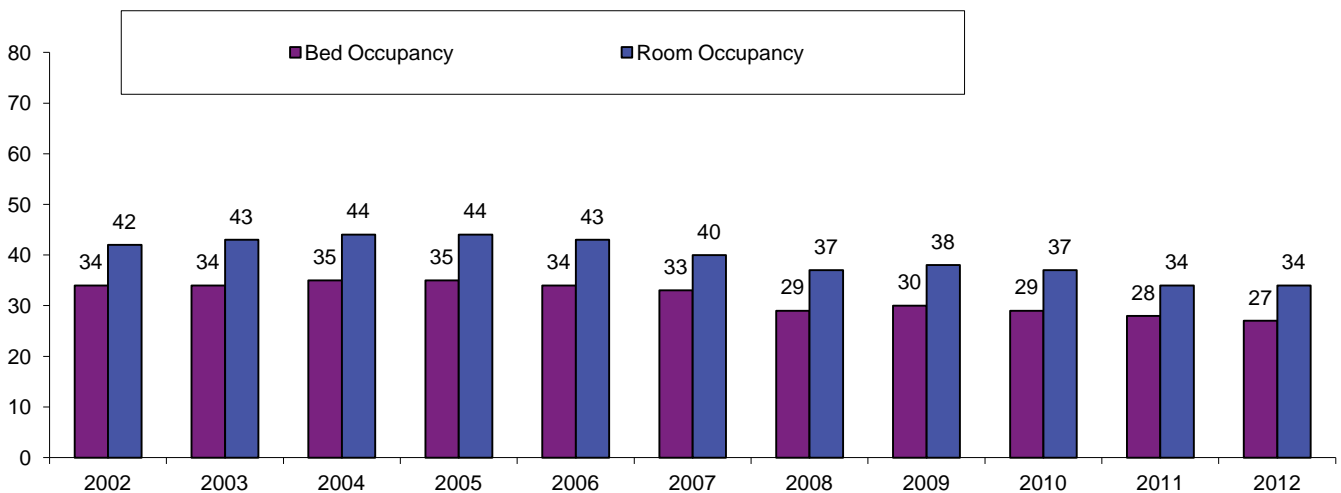
Guest Houses and Bed and Breakfasts

Section 4 of the report presents the monthly and annual average bed and room occupancy levels for guest houses and bed and breakfast establishments. Details of the survey methodology are available in a separate technical appendix.

Annual Average Bed and Room Occupancy

As shown in Figure 4-1 below, overall occupancy rates for Guest Houses and Bed and Breakfasts have been in general decline since the mid 2000s. The 2012 annual bed occupancy rate continued to fall slightly in 2012 to 27%, the lowest rate recorded since 2002. While the annual average room occupancy rate for 2012 was also at its lowest point since in 2002, it remained equal with the 2011 rate of 34%.

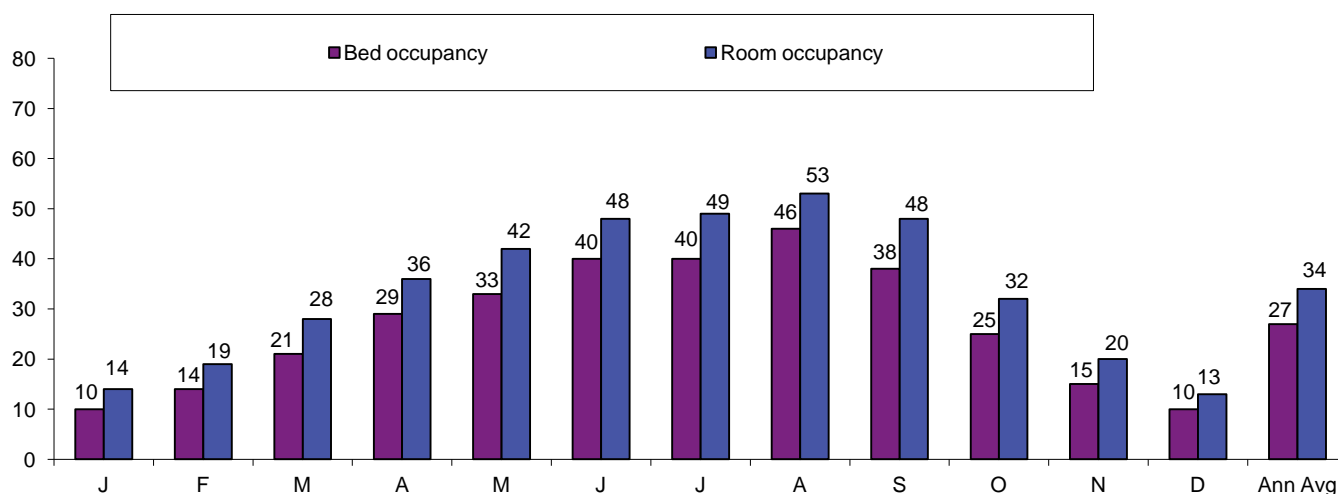
Figure 4-1 - Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the guest house and bed and breakfast sector in 2012 are presented in Figure 4-2 below.

Figure 4-2 - Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2012 (%)



As in previous years, the seasonal nature of the Guest House and Bed and Breakfast sector remained evident in 2012 with average bed occupancy rates at their highest during the main tourist season (May to September). Bed occupancy levels varied from 10% in January to a peak of 46% in August before decreasing to 10% in December. Room occupancy levels followed a similar pattern climbing from 14% in January to 53% in August before decreasing to 13% in December 2012.

As shown in Table 4-1 overleaf, average room occupancy rates were generally at a similar level or higher in 2012 than in 2011 for those months outside of the main tourist season. The average room occupancy recorded in March 2012 was four percentage points higher than the comparable rate for 2011 (28% and 24% respectively), while the rate for October rose from 29% to 32% over the same time period. The largest decrease in the average room occupancy rate was recorded in August where the rate fell from 59% in 2011 to 53% in 2012. The average room occupancy rate for August has shown a general decline for the Guest House and Bed and Breakfast sector since 2002 where a rate of 70% was recorded.

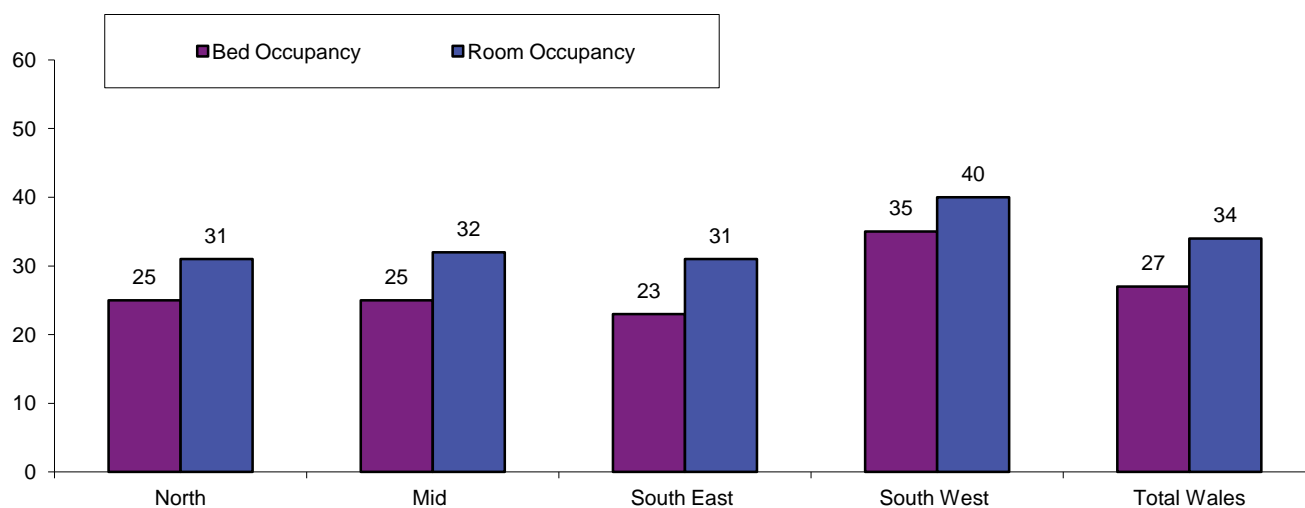
Trends in monthly bed occupancy rates are presented in Appendix 2a.

Table 4-1 - Guest Houses/B&Bs - Trends in Room Occupancy Rates - Monthly Averages (%)

	Room occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
January	22	21	22	26	17	19	18	17	15	13	14
February	26	27	27	29	27	27	26	25	24	19	19
March	34	30	29	36	28	29	30	27	27	24	28
April	33	45	44	40	42	40	34	38	38	39	36
May	45	52	49	49	52	49	46	45	42	41	42
June	57	50	57	56	57	50	45	48	50	49	48
July	60	61	64	63	65	54	54	54	53	50	49
August	70	72	73	72	71	66	59	59	57	59	53
September	54	54	56	59	56	51	47	51	50	45	48
October	41	39	43	41	43	39	38	39	39	29	32
November	29	30	28	24	28	27	25	25	25	19	20
December	24	24	25	20	27	19	21	21	18	13	13
Annual Average	42	43	44	44	43	40	37	38	37	34	34

Regional Occupancy Rates

Figure 4-3 below presents the annual average bed and room occupancy rates for guest houses and bed and breakfast establishments for each region of Wales in 2012. The monthly bed and room occupancy rates for each area are presented in Appendix 2b and 2c of this report.

Figure 4-3 - Guest Houses/B&Bs - Annual Average by Regions of Wales – 2012 (%)

The annual average bed and room occupancy rates were highest for the South West region in 2012 (35% and 40% respectively). Establishments in North Wales recorded an annual average bed occupancy rate of 25%, a rate equal to that recorded by establishments in Mid Wales and slightly higher than that recorded for those located in South East Wales (23%). The annual average room occupancy rate for South West Wales (40%) was nine percentage points higher than the rates recorded by establishments in North Wales and the South East (31% each).

Trends in Regional Occupancy Rates

Room occupancy levels in each region since 2000 are presented in Table 4-2 below.

Table 4-2 - Guest Houses/B&Bs - Trends in Room Occupancy Rates by Regions of Wales (%)

	Room occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Wales	38	40	42	44	43	41	35	39	39	35	31
Mid Wales	33	33	33	34	33	33	29	33	32	34	32
South East Wales	52	52	52	51	49	46	43	40	38	25	31
South West Wales	48	46	48	47	48	43	43	39	39	37	40
<i>Total Wales</i>	42	43	44	44	43	40	37	38	37	34	34

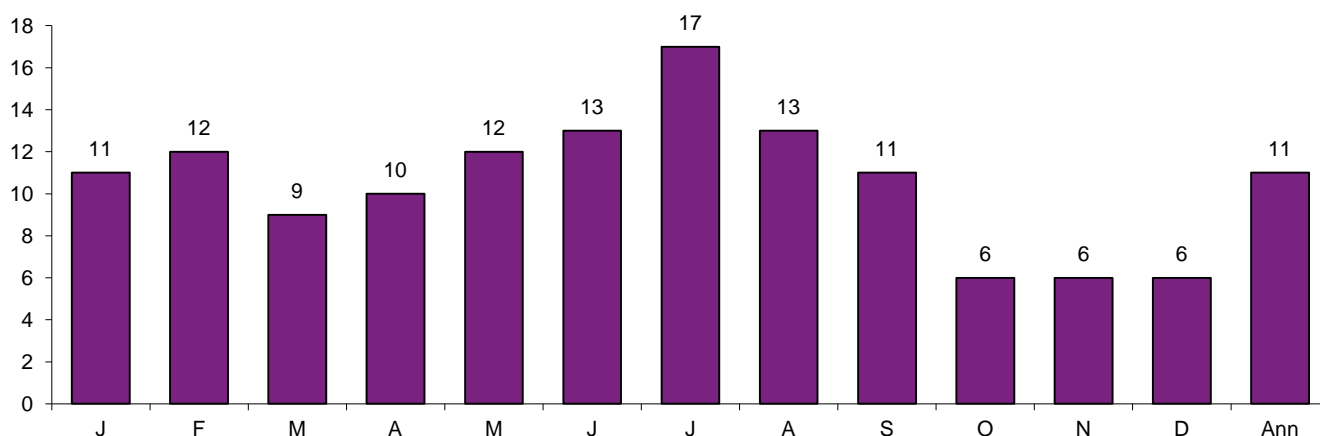
Increases in the annual average room occupancy rate were recorded for establishments located in the South of Wales, particularly in the South East region. In 2011, the annual average room occupancy rate for South East Wales (25%) was thirteen percentage points lower than in 2010 and was at its lowest rate since 2001. In 2012, the annual average room occupancy rate for this region increased by six percentage points to 31%. It should be borne in mind that the sample size for the South East region for business occupancy is low and that not all of those who did supply business occupancy data did so for every month, therefore, results should be treated with caution.

In contrast, decreases were recorded for establishments located in North Wales (35% in 2011 to 31% in 2012) and Mid Wales (34% in 2011 to 32% in 2012).

Percentage of Overseas Guests

As described in the previous section (Section 3), in 2008 there was a minor change in the way that data was collected for overseas guests. In 2008, the forms used to collect occupancy data were updated to make them more focussed and efficient. One of the changes affected the way information on overseas guests is collected. In previous years, establishments were asked to provide information on the number of new arrivals for each day (both UK and overseas) and the percentage of overseas guests based on the total number of arrivals was presented. This information is now not collected, so consequently, the proportion of overseas stays is presented as a percentage of overseas bed nights (based on total bed nights).

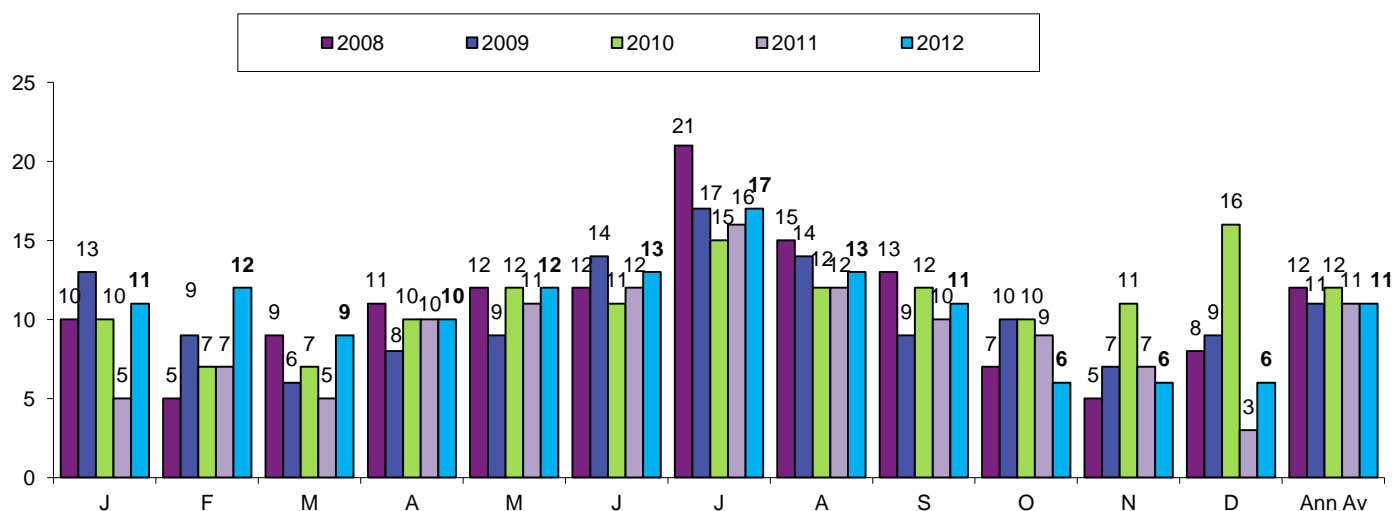
In light of these changes and to ensure consistency that overseas figures across years are compared based on the same methodological process, the amount of trended information presented for overseas guests has been reduced and the focus in this report is on the latest 2008 to 2012 results.

Figure 4-4 – Guest Houses/B&Bs - Percentage of Overseas Bednights - 2012 (%)

As in a number of previous years, the percentage of overseas guests was highest during the June to August period in 2012 with rates of 13% to 17% recorded, although 2012 did get off to a strong start in terms of the proportion of guests from outside the UK (11% in January and 12% in February 2012). The percentage of overseas guests fell from 11% in September 2012 to a steady rate of 6% for October, November and December 2012. The annual average overseas bednight rate for 2012 was 11%.

Trends in Percentage of Overseas Guests

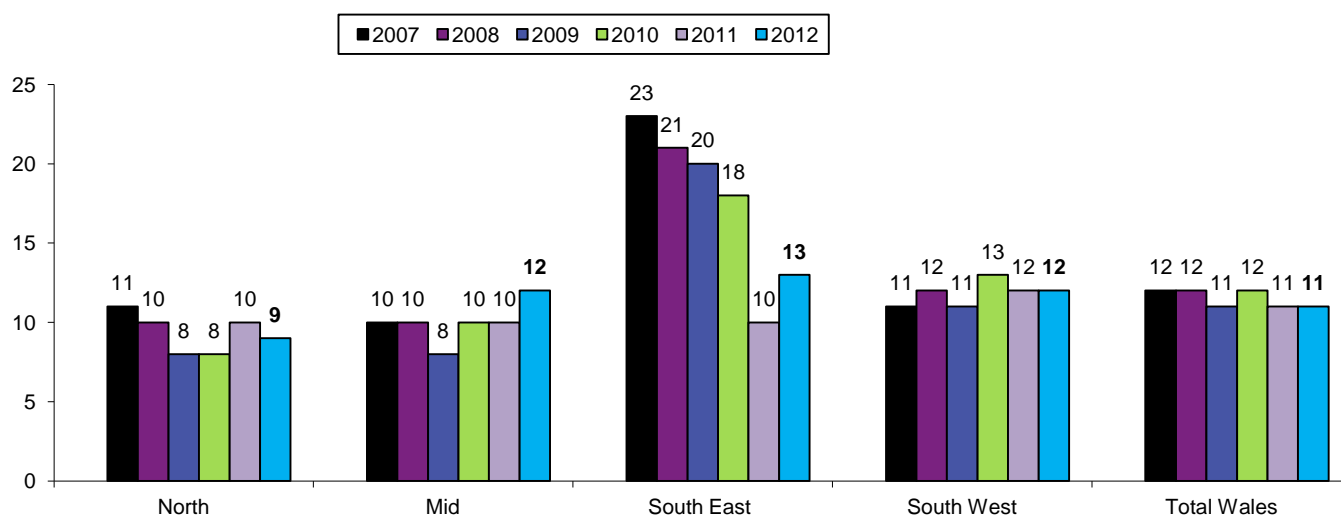
Across the five years shown in Figure 4-5 (below), the percentage of overseas guests has not varied significantly, remaining in the range 11% - 12%. However, there have been some considerable variations by month. The largest differences were recorded in January and February 2012, where the percentage of overseas guests rose by six percentage points and five percentage points respectively compared to the 2011 rates for these months. Over the years, rates have also been particularly variable for the months of November and December.

Figure 4-5 - Guest Houses/B&Bs - Trends in Percentage of Overseas Bednights

The South East (including Cardiff) has, in previous years, recorded much higher proportions of overseas occupants than the other regions in Wales. While the rates recorded across the four regions are more consistent in 2012 than for a number of previous years, the 2012 rate for South East Wales (13%) represents an increase for this region (from 10% in 2011) following three years of declining percentages of overseas guests.

The percentage of overseas guests rose by two percentage points for establishments in Mid Wales (10% to 12%), while the rate for North Wales fell slightly by one percentage point to 9% in 2012 and the rate for the South West remained level with 2011 at 12%.

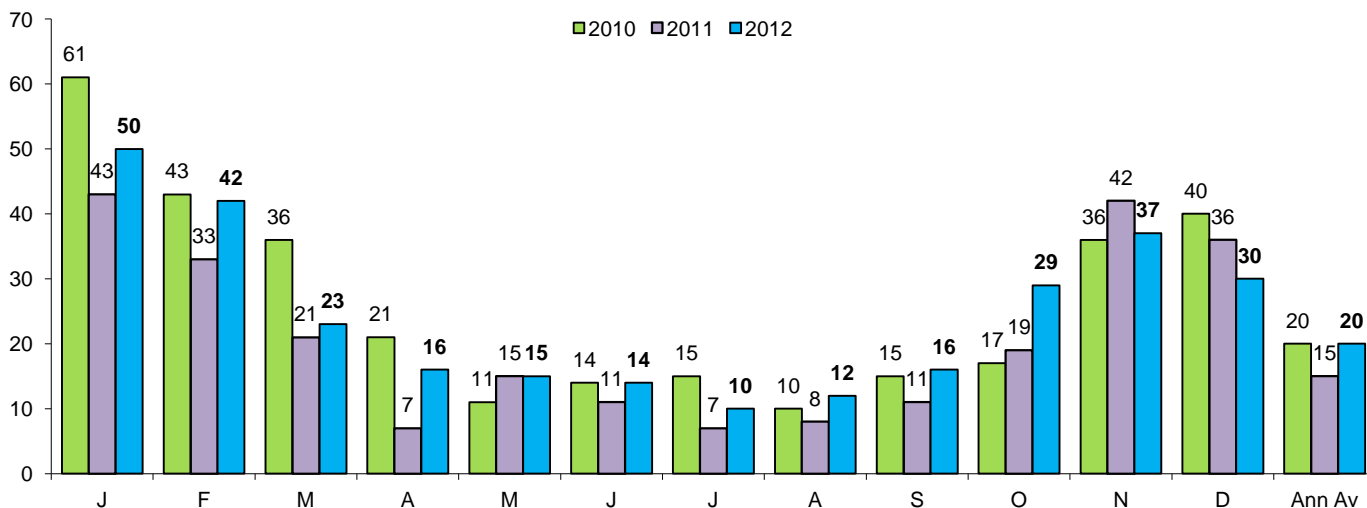
Figure 4-6 – Guest Houses/B&Bs - Percentage of Overseas Guests by Region 2007 – 2012 (%)



Percentage of Business Guests

As with hotels, guest house and bed and breakfast operators are asked to record the number of guests staying for business purposes. Please note that not all participants provide us with this information.

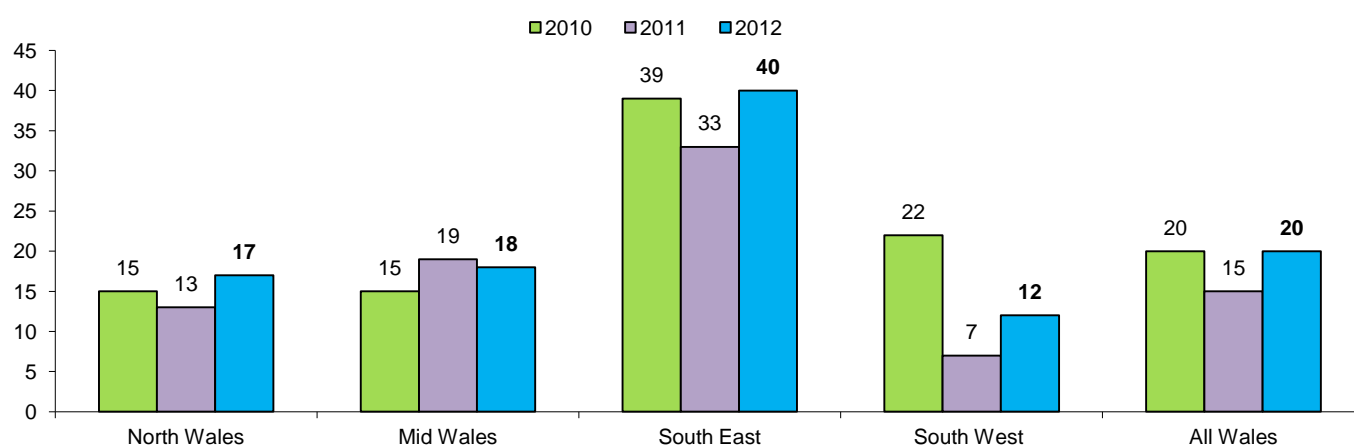
Figure 4-7 - Guest Houses/B&Bs - Percentage of Business Guests – 2010 - 2012 (%)



The annual average proportion of business guests in bed and breakfast and guest house establishments in 2012 was 20%, a five percentage point increase on the 2011 annual average of 15% and a return to the same rate as recorded in 2010. As in previous years, the highest proportions of business guests were recorded outside of the main summer season, particularly in January and February. Both of these months recorded an increase in the proportion of business guests when compared with the same months in 2012, with an increase from 43% in 2011 to 50% in 2012 for January and an increase of nine percentage points in February 2012 (33% to 42%).

As reported in previous years, a significantly higher proportion of business guests were recorded in the South East than in other regions (40% compared to 12% in South West Wales). Again, please note that not all participants supply this information, therefore, results are more variable than overall occupancy rates.

Figure 4-8 - Guest Houses/B&Bs – Annual Average Percentage of Business Guests by Region 2010– 2012 (%)



In 2012, it was establishments in the South that demonstrated the greatest variation when compared to 2011 with an increase of seven percentage points over this time period in the annual average percentage of business guests in South East Wales (33% to 40%) and an increase in the annual average proportion of business guests in the South West, which rose from 7% in 2011 to 12% in 2012 for this region. The rate for the North West also rose (from 13% in 2011 to 17% in 2012), while a slight decrease was recorded for establishments in Mid Wales (19% in 2011 to 18% in 2012). Again, please note that not all participants supply this information, therefore, results are more variable than overall occupancy rates.

Detailed Analysis of Main Results

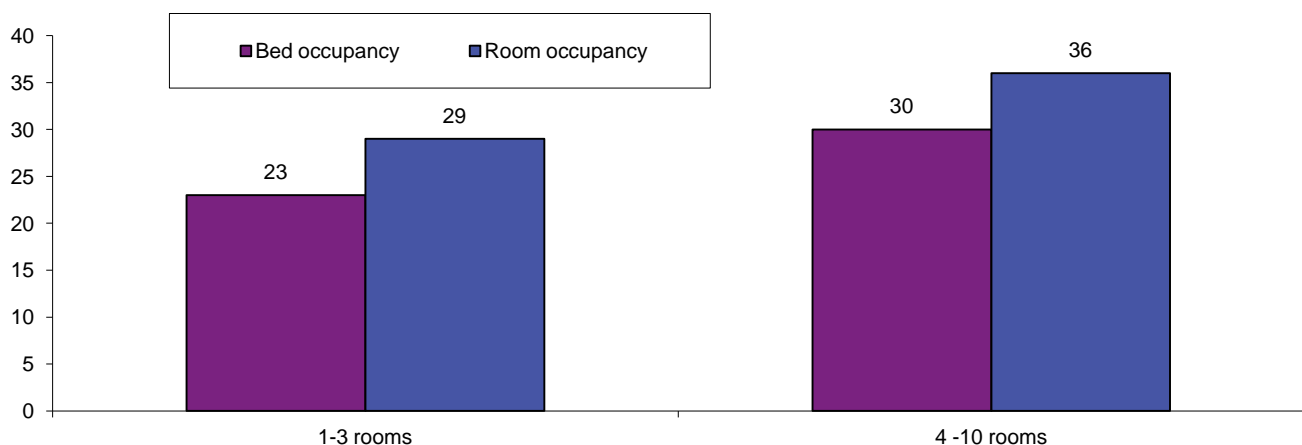
This section of the report looks in more detail at different types of guest house and bed and breakfast establishments which contributed to the survey and the impact, if any, these factors have on levels of bed and room occupancy.

Occupancy by Size of Guest House/Bed & Breakfast

Due to the small sample size in many of the larger size categories, occupancy rates are only presented for two categories of guest houses and bed and breakfasts: 1-3 rooms and 4-10 rooms.

The monthly average bed and room occupancy figures by size of guest house and bed and breakfast are presented in Appendix 2b and 2c.

Figure 4-9 - Annual Occupancy by Size of Guest House/Bed & Breakfast - 2012 (%)



As reported previously for this sector and for hotels, there would appear to be a positive relationship between occupancy rates and establishment size. Establishments with 4-10 rooms recorded annual average bed and room occupancy rates of 30% and 36% respectively compared to 23% and 29% respectively amongst those with 1-3 rooms. The higher occupancy amongst these establishments is likely to be a result of a number of factors including the fact that larger establishments are more likely to be open all year and they are also more likely to attract business guests.

Table 4-3 - Trends in Annual Room Occupancy Rates by Size of Guest House/Bed & Breakfast (%)

	Annual Average Room Occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
1-3 rooms	33	34	36	36	34	33	31	30	32	27	29
4-10 rooms	45	45	48	48	47	47	40	43	40	37	36

While the annual average room occupancy rate remains higher for larger establishments (4-10 rooms) than for those with fewer rooms in 2012, these establishments recorded a slight decrease in their annual average room occupancy rate (37% in 2011 to 36% in 2012). In contrast, the annual average room occupancy rate for those with between 1 and 3 rooms rose over the same time period from 27% to 29%.

Occupancy by Tariff

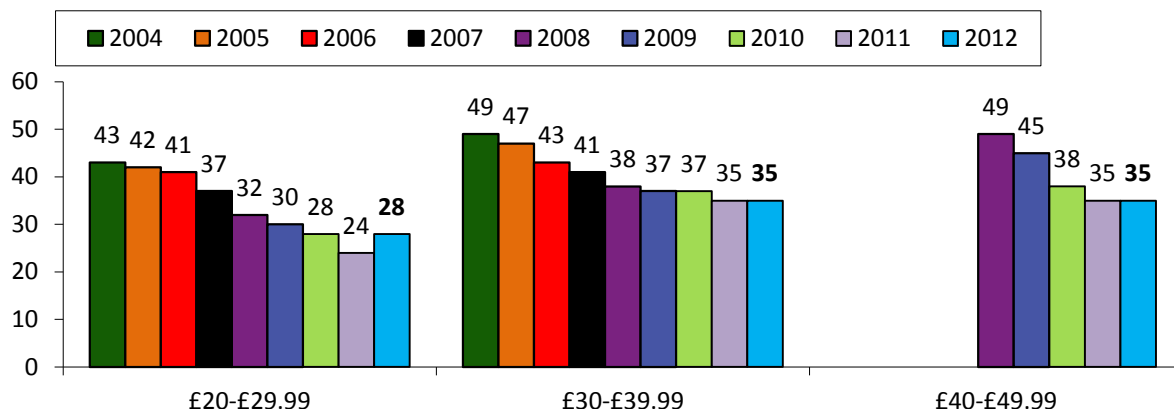
As in the hotel survey, the tariff figures used in the survey relate to the amount charged per person for a double or twin room, including breakfast. The monthly bed and room occupancy levels for each of the tariff categories used in the analysis are detailed in Appendix 2b and 2c of the report. It should be noted that due to the sample size, results are only presented for those establishments with a tariff of more than £20 and are not presented for those charging £50 or more.

Figure 4-10 below presents annual bed and room occupancy figures by tariff for 2012. While in previous years, there has appeared to be a positive correlation between tariff and occupancy levels, there was greater similarity in the rates recorded for the two higher tariff bands shown below in 2012. When compared to those charging £20-£29.99, the annual average bed occupancy rates for those charging over £30 were eight to nine percentage points higher, while their annual average room occupancy rates were seven percentage points higher in 2012.

Figure 4-10 - Annual Occupancy by Tariff of Guest House/B&B – 2012 (%)

Figure 4-11 below presents the annual average bed occupancy rates by tariff between 2004 and 2012. It should be highlighted that, as a result of changes in the tariff bands used in analysis, comparative figures prior to this are not available and due to sample sizes, results for some categories are not available for previous years.

Figure 4-11 - Trends in Annual Room Occupancy Rates by Tariff of Guest Houses/B&Bs (%)



Between 2011 and 2012, the annual average room occupancy rates for establishments charging £30-£39.99 and those charging £40-£49.99 remained level (both at 35%). Following year-on-year declining rates between 2006 and 2011, those charging £20-£29.99 recorded an increase of four percentage points in 2012, which brought the annual average room occupancy rate for these establishments to 28% in 2012.

The sample sizes for establishments charging under £20 and those charging £50 or more were too small to feature.

Occupancy by Location

Occupancy rates were analysed according to the location of the guest house and bed and breakfast establishment - in a city/large town, a small town, at the seaside or in the countryside/village locations. The monthly bed and room occupancy levels for each type of location are presented in Appendix 2b and 2c.

In 2010 and 2011, occupancy rates were highest in seaside areas, however, the rates recorded for establishments in these areas (30% annual average bed occupancy, 36% annual average room occupancy) were more level with those for other areas in 2012 than in previous years. Those in cities/large towns recorded annual average bed and room occupancy rates of 32% and 45% respectively, similar to those recorded for small towns (30% and 43% respectively) but higher than for establishments in country/village locations (26% and 31% respectively).

Figure 4-12 - Annual Occupancy by Location of Guest House/B&B – 2012 (%)

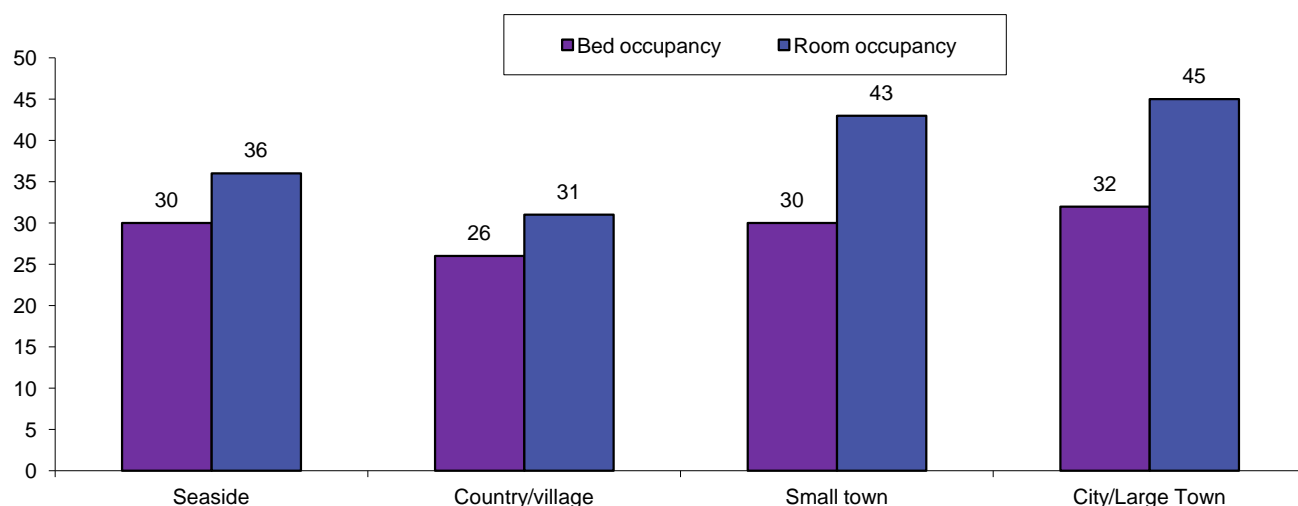


Table 4-4 - Trends in Annual Room Occupancy Rates by Location of Guest House/B&B (%)

	Annual Average Room Occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
City/ large town	67	70	63	64	67	64	57	54	42	*	45
Small town	43	39	38	42	41	40	38	40	37	44	43
Seaside	37	44	46	47	47	46	44	42	46	42	36
Country/village	41	40	41	41	40	36	33	33	34	30	31

* sample size too small to present data

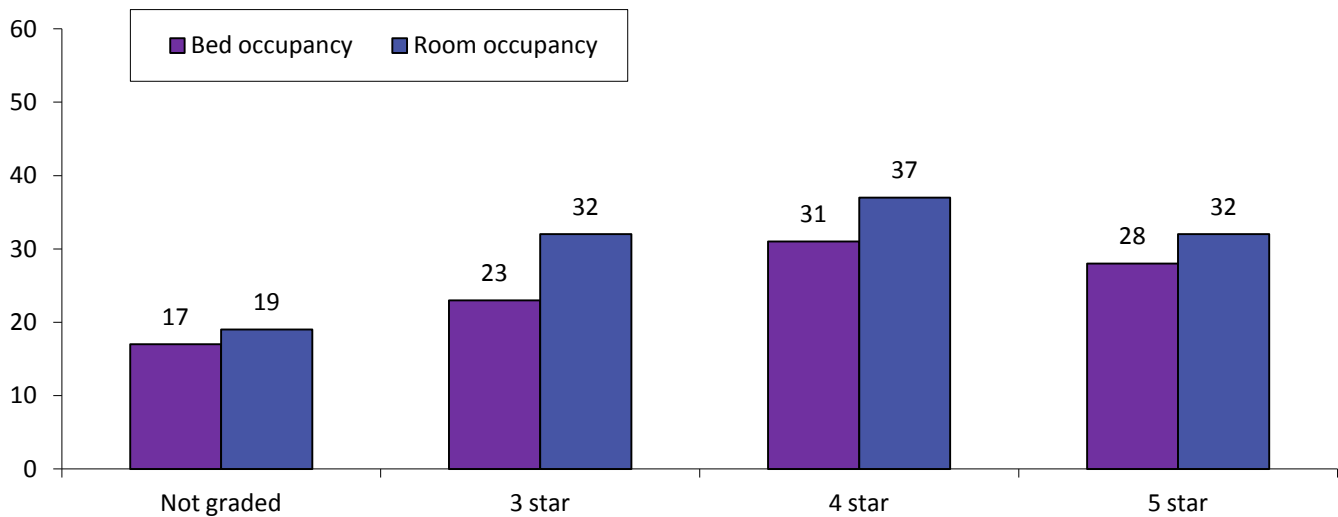
Following a decrease of four percentage points between 2010 and 2011, the annual average room occupancy rate for establishments in seaside areas decreased by a further six percentage points in 2012 to 36%. The rates recorded by those in small town and country/village locations remained similar in 2012 to 2011, while the city/large town rate for 2012 (45%) showed an increase on the 2010 figure of 42% (2011 sample too small for analysis).

Occupancy by Grading

As with hotels, occupancy rates for guest house and bed and breakfast establishments were analysed according to their grading under the Star Grading Scheme administered by Visit Wales

Figure 4-13 below presents annual bed and room occupancy figures by grading for 2012. Due to the small sample size of establishments with 1 and 2 stars, there is no analysis for these grading categories. Please note that not all establishment supply grading information and therefore, not all are included in this analysis.

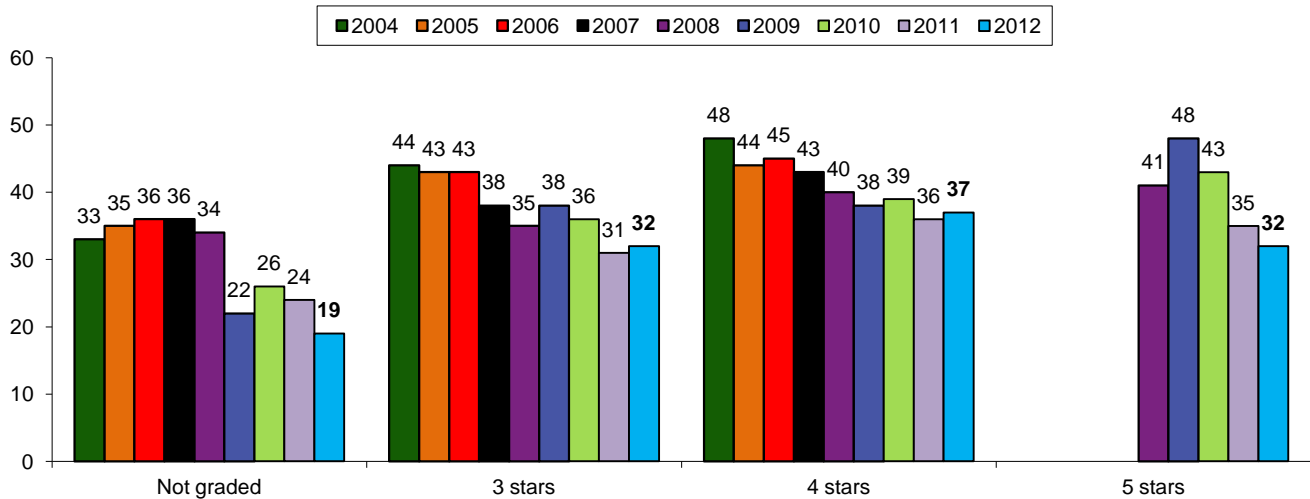
Figure 4-13 - Occupancy by Grading of Guest House/B&B - 2012 (%)



As shown in the chart above and as in previous years, there was generally a positive correlation between occupancy level and grading, with ungraded establishments recording the lowest annual average bed and room occupancy rates of seventeen and nineteen percentage points respectively. Establishments with a 5 star grading recorded a lower annual average bed occupancy rate than those with 4 stars (28% and 31% respectively), as well as a lower in annual average room occupancy rate (32% and 37% respectively).

Figure 4-14 below shows the trends in annual average room occupancy rates by grading. Please note data has not been presented for 1 and 2 star establishments and, for some previous years, for 5 star establishments due to limited sample sizes.

Figure 4-14 - Trends in Annual Room Occupancy Rates by Grading of Guest House/B&B (%)



Between 2011 and 2012, the largest decrease was recorded for ungraded establishments, with a rate of 24% in 2011 and 19% in 2012 for these establishments. Both those with 3 stars and those with a 4 star grading recorded slight increases in their annual average room occupancy rates (one percentage point each), while this rate continued to decrease for 5 star establishments in 2012 (35% in 2011 to 32% in 2012).

Monthly and annual average bed and room occupancy figures for the different grades are presented in Appendix 2b and 2c to the report.

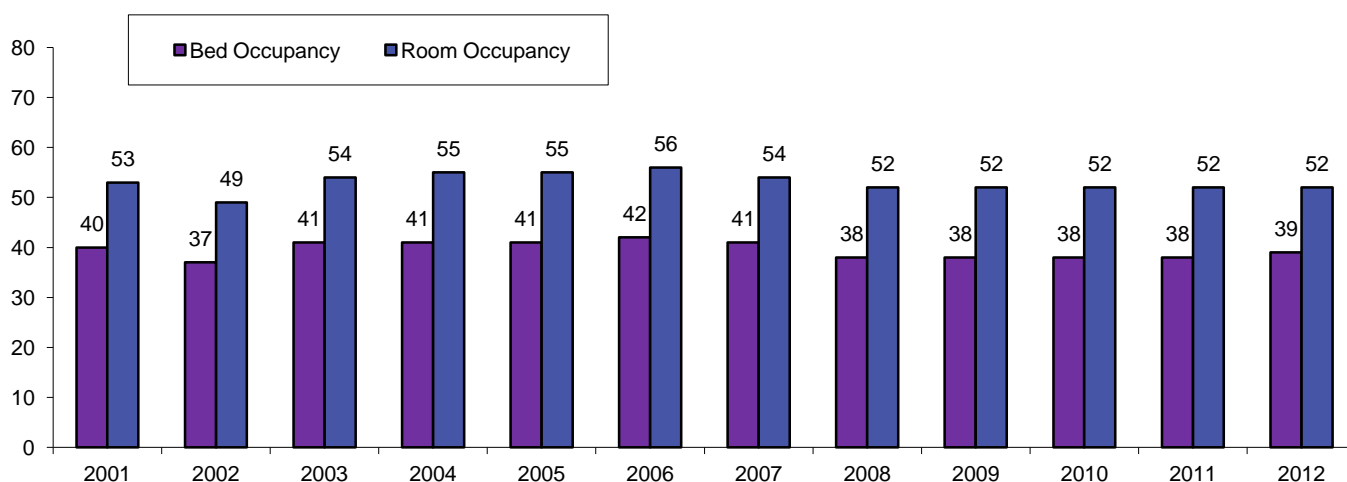
All Serviced Accommodation

Section 5 of the report presents the monthly and annual average bed and room occupancy levels for all the various types of serviced accommodation i.e. hotels, guest houses and bed and breakfast establishments.

Annual Average Bed and Room Occupancy

The annual average bed for all serviced accommodation remained consistent at 38% between 2008 and 2011, with a slight increase in 2012 bringing this rate to 39%. The annual average room occupancy rate was 52%, a rate which has been recorded consistently for all serviced accommodation since 2008.

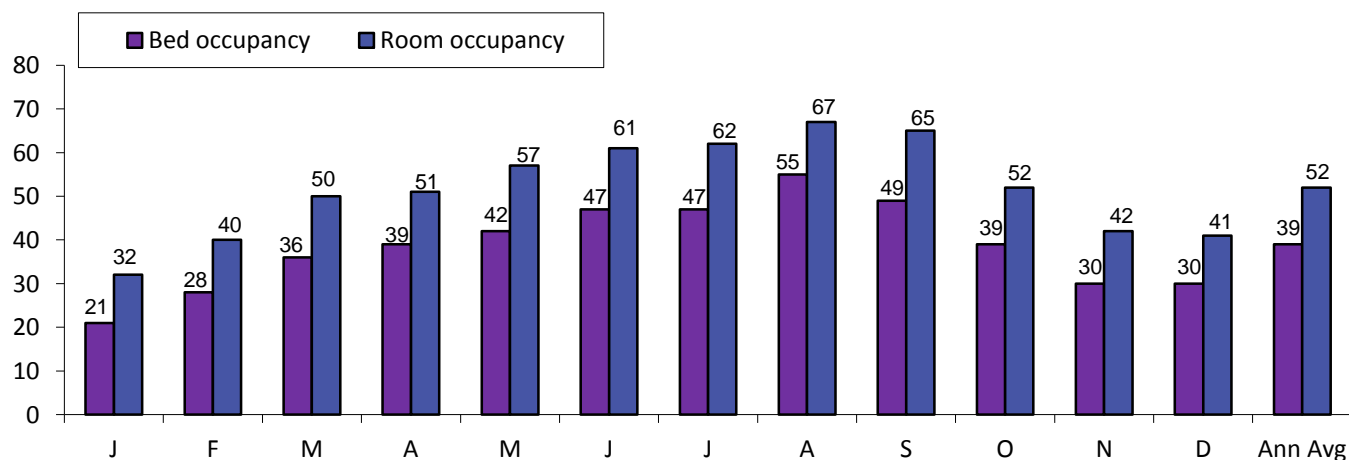
Figure 5-1 - Serviced Accommodation - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded for all serviced accommodation are presented in Figure 5-2 below.

Figure 5-2 – All Serviced Accommodation - Monthly Bed & Room Occupancy - 2012 (%)



As in previous years, seasonality is again evident in the monthly occupancy rates for all serviced accommodation. Between May and September, the average bed occupancy rate was in the range 42% - 55%, while the average room occupancy rate was in the range 57% - 67% during the same period.

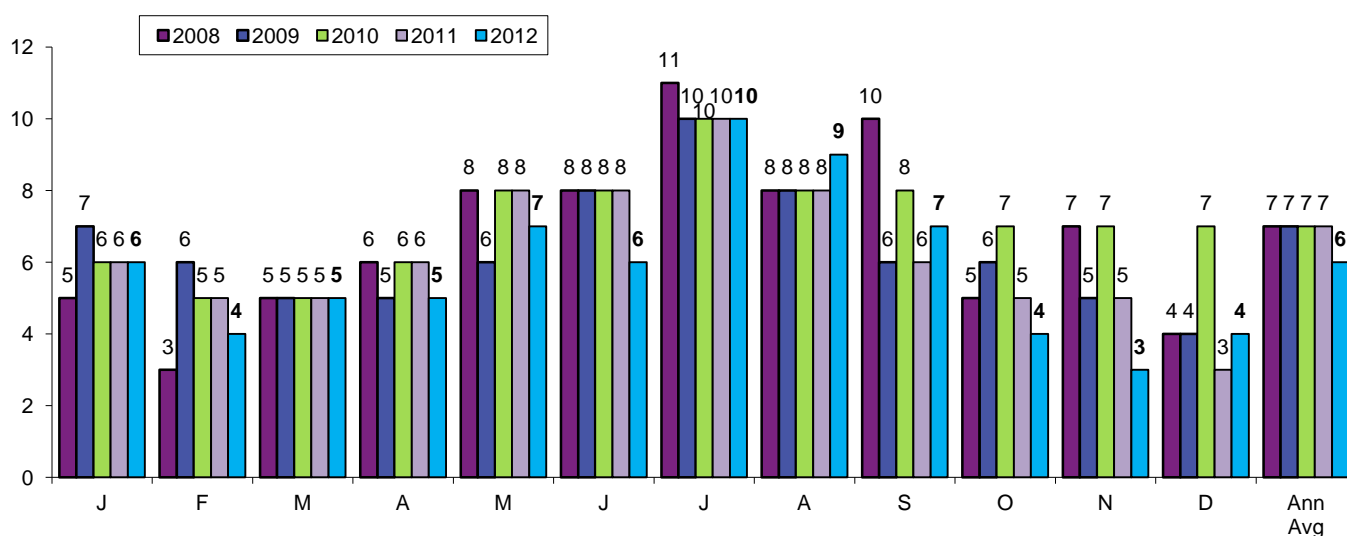
Percentage of Overseas Guests

Operators are asked to identify the number of guests staying in their establishment each night by nationality - UK and overseas - on their monthly occupancy form. It should be noted that not all respondents provide this information, therefore, results should be treated with caution.

From the start of 2008, arrivals information for both UK and Overseas guests was no longer collected, which has affected the way in which data for overseas guests has been calculated. Previously, establishments were asked to provide information on the number of new arrivals for each day (both UK and overseas) and we presented the percentage of overseas guests based on the total number of arrivals. This information is now not collected, so consequently, the proportion of overseas stays is presented as a percentage of bed nights (based on total bed nights).

In the light of these changes and to ensure consistency in the way that overseas figures across years are compared based on the same methodological process, the amount of trended information presented for overseas guests has been reduced and the focus in this report is on 2008 to 2012 results.

Figure 5-3 – All Serviced Accommodation - Percentage of Overseas Bednights – 2008 - 2012 (%)



The annual average percentage of overseas guests was consistently around 7% between 2008 and 2011, with a slight decrease in 2012 to 6%. There has been some variation when analysed by individual months over the past five years, particularly outside of the main tourist season. The percentage of overseas guests recorded in December 2008 and 2009 was 4%, a rate which rose to 7% in 2010 before falling to 3% in 2011 and rising again slightly to 4% in 2012.

Self Catering Cottages and Apartments

This section outlines the key occupancy results for self catering accommodation cottages and apartments and summarises the information obtained from a sample of verified independent operators and agencies offering self-catering cottages and apartments in Wales. The sample was designed to be largely representative of the range of furnished accommodation let through such operators. 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 to rent.

It should be noted that, in 2007, there was not a sufficient sample of self-catering agencies (letting agencies offering self-catering cottages and apartments in Wales) to run a separate analysis. For this reason, agency data is reported for 2008 onwards.

Monthly Unit Occupancy

Table 6-1 below presents annual unit occupancy rates for 2008 to 2012 across both independent and agency operators.

Table 6-1- Monthly Unit Occupancy – Cottages and Apartments ALL (%)

	Average Unit Occupancy				
	2008	2009	2010	2011	2012
January	24	20	17	29	32
February	37	43	34	42	41
March	39	41	37	38	45
April	48	51	49	63	55
May	54	55	53	65	48
June	57	56	60	65	65
July	64	67	67	71	68
August	81	75	81	85	81
September	62	61	60	72	64
October	50	45	31	55	50
November	25	22	22	31	36
December	36	48	35	32	38
<i>May – October average</i>	<i>61</i>	<i>60</i>	<i>59</i>	<i>69</i>	<i>63</i>
<i>Annual average</i>	<i>48</i>	<i>50</i>	<i>45</i>	<i>54</i>	<i>53</i>

The monthly unit occupancy rate for all properties in 2012, as in previous years, varies considerably throughout the year, reflecting the seasonal nature of this sector. An average monthly unit occupancy rate of 32% was recorded for January 2012, a figure which increased to 81% in August before falling to 36% in November and 38% in December. Between March and April 2012, the average monthly unit occupancy rate increased by ten percentage points from 45% to 55% respectively. This is a smaller increase than was recorded in 2011, likely due to the early timing of Easter and the impact of poorer weather conditions in April 2012.

Between 2010 and 2011, the May to October average unit occupancy rate rose by ten percentage points to 69%, influenced largely by higher occupancy rates in May and September 2011. The May to October average in 2012 (63%), while six percentage points lower than in 2011, remains higher than the comparable rates recorded between 2008 and 2010. Decreases were recorded for a number of months in the May to October period, particularly in May 2012 where a rate of 48% was recorded compared to 65% in 2011. This is due to a combination of sample changes and lower rates being recorded by a number of operators for this month in 2012 when compared to 2011.

The annual unit occupancy rate for 2012 was just one percentage point lower than the 2011 rate of 54% and the second highest annual average unit occupancy recorded since 2008. In light of the decrease in the May to October average in 2012, the similarity between the 2011 and 2012 annual averages can be seen to be influenced by increases outside of the main summer season. The largest of these increases were recorded in March (38% in 2011 to 45% in 2012) and December (32% in 2011 to 38% in 2012).

Table 6-2 below presents the annual 2012 occupancy rates for independent operators. As described earlier in the report, data from 2007 to 2011 has also been provided to illustrate trends over the last couple of years.

Table 6-2 - Monthly Unit Occupancy – Cottages and Apartments - Independent (%)

	Average Unit Occupancy					
	2007	2008	2009	2010	2011	2012
January	22	23	24	22	24	22
February	40	40	39	34	39	32
March	43	43	37	36	32	31
April	54	48	55	56	62	53
May	69	61	62	58	60	46
June	76	67	70	67	59	62
July	86	76	80	73	69	67
August	93	87	88	86	87	79
September	73	69	72	67	69	62
October	60	52	55	49	48	47
November	32	26	27	27	25	32
December	39	42	36	34	30	31
<i>May – October average</i>	<i>76</i>	<i>69</i>	<i>71</i>	<i>67</i>	<i>65</i>	<i>61</i>
<i>Annual average</i>	<i>57</i>	<i>53</i>	<i>54</i>	<i>51</i>	<i>50</i>	<i>49</i>

With the exception of 2009, the annual average unit occupancy rate for independent operators has fallen each year since 2007. The 2012 annual average was 49%, a decrease of one percentage point from the 2011 figure of 50%. A larger differential was recorded in the May to October average between 2011 and 2012 (65% and 61% respectively). When analysed by month, the largest decreases between 2011 and 2012 were recorded for the months of April (nine percentage points) and May (fourteen percentage points). It is likely that the early timing of the Easter Holiday period and poor weather has an impact on occupancy rates during those months, in addition to changes in the sample. However, the year ended more positively than in 2011, with the rate for November 2012 (32%) seven percentage points higher than that recorded for the same month in 2011 (25%). This represents a return to the same rate as that recorded in November 2007 (32%).

Table 6-3 overleaf presents annual occupancy figures for self-catering accommodation let by agencies for 2008 to 2012. As noted previously, occupancy data for these types of self-catering properties is not available for 2007.

Table 6-3 - Monthly Unit Occupancy – Cottages and Apartments - Agency (%)

Average Unit Occupancy					
	2008	2009	2010	2011	2012
January	24	16	13	34	41
February	36	45	35	46	48
March	35	44	39	44	57
April	47	49	44	64	58
May	51	52	49	69	52
June	51	43	56	70	70
July	59	54	64	73	69
August	78	63	78	84	83
September	58	51	56	75	68
October	44	36	21	62	56
November	23	17	20	40	42
December	29	57	38	34	50
<i>May – October average</i>	<i>57</i>	<i>50</i>	<i>54</i>	<i>72</i>	<i>66</i>
<i>Annual average</i>	<i>45</i>	<i>44</i>	<i>43</i>	<i>58</i>	<i>58</i>

In 2012, the average monthly unit occupancy rate for properties let by an agent ranged from 41% in January to 83% in August to 42% in November and 50% in December. While the highest monthly averages were recorded during the summer months of June, July and August (70%, 69% and 83% respectively), the largest increases between 2011 and 2012 were recorded outside of the main summer season with an increase of nine percentage points in January 2012 (34% to 41%) and fourteen in December (34% to 50%).

While the May to October seasonal unit occupancy average decreased by six percentage points between 2011 and 2012 (72% and 66% respectively), the 2012 rate is the second highest May to October average recorded since 2008. The annual average unit occupancy rate remained level with 2011 (58%), the highest rate recorded for agency let properties over the past five years.

Please note that the number of properties that data is submitted for by agency participants is variable and therefore, the monthly occupancy rates tend to show a reasonable degree of variation between years.

Regional Trends

This section of the report summarises the occupancy levels across the different regions of Wales for cottages and apartments. As there were no trended 2007 occupancy figures available for self-catering accommodation let by agencies, we have presented data for 2008 onwards, while occupancy figures for independent operators are presented from 2007 onwards.

Table 6-4 - Monthly Unit Occupancy – North Wales – Independent (%)

	Average Unit Occupancy					
	2007	2008	2009	2010	2011	2012
January	25	25	31	23	31	25
February	45	42	40	44	42	36
March	42	45	38	39	31	38
April	59	47	53	61	62	57
May	73	61	71	68	68	58
June	83	70	74	73	62	69
July	90	76	85	78	72	65
August	92	85	88	86	87	81
September	77	72	82	73	75	61
October	63	52	68	57	55	47
November	37	25	38	31	24	34
December	40	38	38	36	30	28
<i>May – October average</i>	<i>80</i>	<i>69</i>	<i>78</i>	<i>72</i>	<i>70</i>	<i>64</i>
<i>Annual average</i>	<i>61</i>	<i>53</i>	<i>59</i>	<i>56</i>	<i>53</i>	<i>49</i>

Table 6-5 - Monthly Unit Occupancy – North Wales – 2008 - 2012 ALL (%)

	Average Unit Occupancy				
	2008	2009	2010	2011	2012
January	21	29	23	33	35
February	41	38	44	45	40
March	36	38	42	42	45
April	49	58	61	63	58
May	49	66	67	69	53
June	56	70	69	69	69
July	59	81	74	73	68
August	68	89	85	85	83
September	56	77	75	75	68
October	48	60	58	60	55
November	23	38	36	35	41
December	32	44	37	33	47
<i>May – October average</i>	<i>56</i>	<i>74</i>	<i>71</i>	<i>72</i>	<i>66</i>
<i>Annual average</i>	<i>45</i>	<i>57</i>	<i>56</i>	<i>57</i>	<i>56</i>

The annual average unit occupancy rate for all properties in North Wales has been in the range 56%-57% since 2009, with the 2012 rate of 56% a slight decrease on the 2011 rate (57%). The May to October average has shown more variation over the years, with decreases recorded for this rate each year since 2009. The 2012 May to October average unit occupancy rate of 66% is six percentage points lower than the 2011 rate of 72%. The largest increases recorded for individual months between 2011 and 2012 were recorded in November (six percentage points) and December (fourteen percentage points).

Please note that the number of properties that data is submitted for is variable and therefore, the monthly occupancy rates have shown a reasonable degree of variation between years.

Table 6-6 - Monthly Unit Occupancy – Mid Wales – Independent (%)

	Average Unit Occupancy					
	2007	2008	2009	2010	2011	2012
January	24	25	16	16	18	18
February	41	40	40	27	38	33
March	42	41	40	38	28	31
April	48	53	59	60	65	55
May	59	66	64	58	56	46
June	70	63	70	66	61	63
July	85	78	81	74	70	74
August	93	89	91	88	91	86
September	73	68	70	66	71	66
October	61	54	54	44	51	46
November	24	27	23	27	28	29
December	35	46	31	37	34	32
<i>May – October average</i>	<i>74</i>	<i>70</i>	<i>72</i>	<i>66</i>	<i>67</i>	<i>64</i>
<i>Annual average</i>	<i>55</i>	<i>54</i>	<i>53</i>	<i>50</i>	<i>51</i>	<i>48</i>

Table 6-7 - Monthly Unit Occupancy – Mid Wales – 2008 - 2012 ALL (%)

	Average Unit Occupancy				
	2008	2009	2010	2011	2012
January	6	12	12	18	18
February	18	51	32	38	32
March	32	47	38	28	31
April	46	38	44	65	55
May	63	38	47	56	46
June	65	39	55	61	66
July	61	50	64	70	73
August	84	60	78	91	86
September	68	46	52	71	65
October	54	33	16	51	47
November	27	13	18	28	30
December	46	54	37	34	32
<i>May – October average</i>	<i>66</i>	<i>44</i>	<i>52</i>	<i>67</i>	<i>64</i>
<i>Annual average</i>	<i>48</i>	<i>43</i>	<i>41</i>	<i>51</i>	<i>49</i>

As in previous years, occupancy rates in Mid Wales for all properties varied considerably across the year in 2012. The January 2011 rate was 18%, a figure which rose to 86% in August before decreasing to 30% in November 2012. The May to October average for 2012 was 64%, which represents a three percentage point decrease on 2011 rate of 67% but remains higher than the rates recorded in 2009 (44%) and 2010 (52%). There was a smaller decrease recorded in the annual average unit occupancy rate, which at 49% is two percentage points lower than in 2011 (51%) but is the second highest annual average recorded for self-catering properties Mid Wales since 2008.

By month, decreases of ten percentage points were recorded in April and May 2012 when compared to the same months in 2011 (55% v 65% and 46% v 56% respectively). It is likely that these decreases were influenced by the early timing of the East Holiday period and poor weather.

Please note that the number of properties that data is submitted for is variable and therefore, the monthly occupancy rates have shown a reasonable degree of variation between years.

Table 6-8 - Monthly Unit Occupancy – South East Wales – Independent (%)

	Average Unit Occupancy					
	2007	2008	2009	2010	2011	2012
January	38	25	28	54	37	32
February	51	55	28	52	45	33
March	47	43	28	32	36	32
April	50	57	54	53	54	52
May	66	64	46	53	56	53
June	69	63	68	58	56	63
July	76	77	83	67	67	74
August	87	89	83	75	74	73
September	58	75	67	54	57	66
October	63	73	58	57	45	70
November	54	49	38	40	32	46
December	64	63	59	57	38	42
<i>May – October average</i>	-	73	67	61	59	67
<i>Annual average</i>	60	61	53	55	50	56

Table 6-9- Monthly Unit Occupancy – South East Wales – 2008 - 2012 ALL (%)

	Average Unit Occupancy				
	2008	2009	2010	2011	2012
January	25	28	54	37	43
February	56	28	52	45	54
March	47	29	32	36	66
April	57	54	53	54	52
May	64	46	53	56	53
June	63	68	58	56	63
July	77	83	67	67	74
August	89	83	75	74	73
September	75	67	54	57	66
October	73	58	57	45	70
November	49	38	40	32	46
December	63	59	57	38	42
<i>May – October average</i>	73	67	61	59	67
<i>Annual average</i>	61	53	55	50	57

2012 began with an average unit occupancy rate of 43% in January for all properties in South East Wales, a rate which rose to 74% in July before falling to 42% in December. Rates for the South East have tended to be variable over the years, particularly during the months of January and February.

Between 2008 and 2011, the May to October average for South East Wales fell from 73% to 59%, with an increase of eight percentage points in 2012 returning this rate to 67% (also recorded in 2009).

It should be noted that no data was available for self-catering properties let by agencies in the South East region between April and December 2012, which is reflected in the occupancy rates recorded for January to March 2012.

Table 6-10- Monthly Unit Occupancy – South West Wales – Independent (%)

	Average Unit Occupancy					
	2007	2008	2009	2010	2011	2012
January	13	16	20	16	17	22
February	33	32	40	25	34	28
March	43	40	36	32	34	29
April	51	44	56	50	61	50
May	70	58	53	52	59	40
June	73	64	67	64	58	60
July	84	74	73	70	66	61
August	96	90	86	87	87	77
September	70	64	65	65	67	58
October	55	44	44	45	41	39
November	28	22	17	20	21	25
December	34	39	29	24	24	23
<i>May – October average</i>	-	66	65	64	63	56
<i>Annual average</i>	54	49	49	46	48	46

Occupancy levels in South West Wales again demonstrated the seasonality of the sector, ranging from 22% in January to 77% in August before decreasing to 23% in December. Previously the May to October average for this region demonstrated a fair degree of consistency (in the range 63% - 65% between 2008 and 2011), however, this rate fell to 56% in 2012. The annual average unit occupancy rate for this region in 2012 was 46%, a rate which was equal to 2010 but two percentage points lower than the 2011 rate of 48%.

As recorded for other regions in Wales, the largest decreases between 2011 and 2012 for operators in South West Wales were recorded in April (eleven percentage points) and May (nineteen percentage points). It is likely that these decreases were influenced by the early timing of the East Holiday period and poor weather, as well as sample variations.

It should be noted that no data was available for self-catering properties let by agencies in the South West region during 2012. In addition, the number of properties that data is submitted for is variable and therefore, the monthly occupancy rates have shown a reasonable degree of variation between years.

Occupancy by Location – Coastal v Inland

Occupancy data was analysed for properties in coastal and inland locations. Table 6-9 below illustrates occupancy rates for independent operators along with trended 2007 to 2011 data.

Table 6-11- Monthly Unit Occupancy by Location - Independent (%)

	Coastal locations Unit Occupancy (%)						Inland locations Unit Occupancy (%)					
	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
January	20	21	25	23	28	21	24	22	19	22	21	23
February	40	44	44	32	44	22	40	40	35	30	36	35
March	47	47	40	39	39	29	37	41	33	33	29	32
April	60	55	51	58	66	51	45	50	58	52	59	54
May	74	67	70	60	71	44	61	63	55	52	56	47
June	83	72	76	72	70	67	66	64	67	61	55	62
July	90	78	85	81	78	65	79	77	76	68	64	68
August	95	93	95	93	92	78	91	89	86	84	84	80
September	78	72	79	77	77	60	65	69	66	60	65	63
October	62	49	58	58	55	31	56	55	49	43	45	52
November	29	23	21	25	25	24	38	29	24	25	25	34
December	36	42	34	29	29	21	44	44	36	34	30	32
Annual Average	60	55	57	54	56	45	54	54	50	47	47	50

Prior to 2012, units in coastal areas recorded a higher annual average unit occupancy rate than inland properties. However, in 2012, inland properties recorded the higher annual average, which at 50% is three percentage points higher than that recorded for these properties in 2010 and 2011 (47% each). Inland properties had a stronger end to the year in 2012 than in the previous year, with the 2012 monthly unit occupancy averages for October and November seven and nine percentage points higher respectively than the comparable figures for 2011.

Units in coastal areas, however, recorded a decrease of eleven percentage points in their annual average unit occupancy rate in 2012 (45% compared to 56% in 2011), with decreases recorded for most months in 2012 when compared to 2011. The rate for December has been in decline for a number of years, falling from 42% in 2008 to 21% in 2012.

Please note that the number of properties that data is submitted for is variable and therefore, the monthly occupancy rates have shown a reasonable degree of variation between years. However, a number of operators have recorded noticeably lower occupancy rates in 2012, which is reflected in the figures presented.

Table 6-12- Monthly Unit Occupancy by Location - ALL (%)

	Coastal locations Unit Occupancy (%)					Inland locations Unit Occupancy (%)				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
January	21	24	23	28	39	24	21	23	24	28
February	44	43	33	44	46	41	36	34	41	38
March	47	40	39	39	54	42	35	36	36	39
April	55	51	58	66	57	49	60	55	61	54
May	66	70	60	71	50	60	60	56	63	48
June	72	76	72	70	71	64	67	62	62	64
July	78	85	81	78	71	74	76	69	70	67
August	93	95	93	92	83	86	87	83	82	80
September	72	79	77	77	68	67	69	63	67	63
October	49	58	58	55	48	50	50	45	47	52
November	23	21	25	25	33	24	28	28	29	37
December	42	34	29	29	38	39	41	35	31	38
Annual Average	55	56	54	56	55	52	52	49	51	52

When all properties are analysed together, the annual average for those in coastal areas was higher than that recorded for inland properties (55% and 52% respectively in 2012). The largest differential between coastal and inland properties was recorded in March, with rates of 54% and 39% respectively. This is likely to be reflective of the fact that fewer coastal properties were open during March, with a number of properties closed for all or part of the month.

Inland properties recorded an increase of eight percentage points in their average unit occupancy rate for November in 2012 (29% in 2011, 37% in 2012). It is important to bear in mind that, in addition to the higher rates recorded for this month in 2012, a number properties were not open for the whole month and that the occupancy rate is only based on the periods when properties were available for let.

Please note that the number of properties that data is submitted for is variable and therefore, the monthly occupancy rates have shown a reasonable degree of variation between years. However, a number of operators have recorded noticeably lower occupancy rates in 2012, which is reflected in the figures presented.

Occupancy by Tariff

The annual average unit occupancy rates by tariff are presented in Table 6-11 below. Monthly unit occupancy rates for tariff analysed by independent/agency operators are detailed in Appendix 3a of the report.

Properties in all of the tariff bands recorded similar annual average unit occupancy rates in 2011 of 49% - 50%. However, in 2012, a greater degree of variation was recorded and a clearer relationship between tariff and occupancy rates can be seen. Those charging £500-£799.99 recorded an annual average unit occupancy rate of 54% compared to an average of 42% for those charging less than £300.

Table 6-13- Average Monthly Unit Occupancy by Tariff (%)

	Tariff			
	Unit Occupancy (%)			
	<£299.99	£300 -£499.99	£500 - £799.99	£800+
January	27	17	19	*
February	36	33	30	*
March	35	37	20	*
April	60	52	63	*
May	50	51	38	*
June	79	58	75	70
July	*	69	69	64
August	71	80	84	91
September	67	71	62	*
October	49	51	52	*
November	33	32	26	*
December	30	31	25	36
Annual Average	42	49	54	*

*=sample <5

The clearest correlation between tariff and occupancy rates can be seen for August 2012, where those charging £299.99 or less recorded an average of 71% compared to 80% for those in the £300-£499.99 bracket and 84% for those charging between £500 and £799.99. Properties in the lowest tariff band tended to recorded similar or higher average unit occupancy rates outside of the main summer season, particularly in January 2012 where a rate of 27% was recorded for those charging less than £300 compared to 17% for those charging £300-£499.99 and 19% for those charging £500-£799.99.

Please note that the tariff charged for a property can vary throughout the year, meaning that there is movement between the tariff bands, particularly during the summer months when higher rates are often introduced.

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Table 6-12 below shows the annual average unit occupancy rates by grade.

With the exception of 2 star properties, there was a general relationship between star grading and occupancy rates. Those with 3 star grading recorded an annual average occupancy rate of 44% compared to 53% for those with 4 stars and 54% amongst those with a 5 star grading. Properties with no grading recorded an annual average of 57%, while those with a 2 star grading recorded an annual average of 47%.

Please note that no properties in this year's survey had a one star grading. Also, the sample size for 2 star properties is smaller than for the other categories therefore these results should be treated with a degree of caution. In addition, a higher proportion of properties in the sample had a star grading in 2012.

Table 6-14 - Average Monthly Unit Occupancy by Grading (%)

	Star Grading				
	Unit Occupancy (%)				
	2 Star	3 Star	4 Star	5 Star	Not graded
January	25	33	26	19	42
February	54	30	31	30	57
March	45	24	34	40	71
April	52	50	56	60	62
May	45	38	52	52	59
June	66	56	68	74	65
July	70	58	69	78	68
August	75	73	82	91	68
September	50	50	68	81	65
October	44	35	54	62	43
November	33	28	37	33	41
December	34	34	35	26	43
Annual Average	47	44	53	54	57

Table 6-12 above also provides a breakdown of monthly occupancy rates by grading. Average unit occupancy rates were generally higher for those in the 4 and 5 star during the summer months, particularly in August where these properties recorded averages of 82% and 91% respectively compared to 75% amongst those with a 2 star grading and 73% amongst those in the 3 star grading category. 2 star properties recorded higher averages than for a number of months outside of the main summer season, particularly at the start of 2012 where rates of 25% and 54% were recorded in January and February respectively. Please note the smaller sample size for this category when interpreting these results.

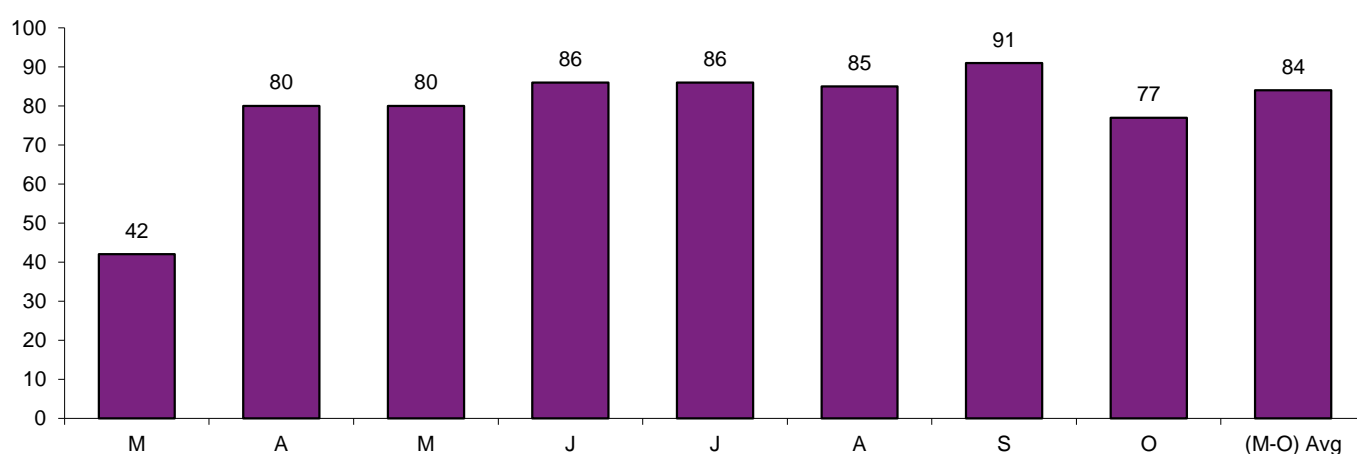
Caravan Holiday Homes and Chalets

In this section we report on the information collected from operators offering static caravans (and/or chalets) for let. Occupancy is measured by relating the number of units let during the reporting period to the total number available for let during that time.

Monthly Unit Occupancy

Figure 7-1 below presents the monthly occupancy rates for caravan holiday homes in 2012.

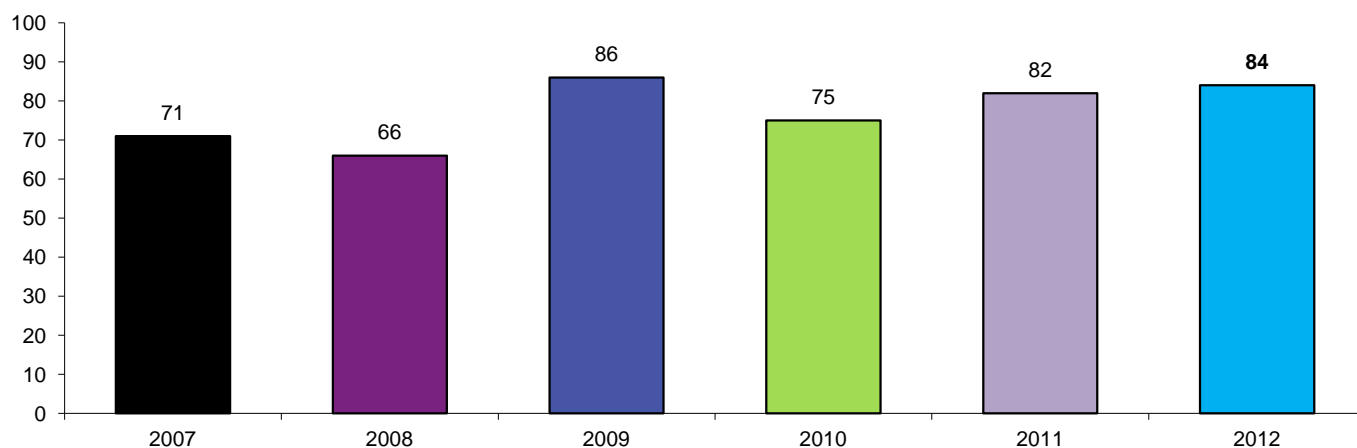
Figure 7-1 - Monthly Unit Occupancy – Caravan Holiday Homes – 2012 (%)



As in previous years, the monthly unit occupancy for caravan holiday homes increased considerably between March and April in 2012 (forty-two percentage points to 80% in 2012). This highlights the importance of the Easter Holiday period to this accommodation sector, which fell in early April in 2012. It is likely that a greater number of sites opened in April to take advantage of the Easter Holiday period. Since 2009, the average unit occupancy rates for May to July have shown the greatest consistency, while rates for September have shown a greater degree of variation.

Figure 7-2 below presents the occupancy rates for 2007 to 2012 for caravan holiday homes. As stated in the methodology section above, occupancy figures were collected in 2012 during March – October inclusive. Due to the low number of returned occupancy forms received in March in 2007 and 2008, monthly results have only been presented below for the April – October time period for these years.

Figure 7-2– Seasonal averages – Caravan Holiday Homes 2007 - 2012 (%)



At 84%, the May to October average for 2012 is two percentage points higher than the comparable 2011 rate of 82% and continues the increases recorded since 2010 (where a rate of 75% was recorded). This makes the 2012 May to October average the second highest recorded since 2007.

It is important to note that closures and sample sizes, particularly outside of the main summer season, are variable and therefore, the average occupancy rates by month can be quite variable between years.

Occupancy by Location – Coastal v Inland

Occupancy data was analysed for caravan holiday homes in coastal and inland locations. Table 7-2 below illustrates occupancy rates for caravan holiday homes in 2012 along with data for previous years, where available.

Table 7-2 - Monthly Unit Occupancy by Location – Caravan Holiday Homes (%)

	Coastal locations Static Occupancy (%)						Inland locations Static Occupancy (%)					
	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
March	*	*	56	37	19	44	*	*	*	27	18	28
April	57	52	74	81	84	84	50	24	46	46	43	50
May	67	63	83	81	83	86	59	48	57	*	36	39
June	73	74	88	87	83	90	49	48	58	53	41	54
July	66	75	89	85	88	89	62	61	55	60	62	51
August	92	84	94	91	93	87	73	93	96	92	90	74
September	80	73	90	64	87	93	44	61	67	64	69	64
October	56	36	85	46	70	79	43	41	46	*	58	*
May-Oct Average	72	68	88	76	84	87	55	59	63	59	59	56

**Sample <5*

Please note that the sample size, particularly for holiday homes based in inland locations, is low so these results should be interpreted with caution. It is recommended that comparisons are made between the May to October average.

Following a decrease between 2009 and 2010 (88% to 76%), the May to October average unit occupancy rate has risen year-on-year with the 2012 rate of 87% three percentage points higher than that recorded in 2011 for units in these locations (84%). This rate has returned to a similar level as that recorded in 2009 (88%) and is the second highest May to October average since 2007. In contrast, the May to October average for inland units in 2012 (56%) was three percentage points lower than the 2011 rate (59%) and the second lowest recorded for units in these locations since 2007.

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Results should be interpreted with a degree of caution due to the low sample size, particularly outside of the peak months of May to October

Table 7-3 below provides a breakdown of monthly occupancy rates by grade, as well as the May to October averages by size. The sample size for 1-3 star properties is too small to be reported

As in a number of previous years, ungraded caravan holiday homes recorded a higher May to October average than those with a grading of 4 or 5 stars in 2012. In 2012, the annual average unit occupancy rate for 4-5 stars was 58%, while the not graded May to October average was 81%. The May to October average for not graded properties is an increase on the rate recorded in 2011 (64%) which was lower than that recorded in 2010 (70%).

Due to the low sample size when analysed by grade, as in previous years, 4-5 star accommodation has been combined. Please note that no properties in this year's survey had a one or two star grading and just three properties had a three star grading.

Table 7-3 - Average Monthly Unit Occupancy by Grading – Caravan Holiday Homes (%)

	Unit Occupancy (%)	
	4-5 Star	Not graded
March	21	*
April	53	*
May	52	*
June	66	54
July	58	88
August	68	87
September	57	*
October	39	*
May – October Average	58	81

**Sample <5*

The sample size for ungraded properties was too low for analysis for a number of months outside of the main summer season. The average unit occupancy rate for ungraded properties was higher for the month of August (88% compared to 58% for 4-5 star properties), while 4-5 star properties recorded a higher average unit occupancy rate in June (66% compared to 54% for those without a star grading).

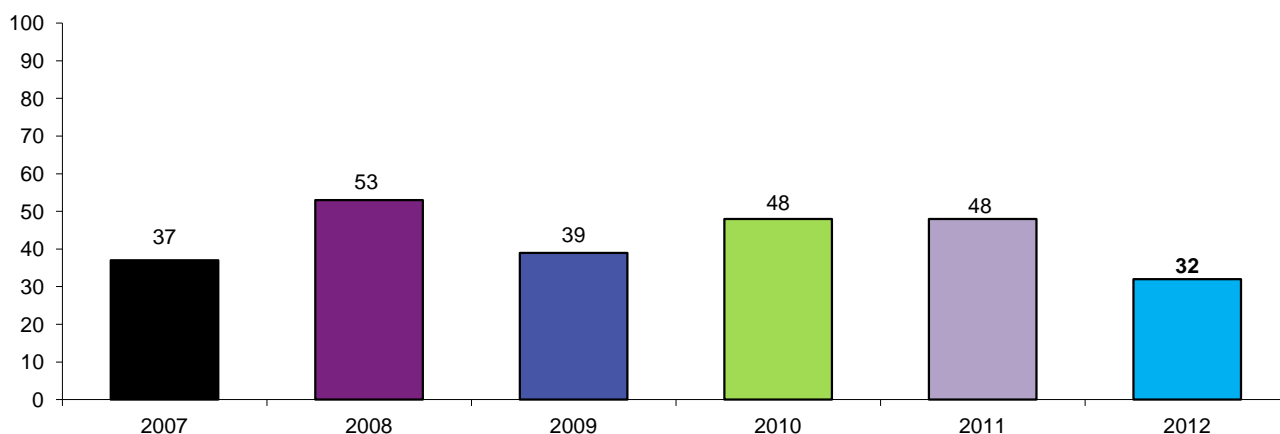
Touring Caravans and Camping Parks

This section of the report features parks offering touring caravan and camping pitches. This element of the survey covered the months of March to October inclusive, reflecting the closure of the majority of the sites during the winter months.

Monthly Unit Occupancy

Figure 8-1 below presents seasonal occupancy rates for 2012 for touring caravan and camping parks and where possible, results for 2007 to 2011. Due to the seasonality of this sector, very few returns were received outside of the main tourist season. Commentary and comparisons in this report are made across the season based on the column displaying May to October returns.

Figure 8-1 - Monthly Pitch Occupancy – Touring Caravan and Camping Parks 2007 – 2012 (%)



The May to October average for touring parks has shown a considerable degree of variation over the years. The rate for 2007 was 37%, a figure which rose to 53% in 2008 before falling to 39% in 2009. The 2010 and 2011 rates of 48% are sixteen percentage points higher than the 2012 average of 32%.

Please note that a participant with a large number of sites did not provide data in 2012. The relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data.

Occupancy by Location – Coastal v Inland

Occupancy data was analysed for touring caravan and camping parks located in coastal and inland locations. Table 8-2 below illustrates occupancy rates for touring caravan and camping parks in 2012 along with trended 2007 - 2012 data.

Table 8-2 - Monthly Unit Occupancy by Location – Touring caravan and camping parks (%)

	Coastal locations						Inland locations					
	Touring Occupancy (%)						Touring Occupancy (%)					
	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
March	*	*	9	10	8	14	*	*	15	6	14	6
April	28	21	25	26	28	21	28	30	22	22	47	17
May	37	50	40	31	26	21	29	56	29	36	49	20
June	37	47	41	49	36	36	30	59	26	39	56	31
July	46	60	61	51	48	47	34	62	28	64	64	32
August	72	76	80	70	66	65	45	68	38	68	64	41
September	33	36	38	37	29	25	28	48	19	48	49	24
October	17	42	22	21	13	19	21	37	18	38	36	9
May-Oct Average	40	52	47	43	36	37	31	55	26	49	53	27

Please note that the sample sizes for these areas are low so these results should be interpreted with caution.

Between 2008 and 2011, the May to October average for touring parks in coastal areas decreased year on year with an overall decrease from 52% to 36%. At 37%, the 2012 May to October average for parks in these locations was one percentage point higher than the 2011 rate (36%). This annual average for parks in inland locations has been more variable over the years. The 2012 rate for these sites (27%) is similar to that recorded in 2009 and twenty-six percentage points lower than that recorded in 2011 (53%).

Please note that a participant with a large number of sites did not provide data in 2012. The relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data.

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of the Visit Wales Grading Scheme. Due to the low sample size outside of the peak summer months of May to October; information has been presented below based on this complete time period.

Table 8-3 below shows the annual average unit occupancy rates by grading and monthly occupancy rates by grade.

In contrast to previous years, within the Visit Wales grading scheme, it was sites with a 2-3 star grading that recorded the highest May to October average pitch occupancy (40%), while those with a 4 star grading recorded a rate of 28%. Ungraded sites recorded a May to October average of 29%. Caution should be used when interpreting results due to the low sample size and sample changes.

Please note that no properties in this year's survey had a one star or a five star grading.

Table 8-3 - Average Monthly Unit Occupancy by Grading (%)

	Star Grading Unit Occupancy (%)		
	2-3 stars	4 stars	Not graded
March	17	3	5
April	25	15	14
May	26	15	14
June	41	29	21
July	50	35	35
August	62	52	49
September	32	22	19
October	17	6	20
May – Oct Average	40	28	29

NB: 2 star and 5 star sample <5

The largest difference between sites with a 2-3 star grading and those graded with 4 stars was recorded in July 2012, with average pitch occupancy rates of 50% and 35% respectively. Please take care when interpreting results due to the low sample size when analysed at this level.

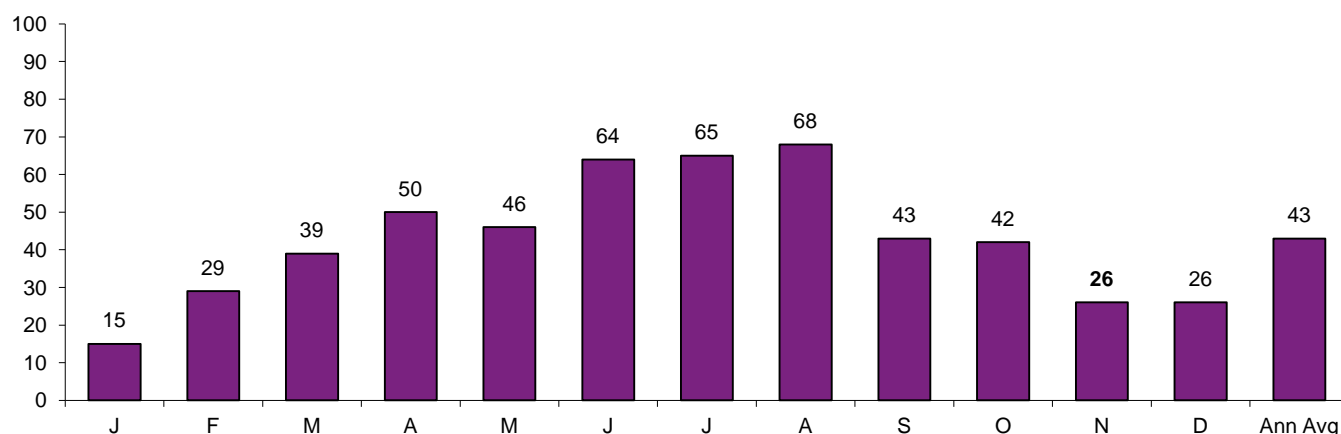
Please note that a participant with a large number of sites did not provide data in 2012. The relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data.

Hostels and Bunkhouses

Monthly Bed Occupancy

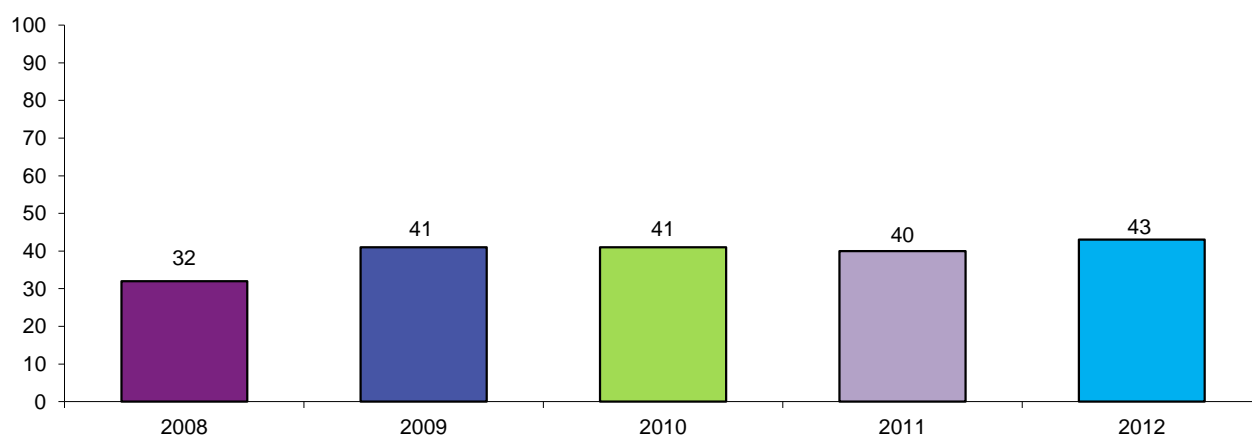
Figure 9-1 below presents the monthly and annual bed occupancy for hostels and bunkhouses between 2009 and 2012.

Figure 9-1 - Monthly Bed Occupancy – Hostels – 2012 (%)



The monthly average bed occupancy rate for hostels was 15% in January 2012. This figure rose to a peak of 68% in August before decreasing to 26% in November and December. The average bed occupancy rate in March 2012 was 39%, eleven percentage points higher than for the same month in 2011, while the rate for June rose from 53% in 2011 to 64% in 2012. Over the years, the average bed occupancy rates recorded towards the end of the year have demonstrated greater consistency than those recorded during the summer months, with the rates recorded for November and December in the range 22% - 26% since 2009.

Encouraging increases were recorded during the summer months in 2012. Between 2009 and 2011, the average bed occupancy rate for July decreased year-on-year from 68% to 62%, however, this rate increased to 65% in 2012. Increases were also recorded in June (eleven percentage points to 64%) and August where the average bed occupancy rate rose from 61% in 2011 to 68% in 2012.

Figure 9-2 – Annual Average Bed Occupancy – Hostels – 2008-2012 (%)

The annual average bed occupancy rate for hostels in 2012 was 43%, a three percentage point increase on the rate recorded in 2011 (40%) and the highest recorded by establishments in this sector over the past five years.

Overseas Occupancy

On the monthly occupancy form, hostel operators¹ are asked to identify the number of guests staying in the hostel each night and their nationality; either UK or overseas. It should be noted that not all establishments provide this information – in 2012, 162 forms were received with overseas data (43%).

Table 9-1 - Overseas Occupancy – Percentage of Bednights (%)

	Percentage of overseas bednights				
	2008	2009	2010	2011	2012
January	23	28	17	31	14
February	11	10	21	21	16
March	12	17	10	12	17
April	10	12	9	10	9
May	11	11	13	10	10
June	6	14	9	9	8
July	21	21	18	21	17
August	13	14	14	14	13
September	19	13	11	11	15
October	12	7	13	12	12
November	16	18	14	7	13
December	13	16	16	19	12
<i>Annual average</i>	<i>14</i>	<i>15</i>	<i>14</i>	<i>15</i>	<i>13</i>

As in previous years, there was a fair degree of variation in the percentage of overseas bednights when analysed by month, with the highest proportions were recorded in March (17%) and July (17%) 2012.

¹ Bunkhouse operators are not asked to differentiate between UK and overseas guests.

The timing of the Easter Holiday period had less of an effect on overseas occupancy than the overall rate, with the April 2012 rate which was almost half that recorded in March of the same year (17% and 9% respectively). Overseas occupancy levels continue to be high for a number of months in this accommodation sector, illustrating that Hostels are particularly popular with overseas visitors.

Since 2008, the greatest variations in the percentage of overseas bednights have been recorded for the months of January and February, months when fewer establishments tend to be open and therefore, the sample size is likely to be lower.

Please note that the percentage of overseas bednights refers to the number of nights spent by overseas guests as a percentage of the total number of bednights sold.

Figure 9-3 – Overseas and UK Monthly Bed Occupancy (%)

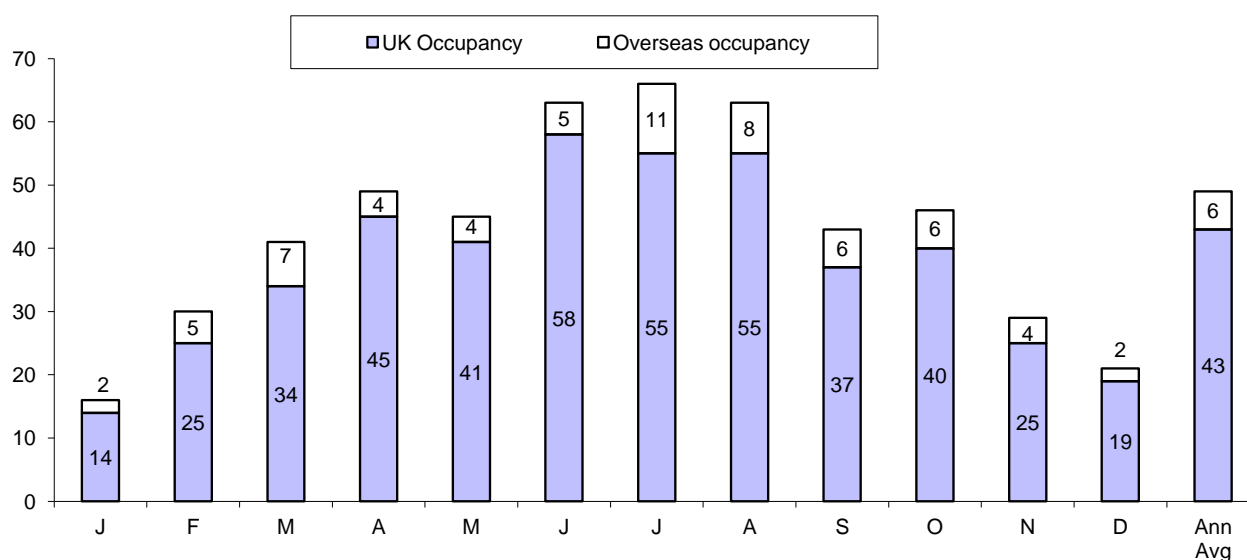


Figure 9-3 shows the monthly average bed occupancy rates for UK guests and Overseas guests. The UK monthly bed occupancy rates were higher for all months, with an annual average of 43% compared to 6% for overseas guests. Please note that overseas bed occupancy refers to the number of overseas bednights as a percentage of the total number of bedspaces available.

Occupancy by Location – Hostels

Occupancy data was analysed for hostels in coastal and inland locations. Table 9-2 below illustrates occupancy rates for hostels in the two locations.

Table 9-2 - Monthly Bed Occupancy by Location Hostels and Bunkhouses (%)

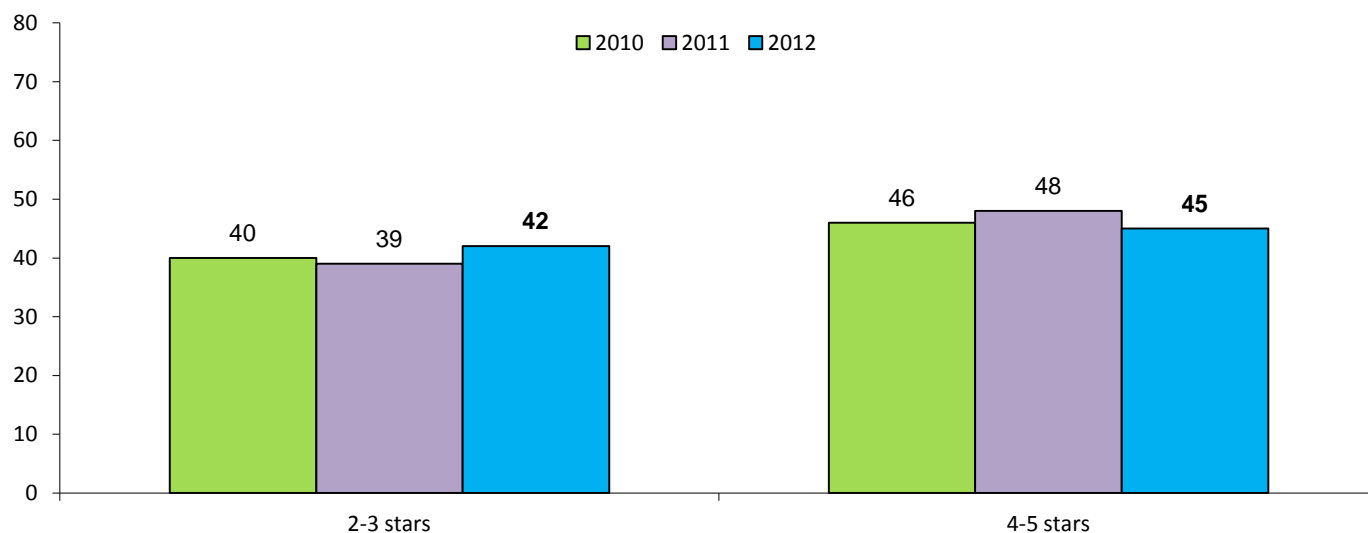
	Coastal locations	Inland locations
	Bed Occupancy	Bed Occupancy
	(%)	(%)
January	15	14
February	26	31
March	37	41
April	52	48
May	43	48
June	63	64
July	68	62
August	73	64
September	41	44
October	39	44
November	21	28
December	22	29
May-Oct Average	55	54
Annual Average	42	43

Similar levels of occupancy were reported annually for both coastal and inland locations (42% and 43% respectively), with coastal establishments recording higher rates during the main summer season and inland locations generally recording higher rates during the shoulder months. Please note that the sample is low and so this should be taken into account when analysing the results.

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Figure 9-5 below shows the annual average unit occupancy rates by grade.

Figure 9-4 - Annual Average Bed Occupancy by Grading – Hostels and Bunkhouses (%)



As with other accommodation sectors, there continued to be a positive relationship between the level of grading and occupancy level for the Hostels sector in 2012. Establishments in the higher 4-5 star grading category recorded an annual average bed occupancy of 45%, lower than in 2011 (48%) and three percentage points higher than the rate recorded for those with a 2-3 star grading (42%). Establishments in the lower grading category, however, recorded an increase in their annual average bed occupancy rate, which rose from 39% in 2011 to 42% in 2012.

Please note that no properties in this year's survey had a 1 star grading. Also, caution should be used when interpreting the results due to the low sample size.

Appendix 1: Hotels

Appendix 1a - Hotels: Bed Occupancy – monthly averages (%)

	Bed occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
January	23	25	24	25	24	26	25	26	26	27	26
February	33	33	33	33	35	35	34	33	35	35	34
March	37	36	36	37	35	37	38	34	36	38	42
April	37	43	41	41	44	44	40	42	45	45	44
May	45	48	48	46	49	50	49	46	47	46	45
June	50	47	48	49	50	51	47	48	50	49	50
July	51	52	53	52	56	53	52	52	54	50	50
August	58	59	56	56	60	60	55	56	57	52	58
September	48	50	51	51	55	54	51	50	52	49	54
October	42	43	42	42	45	45	45	45	45	45	45
November	35	34	35	34	37	38	38	36	35	38	37
December	30	31	33	32	34	34	33	34	29	31	37
Annual Average	41	42	42	42	44	44	43	42	43	42	44

Appendix 1b – Hotels: Bed Occupancy 2012 (%)

	2012 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	26	34	42	44	45	50	50	58	53	45	37	37	44
North Wales	29	36	47	50	51	58	56	68	58	48	43	40	49
Mid Wales	26	30	37	42	45	54	52	56	58	45	34	25	42
South East Wales	27	35	43	39	42	42	44	51	49	44	34	39	41
South West Wales	19	30	36	41	43	48	47	58	51	39	27	31	39
1-3 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
4-10 rooms	25	29	39	43	45	53	51	60	53	35	28	31	41
11-25 rooms	22	27	41	40	41	47	46	57	49	39	29	27	39
26-50 rooms	28	37	43	47	45	55	50	59	55	46	41	42	46
51-100 rooms	25	37	42	48	47	51	50	58	56	51	44	36	45
Over 100 rooms	30	38	45	41	47	47	51	59	54	49	40	42	46
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	19	29	39	49	43	50	45	50	38	33	38	37	41
£40-£49.99	26	32	43	39	46	50	48	70	61	55	29	25	42
£50-£59.99	29	40	43	48	48	56	48	62	60	45	39	35	45
£60 & over	26	34	43	44	46	49	51	59	54	46	37	38	44
Not graded	25	35	38	38	37	46	46	50	45	36	25	38	39
1 star	-	-	-	-	-	-	-	-	-	-	-	-	-
2 stars	30	35	47	48	46	59	55	65	64	44	42	44	48
3 stars	25	32	39	42	44	48	47	57	52	47	34	30	42
4 stars	26	33	43	49	50	55	54	62	56	48	43	39	46
5 stars	35	47	63	65	61	*	60	69	67	*	*	*	59
City/large town	29	38	46	40	44	44	48	54	52	46	38	43	44
Countryside/village	24	31	38	44	44	50	49	59	54	41	28	30	41
Seaside	27	36	45	47	46	57	53	64	56	45	41	38	47
Small town	22	29	35	43	48	47	47	54	51	48	37	28	41

* Sample size too small to undertake an analysis

- No returns received

Appendix 1c - Hotels: Room Occupancy 2012 (%)

	2012 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	40	49	58	57	63	66	67	72	71	60	52	49	59
North Wales	41	51	60	61	65	73	69	77	74	59	57	50	62
Mid Wales	32	39	49	53	59	66	64	67	72	59	46	32	54
South East Wales	46	56	65	58	66	62	67	70	71	63	53	54	61
South West Wales	28	40	44	49	49	61	63	69	64	55	37	44	50
1-3 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
4-10 rooms	31	33	41	46	54	64	63	68	65	47	39	40	49
11-25 rooms	34	42	53	50	51	60	58	64	63	49	38	37	51
26-50 rooms	46	52	60	61	64	70	64	72	73	60	57	55	62
51-100 rooms	41	56	61	67	69	69	73	78	77	71	63	54	65
Over 100 rooms	44	55	65	56	69	67	73	75	76	66	60	54	64
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	25	23	45	57	49	62	54	56	49	40	55	46	49
£40-£49.99	45	58	55	48	61	67	64	79	74	67	44	41	58
£50-£59.99	40	53	57	59	60	68	60	70	71	58	49	45	57
£60 & over	41	49	60	59	65	67	70	74	74	62	53	51	61
Not graded	37	50	55	50	51	61	59	60	59	48	39	46	52
1 star	-	-	-	-	-	-	-	-	-	-	-	-	-
2 stars	43	49	64	62	64	73	72	76	81	61	59	60	64
3 stars	41	48	57	57	62	67	64	72	72	63	50	43	58
4 stars	40	50	57	61	65	67	73	76	73	62	56	51	60
5 stars	52	58	75	65	81	*	82	85	87	*	*	*	77
City/large town	47	58	68	57	66	63	69	72	74	68	59	57	64
Countryside/village	37	44	48	53	55	63	65	67	67	52	41	41	53
Seaside	38	48	59	59	61	69	65	74	71	56	52	49	59
Small town	39	47	53	60	69	71	71	74	74	69	59	44	61

* Sample size too small to undertake an analysis

- No returns received

Appendix 2: Guest Houses and Bed & Breakfasts

Appendix 2a – Guest houses/bed and breakfasts: Trends in Bed Occupancy Rates – Monthly Averages (%)

	Bed occupancy										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
January	15	13	14	17	12	12	11	13	10	10	10
February	19	20	21	21	20	20	18	18	17	16	14
March	27	23	21	27	20	21	24	20	20	19	21
April	25	37	36	30	35	33	25	31	31	33	29
May	36	43	41	39	41	40	38	37	34	33	33
June	48	41	47	47	46	43	36	39	40	39	40
July	51	50	54	53	56	47	45	46	42	43	40
August	62	63	64	64	62	57	52	51	47	53	46
September	43	42	46	48	45	43	38	41	39	38	38
October	32	30	34	33	32	31	30	30	31	25	25
November	22	21	20	17	19	20	17	18	18	16	15
December	17	17	18	14	19	15	15	15	13	10	10
Annual Average	34	34	35	35	34	33	29	30	29	28	27

Appendix 2b – Guest houses/bed and breakfasts: Bed Occupancy 2012 (%)

	2012 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	10	14	21	29	33	40	40	46	38	25	15	10	27
North Wales	7	13	17	27	31	39	37	46	37	25	14	10	25
Mid Wales	10	12	21	27	33	37	37	40	30	19	12	9	25
South East Wales	16	16	23	22	25	30	28	30	29	20	16	10	23
South West Wales	8	15	22	37	40	51	54	63	53	34	17	11	35
1-3 rooms	8	12	16	25	29	34	35	42	32	18	12	10	23
4-10 rooms	9	15	22	31	35	43	43	49	42	28	16	10	29
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	-	*
26-50 rooms	*	*	*	*	*	*	*	*	*	*	-	-	*
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	9	10	17	20	18	21	24	32	26	16	18	18	19
£30-£39.99	11	16	22	30	33	41	43	46	38	27	16	9	28
£40-£49.99	8	13	21	29	37	43	41	42	41	24	13	10	29
£50-£59.99	*	*	*	29	*	42	51	61	42	17	*	*	*
£60 & over	11	12	20	29	33	41	31	*	*	*	*	*	*
Not graded	*	*	*	14	22	32	25	32	18	13	*	*	17
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
3 stars	9	10	19	22	24	33	33	37	29	17	15	11	23
4 stars	11	16	23	34	39	45	48	51	46	29	16	10	31
5 stars	8	13	19	31	35	46	39	64	44	25	15	9	28
City/large town	23	29	27	32	29	31	32	43	40	31	*	*	32
Countryside/village	9	12	19	28	30	39	39	46	36	24	15	9	26
Seaside	4	12	19	29	41	52	53	62	44	17	10	8	30
Small town	14	16	29	32	37	40	41	37	39	33	18	11	30

* Sample size too small to undertake an analysis

- No returns received

Appendix 2c – Guest houses/bed and breakfasts: Room Occupancy 2012 (%)

	2012 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	14	18	28	36	42	48	49	53	48	32	20	13	34
North Wales	9	19	26	32	38	45	44	56	44	30	18	13	31
Mid Wales	18	17	29	36	44	48	44	43	40	25	18	13	32
South East Wales	22	21	32	32	35	40	40	39	41	27	23	13	31
South West Wales	10	18	25	41	50	58	62	71	62	43	22	14	40
1-3 rooms	12	15	22	31	35	41	42	45	41	25	17	13	29
4-10 rooms	12	20	30	38	45	52	52	58	52	36	22	13	36
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	-	*
26-50 rooms	*	*	*	*	*	*	*	*	*	*	-	-	*
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	14	14	24	25	25	25	44	36	40	22	24	22	28
£30-£39.99	16	21	28	37	43	52	52	55	50	36	22	12	35
£40-£49.99	9	13	30	37	48	51	48	52	50	30	17	13	35
£50-£59.99	*	*	*	31	*	47	56	67	52	21	*	*	*
£60 & over	15	18	33	35	40	49	36	*	*	*	*	*	*
Not graded	*	*	*	19	27	33	24	27	24	18	*	*	19
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
3 stars	14	18	27	29	34	42	46	49	44	26	21	15	32
4 stars	16	19	29	40	48	54	55	57	56	38	23	14	37
5 stars	10	18	27	35	42	52	46	67	47	27	16	10	32
City/large town	27	36	41	43	42	43	58	61	56	36	*	*	45
Countryside/village	12	16	25	33	38	44	44	50	45	30	19	13	31
Seaside	4	15	24	34	49	62	60	67	53	24	13	9	36
Small town	26	27	45	47	52	56	53	50	56	48	28	16	43

* Sample size too small to undertake an analysis

- No returns received

Appendix 3: Self-catering

Appendix 3a – Independent Self Catering Cottages and Apartments Averages (%)

	<=£299.99		£300 - £499.99	
	Unit Occ (%)	Sample	Unit Occ (%)	Sample
January	27.1	44	17.3	38
February	35.6	49	33.3	49
March	35.3	33	37.4	65
April	60.1	19	51.5	59
May	50.2	19	51.1	54
June	78.7	10	57.5	49
July	-	-	69.1	33
August	70.8	7	80.0	33
September	66.5	17	70.8	53
October	48.7	23	51.1	56
November	33.2	36	31.8	33
December	29.8	13	30.6	26
<i>May-Oct Average</i>	<i>57.9</i>	<i>13</i>	<i>61.2</i>	<i>46</i>
<i>Apr-Oct Average</i>	<i>58.4</i>	<i>14</i>	<i>59.6</i>	<i>48</i>
<i>Jan-Dec Average</i>	<i>42.1</i>	<i>23</i>	<i>49.4</i>	<i>46</i>
	£500 - £799.99		£800 +	
	Unit Occ (%)	Sample	Unit Occ (%)	Sample
January	18.7	11	24.1	2
February	29.7	11	-	-
March	20.2	12	26.7	1
April	63.3	23	46.8	2
May	38.3	15	54.8	1
June	75.3	32	70.3	7
July	69.0	38	64.0	19
August	84.2	42	90.6	13
September	61.8	17	43.6	1
October	52.4	15	42.2	1
November	25.9	7	-	-
December	25.1	28	36.0	5
<i>May-Oct Average</i>	<i>68.7</i>	<i>27</i>	<i>71.5</i>	<i>7</i>
<i>Apr-Oct Average</i>	<i>68.0</i>	<i>26</i>	<i>70.0</i>	<i>6</i>
<i>Jan-Dec Average</i>	<i>54.4</i>	<i>21</i>	<i>63.7</i>	<i>4</i>