

Wales Accommodation
Occupancy Survey
2013 Annual Report



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Contents

1	Executive summary	2
2	Introduction	13
3	Hotels	14
4	Guest Houses/ B&Bs	27
5	All Serviced Accommodation	39
6	Self-catering Cottages & Apartments	42
7	Caravan Holiday Homes	55
8	Touring Caravan & Camping Parks	58
9	Hostels & Bunkhouses	62
	Appendix 1 – Hotels	68
	Appendix 2 – Guest Houses/ B&Bs	71
	Appendix 3 – Self-catering	74

1 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.

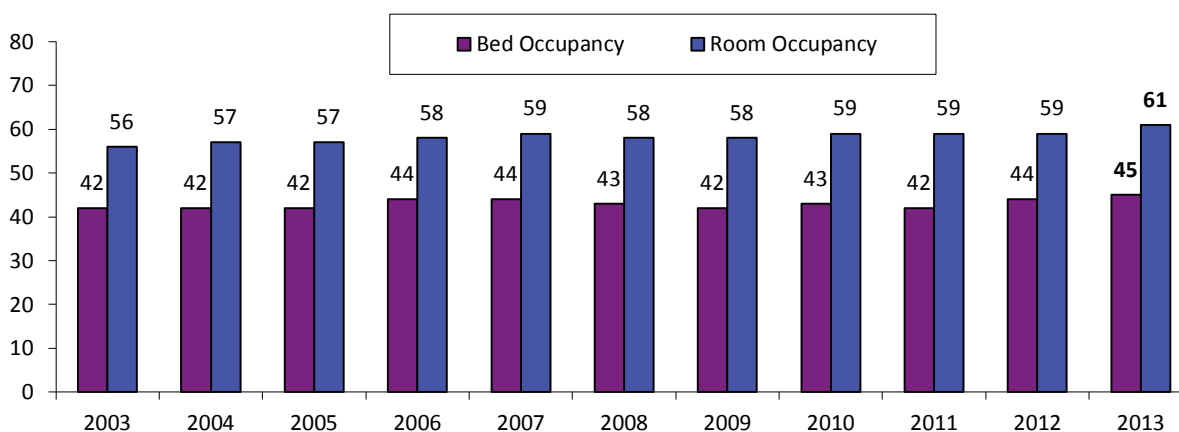
The self catering survey has been conducted in varying formats since 1987. The survey covers self catering accommodation, caravan holiday homes, touring caravan and camping parks. In addition, in 2008, hostels and bunkhouses were also included within the coverage of the survey.

Hotels

Annual Average Bed and Room Occupancy

The average bed and room occupancy rates for 2013 were 45% and 61% respectively. These rates represent a small increase on those recorded in 2012 and are also the highest annual average occupancy rates recorded for this sector since 2003.

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

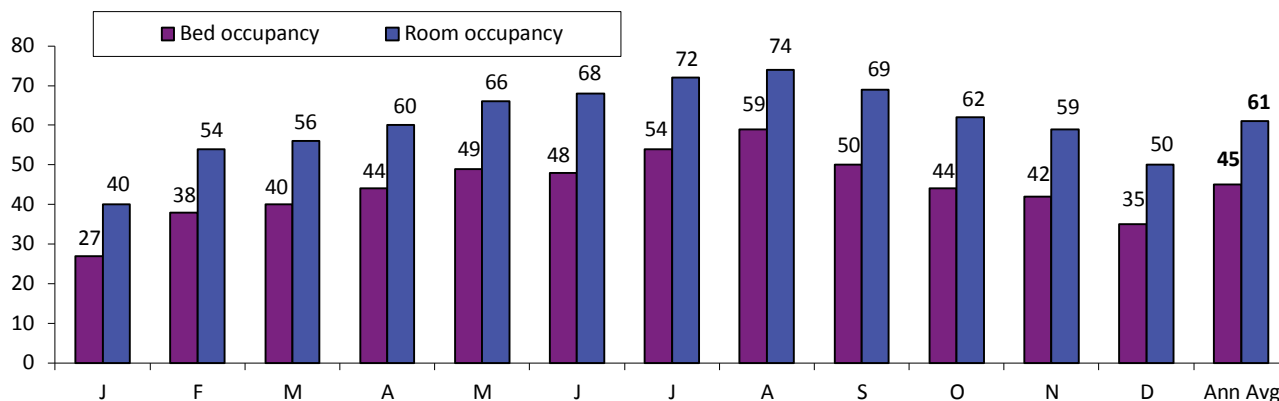


Over the past ten years, the annual average bed occupancy rate has shown the greatest consistency with rates in the range 42% - 45%. The annual room occupancy rate has risen overall during this time from 56% in 2003 to 61% in 2013.

Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2013 are presented in Figure 1-2 below.

Figure 1-2 - Hotels - Monthly Bed & Room Occupancy – 2013 (%)



The seasonality of occupancy rates for hotels in Wales continued to be evident in 2013. The average bed occupancy rate rose from 27% in January to a peak of 59% in August before falling to 35% in December. The average room occupancy rate also followed a similar pattern starting the year at 40% before rising to 74% in August and ending the year at 50% in December.

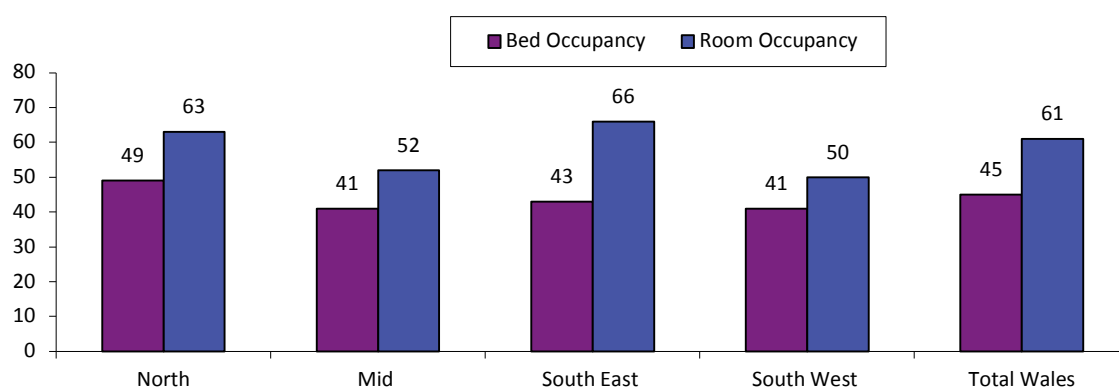
Regional occupancy rates

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

In regions other than North Wales, the annual average bed occupancy rate for hotels was fairly consistent with a rate of 41% recorded for Mid and South West Wales and a rate of 43% in South East Wales. The annual average bed occupancy rate for North Wales was highest of all the regions at 49%.

The annual average room occupancy rates were more variable. The highest rate was recorded in South East Wales (66%) followed by a rate of 63% for North Wales. Lower annual average occupancy rates were recorded in 2013 for Mid and South West Wales (52% and 50% respectively).

Figure 1-3 - Hotels - Annual Average by Regions of Wales – 2013 (%)



Percentage of Overseas Guests

For the first three months of 2013, the percentage of overseas bednights remained at 3%. As in previous years, the overseas bednight occupancy rate continued to be highest during the summer months, peaking at 9% in July with rates of 7% recorded in the summer months of June and August, as well as in September. The annual average was 6%.

Percentage of Business Guests

Business occupancy continued to demonstrate a converse pattern to that recorded for overall occupancy rates in 2013, with the highest rates recorded outside of the main summer season. In 2013, it was the end of the year when the highest average business occupancy rates were recorded with rates of 20% and 22% respectively for November and December. These high rates contrast with lower summer rates of 6%-7% resulting in an annual average of 10% for 2013.

Occupancy by Size

Variations by hotel size were more evident for annual average room occupancy than for bed occupancy in 2013. The annual average bed occupancy rates recorded across hotel size bands were in the range 42%-47% with no clear correlation between number of rooms and bed occupancy.

A much clearer pattern was recorded for the annual average room occupancy rate in 2013, with this rate increasing in line with the increased size bands. An annual average room occupancy rate of 71% was recorded in 2013 for establishments offering 101 rooms or more compared to a rate of 52% for those with 4-10 rooms. It is likely that larger establishments attracted a higher proportion of business occupants in which case rooms are more likely to have been occupied by a single guest.

Occupancy by tariff

In 2013, there was a general correlation between occupancy rates and tariff, however, the rates recorded did not increase consistently in conjunction with an increase in price. The highest annual average bed and room occupancy rates were recorded for hotels charging £60 or more (46% and 64% respectively). However, the lowest annual average bed occupancy rate was recorded by those charging £49-£49.99 (37%) rather than establishments in the lowest tariff band (although establishments charging £30-£39.99 did record the lowest annual average room occupancy rate of 49%).

Occupancy by Location

As in previous years, establishments in seaside areas recorded the highest annual average bed occupancy rate, which for 2013 was 50%. The lowest rate was recorded for hotels in small towns (39%), while city/large town and country/ village hotels recorded similar annual average bed occupancy rates (44% and 42% respectively).

Once again it was establishments in cities/ large towns that recorded the highest annual average room occupancy rate (69%) which compares with 52% in country/village locations and 60% each in seaside and small town locations. Establishments in cities/ large towns were more likely to attract business guests and in turn, to have a greater proportion of rooms occupied by a single guest.

Occupancy by Grading

While hotels not graded within the Visit Wales grading scheme recorded a lower annual average bed occupancy rate in 2013 than most graded establishments, this was equal to that recorded by hotels with a 3 star grading (42%). The highest annual average bed occupancy rate was recorded by establishments with a 5 star grading (57%).

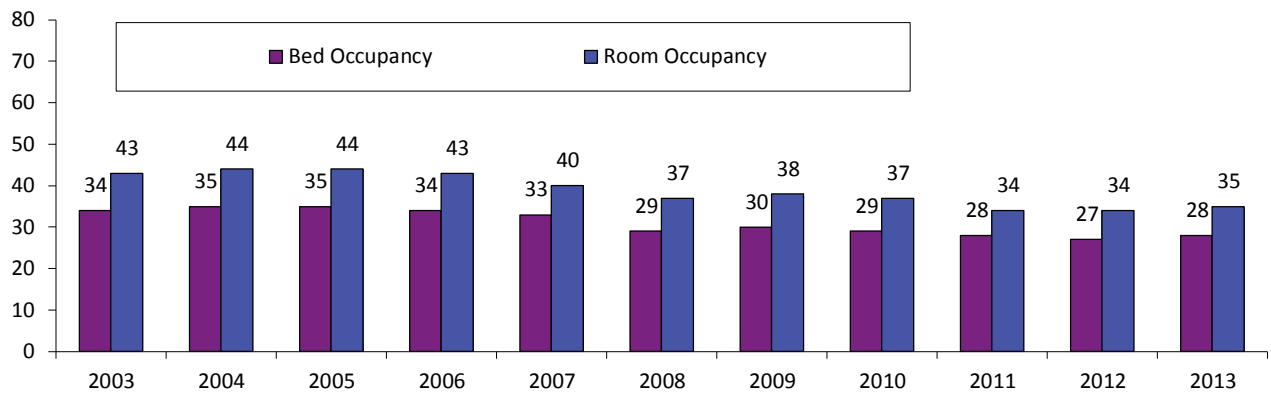
The annual average room occupancy rates recorded were more variable. Within the Visit Wales grading scheme, establishments with a 2 star grading recorded a rate of 65% while 3 and 4 star establishments recorded rates of 59% and 58% respectively. Again it was hotels with the highest star grading that recorded the highest annual average bed occupancy rate in 2013 (74%). Ungraded hotels recorded an annual average of 62%, higher than the rates for 3 and 4 star hotels.

Guest Houses/ B&Bs

Annual Average Bed and Room Occupancy

The annual average occupancy rates for Guest Houses/ B&Bs across Wales have shown a relative amount of consistency over the last three years. The annual average bed occupancy rate has been in the range 27%-28% while the annual average room occupancy rate has been either 34% or 35%.

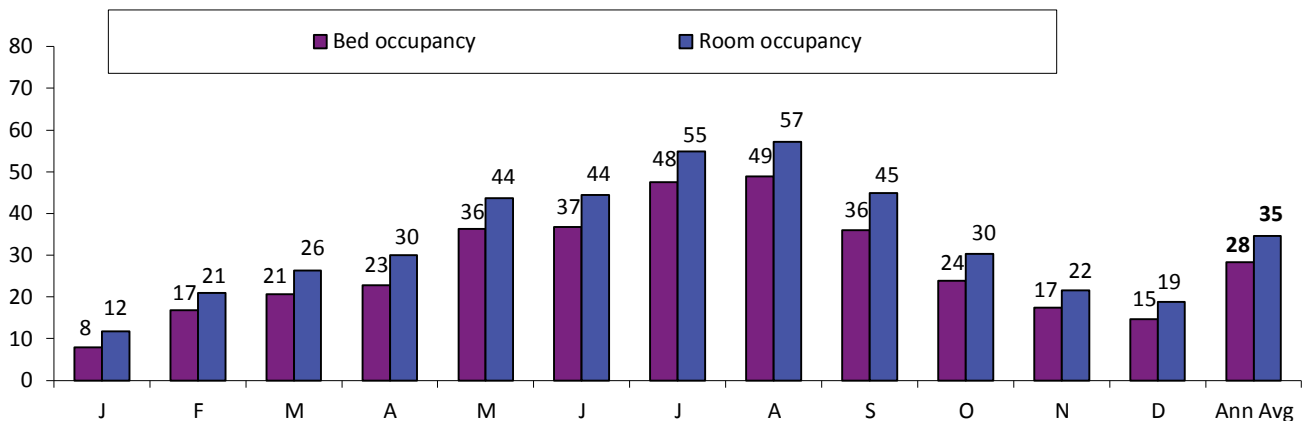
Figure 1-4- Guest Houses/B&Bs – Trends in Occupancy Rates – Annual Averages (%)



The 2013 annual averages represent a small increase on the 2012 figures, however, these have yet to return to the levels recorded prior to 2011. The highest rates recorded over the past ten years were recorded in 2004 and 2005 where the annual bed occupancy rates were 35% and the annual room occupancy rates were 44%.

Monthly Bed and Room Occupancy

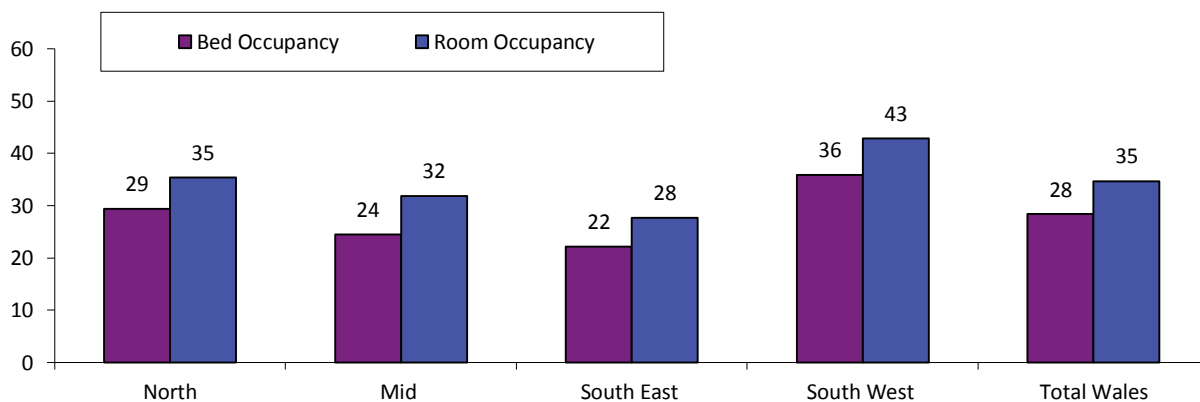
Figure 1-5 - Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2013 (%)



As in previous years, the seasonality of the Guest House/ B&B sector in Wales remains evident in 2013. The average bed occupancy rate began the year at 8% in January before rising to a peak of 49% in August and ending the year with a rate of 15% in December 2013. The average room occupancy rate also followed a similar pattern, rising from 12% in January to 57% in August and then decreasing to 19% in December.

Regional Occupancy Rates

Figure 1-6 - Guest Houses/B&Bs - Annual Average by Regions of Wales – 2013 (%)



As in previous years, the annual average bed and room occupancy rates were highest in South West Wales where averages of 36% and 43% respectively were recorded for establishments in this region. This contrasts with the South East where the annual average bed occupancy rate was 22% and an annual average room occupancy rate of 28% was recorded in 2013.

Percentage of Overseas Guests

April to September were the months when the highest averages for overseas bednights were recorded in 2013, with the peak rate recorded in July (17%). With the exception of the low rate recorded in January 2013 (5%), the proportion of overseas bednights demonstrated a high degree of consistency in the shoulder months (in the range 9%-10%).

Percentage of Business Guests

The annual average for business occupancy in the GH/B&B sector in Wales has been somewhat variable over the last few years, alternating between 20% and 15% (the latter being recorded in 2013). This overall variation covers some even larger variations when analysed on a monthly basis.

While the January 2013 average business occupancy rate is similar to that recorded in 2010 (58% and 61% respectively), it represents an eight percentage point increase on the 2012 rate of 50% and an even larger increase when compared to 2011 (43%). Business occupancy rates for this sector across Wales in December have been in decline since 2010 where a rate of 40% was recorded compared to 28% in 2013.

Occupancy by Size

Both the annual average bed and room occupancy rates were higher in 2013 for larger establishments. An annual average bed occupancy rate of 30% and an annual average room occupancy rate of 36% were recorded for Guest Houses/ B&Bs with 4-10 rooms compared to rates of 26% and 33% respectively for those with 1-3 rooms.

Occupancy by Tariff

The annual average occupancy rates for 2013 show a general correlation between tariff and occupancy rates, at least for the top and bottom tariff bands. Establishments charging £20-£29.99 recorded an annual average bed occupancy rate of 17% and an annual average room occupancy rate of 22% in 2013, which compares to 32% and 40% respectively for those charging £50-£59.99. The rates for the middle two tariff bands in 2013 were similar to each other.

Occupancy by Location

The highest annual average bed occupancy rate in 2013 was recorded for establishments in seaside areas (34%) while those in country/ village locations recorded an annual average of 27% and those in small towns a rate of 30%. The annual average room occupancy rates for establishments in seaside and small towns were similar (40% and 41% respectively), while those in country/village locations recorded a lower average of 32% in 2013.

Occupancy by Grading

As in previous years, a correlation between grading and occupancy levels was recorded in 2013. Guest Houses/ B&Bs that were not graded recorded an annual bed occupancy rate of 21% and an annual room occupancy rate of 26%, both of which are lower than those recorded for graded establishments.

Within the Visit Wales grading scheme, the annual average bed occupancy rates for 2013 increased in correlation with the number of stars that establishments in each category had been awarded. 3 star establishments recorded an annual bed occupancy average of 23% compared to 36% for those with a 5 star grading.

All Serviced Accommodation

Following a four year period in which a rate of 38% was recorded for annual average bed occupancy (2008 to 2011), this rate has risen by a small amount over the past two years to 40% in 2013. The annual average room occupancy rate has also demonstrated a great degree of consistency over recent years with a rate of 52% recorded each year between 2008 and 2012, with a slight increase in 2013 to 54%.

The average bed and room occupancy rates peaked in August 2013 when rates of 56% and 69% respectively were recorded. Lower levels were recorded outside of the main summer seas with the lowest averages recorded in January 2013 (21% and 33% respectively).

The annual average percentage of overseas guests has shown a high degree of consistency over the years, with the rates recorded between 2008 and 2013 in the range 6%-8%. During this time period, there have been variations recorded by month, however. In 2013, increases were recorded for a number of months when compared with 2012, particularly in June (three percentage points). March is the only month where the percentage of overseas guests has remained at the same level throughout the 2008 – 2013 period (5%).

Self-catering Accommodation

Monthly Unit Occupancy

Table 1-1 - Self-catering - Cottages and Apartments ALL (%)

	Average Unit Occupancy					
	2008	2009	2010	2011	2012	2013
January	24	20	17	29	32	28
February	37	43	34	42	41	36
March	39	41	37	38	45	43
April	48	51	49	63	55	46
May	54	55	53	65	48	59
June	57	56	60	65	65	56
July	64	67	67	71	68	68
August	81	75	81	85	81	82
September	62	61	60	72	64	65
October	50	45	31	55	50	53
November	25	22	22	31	36	30
December	36	48	35	32	38	33
<i>May – October average</i>	<i>61</i>	<i>60</i>	<i>59</i>	<i>69</i>	<i>63</i>	<i>64</i>
<i>Annual average</i>	<i>48</i>	<i>50</i>	<i>45</i>	<i>54</i>	<i>53</i>	<i>50</i>

As with the serviced sectors, self-catering accommodation also continued to demonstrate seasonality in the average unit occupancy rates recorded for each month in 2013. A unit occupancy rate of 28% was recorded in January which rose to a peak of 82% in August before falling to 30% in November and 33% in December.

There were several variations in the rates recorded when compared with 2012. An increase of eleven percentage points was recorded in the May 2013, while decreases of nine percentage points were recorded for the months either side of May (April and June). Longer term, the average unit occupancy rate for August was the highest recorded since 2008.

Independently Let Properties

The annual average unit occupancy rate for independently let properties across Wales was 46%. This decrease from 49% in 2012 continued the decline in this rate that has been evident since 2009. A number of increases by month were recorded during the first quarter of 2013 compared to 2012 – four percentage points in January and February followed by a five percentage point increase in March. However, decreases were recorded for a number of key summer months, most notably June where the 2013 rate of 53% was nine percentage points lower than the 2012 rate of 62% and the lowest recorded since 2007.

Agent Let Properties

Agency let properties have recorded relatively stable annual average unit occupancy rates in recent years. Between 2011 and 2013, the annual average unit occupancy rate has been in the range 57%-58%. However, greater variations have been recorded on a monthly basis. The average unit occupancy rate recorded for August 2013 (87%) was the highest rate recorded for this month since 2008. Following a large increase in 2012 (sixteen percentage points to 50%), a decrease of fifteen percentage points was recorded in the average unit occupancy rate for December with the 2013 rate of 35% very close to that recorded in December 2011 (34%).

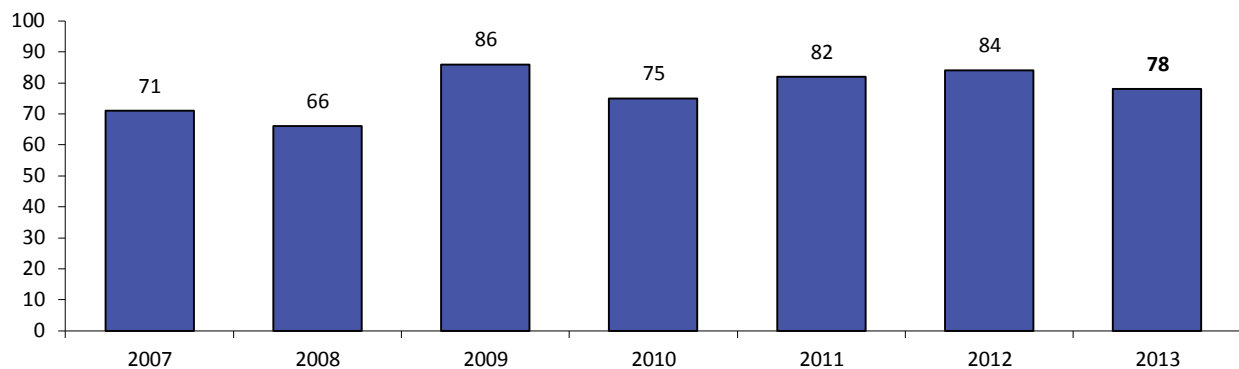
Unit Occupancy by Location

The annual average unit occupancy rates for both coastal and inland properties (irrespective of letting means) have shown a fair degree of consistency over the past six years. The annual average for all coastal properties has been in the range 54% to 56%, while the range for inland properties has been 49% to 52%.

May was a month in which occupancy rates rose for properties in both locations but particularly so for coastal locations. Here the 2013 rate of 69% was nineteen percentage points higher than the 2012 rate of 50%. Coastal properties also recorded increases for July (four percentage points) and August (six percentage points).

Caravan Holiday Homes

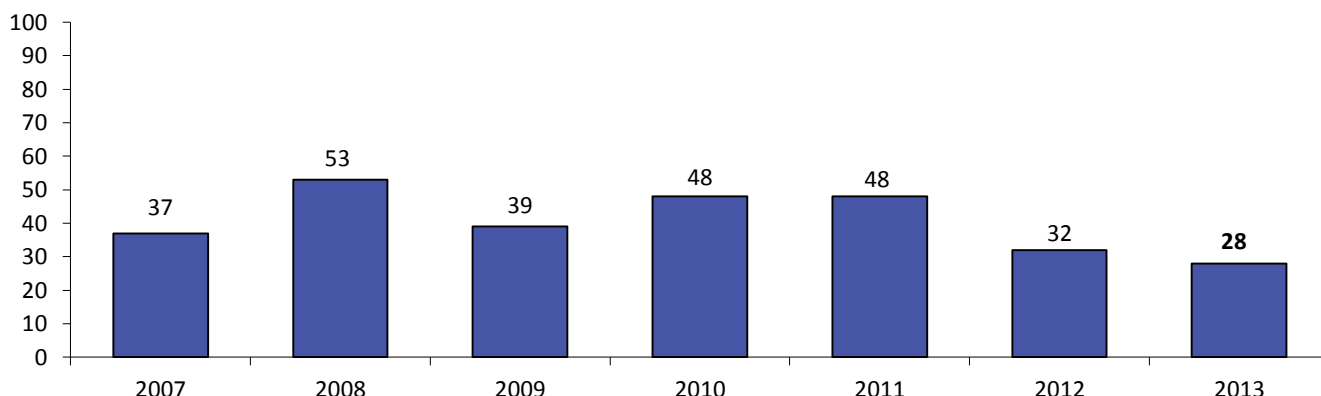
Figure 1-7 –Caravan Holiday Homes – Seasonal averages 2007 - 2013 (%)



The seasonal average for Caravan Holiday Homes has shown some variation over the past seven years, with the largest variation between 2008 (66%) and 2009 (86%). The 2013 average of 78% represents a six percentage point decrease from 84% in 2012 but remains higher than several previous years.

Touring Caravan and Camping Parks

Figure 1-8 –Touring – Seasonal Average Pitch Occupancy 2007 – 2013 (%)



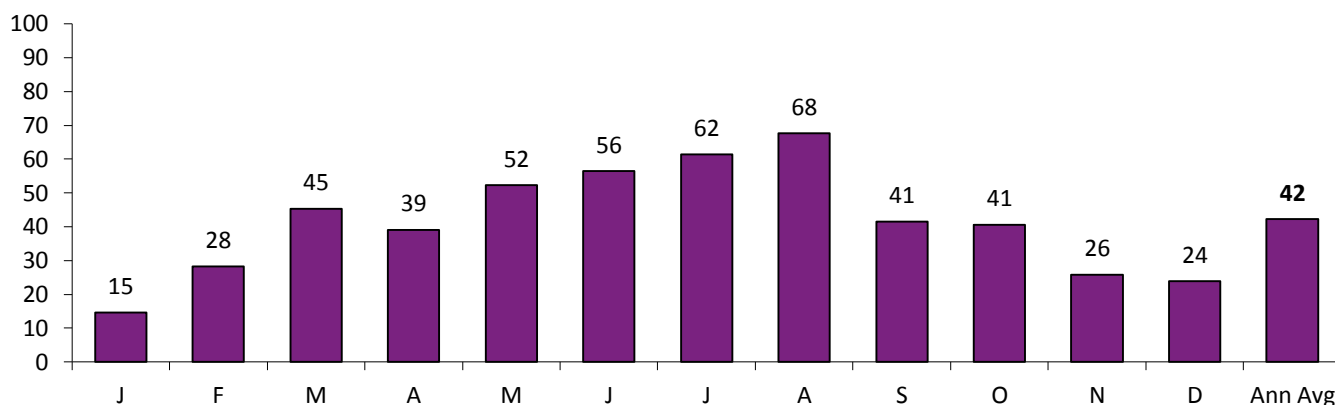
The May to October seasonal average has shown some variation over the years influenced, in part, by sample variations over time. The 2013 rate of 28% is four percentage points lower than the seasonal average recorded in 2012 (32%), however, this represents less of a decrease than that recorded between 2011 and 2012 (sixteen percentage points).

Please note that the relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data.

Hostels & Bunkhouses

Monthly Bed Occupancy

Figure 1-9 – Hostels & Bunkhouses - Monthly Bed & Room Occupancy - 2013 (%)



The annual average bed occupancy rate for Hostels and Bunkhouses was 42% in 2013. When analysed by month, the established pattern of seasonality was again evident with a rate of

15% recorded in January which rose to a peak of 68% in August before falling to 24% in December.

Overseas Occupancy

Throughout the years there has been a fair degree of variation in the percentage of overseas bednights when analysed by month while the annual average bed occupancy rate has remained relatively consistent (in the range 13% to 15%).

Between 2012 and 2013, decreases were recorded for February and March (six and four percentage points respectively). The year ended positively, however, with an increase of ten percentage points recorded for the November overseas bednights rate between 2012 and 2013, while the December rate rose from 12% in 2012 to 20% in 2013.

Occupancy by Location

Establishments located in coastal and inland locations recorded equal May to October averages in 2013 (54% each), with a slightly higher annual average for those located in inland areas compared to coastal locations (41% and 41% respectively).

Coastal establishments recorded higher average bed occupancy rates in the key summer months of July and August (63% and 72% respectively), while inland establishments recorded higher rates for a number of the shoulder months in 2013.

2 Introduction

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 bunkhouses were also included within the coverage of the survey.

This report covers the 2013 Wales Accommodation Occupancy 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/ B&Bs
- Section 5: All Serviced Accommodation
- Section 6: Self-catering Cottages and Apartments
- Section 7: Caravan Holiday Homes
- Section 8: Touring Caravan & Camping Parks
- Section 9: Hostels & Bunkhouses.

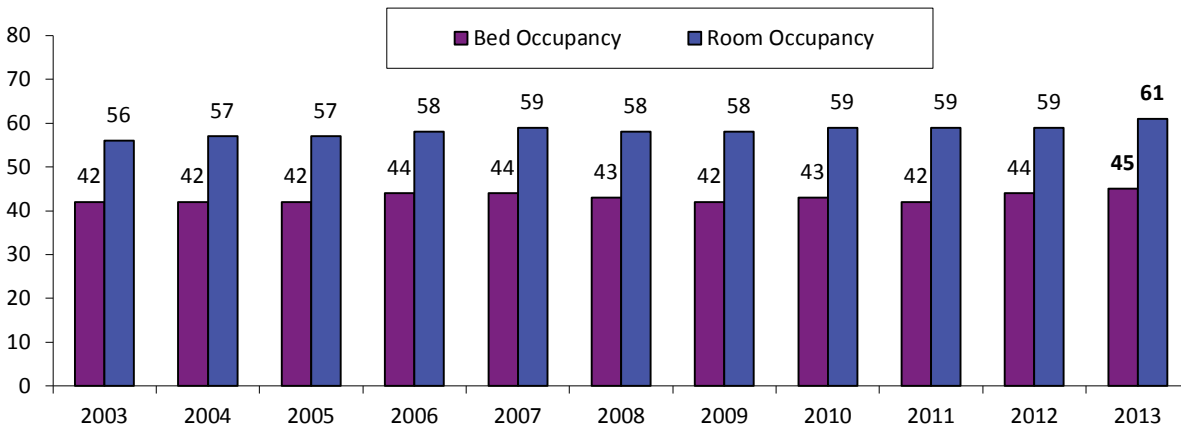
3 Hotels

This section of the report presents the 2013 occupancy data for hotels. For details of the survey methodology, there is a separate technical appendix available.

3.1 Annual Average Bed & Room Occupancy

The average bed and room occupancy rates for 2013 were 45% and 61% respectively. These rates represent a small increase on those recorded in 2012 and are also the highest annual average occupancy rates recorded for this sector since 2003.

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

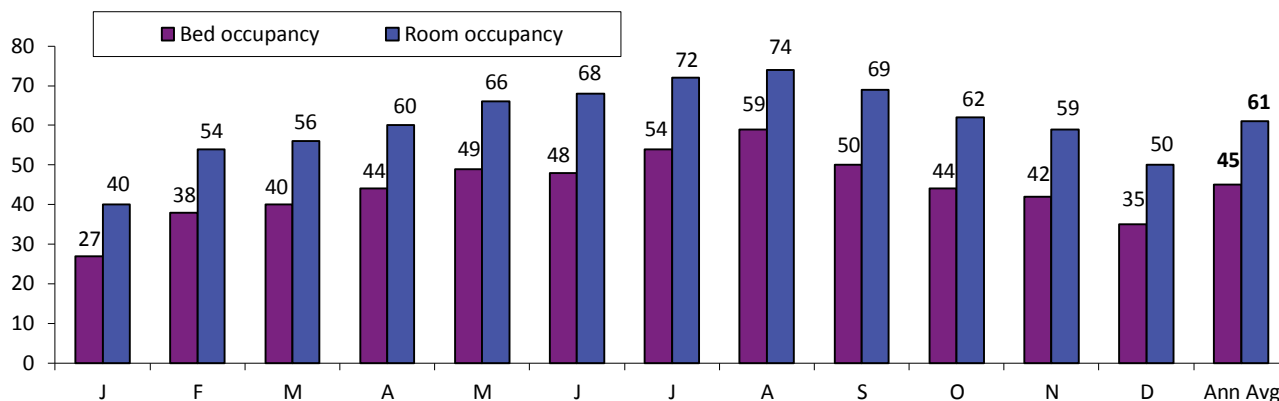


Over the past ten years, the annual average bed occupancy rate has shown the greatest consistency with rates in the range 42% - 45%. The annual room occupancy rate has risen overall during this time from 56% in 2003 to 61% in 2013.

3.2 Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2013 are presented in Figure 3-2 below.

Figure 3-2 - Hotels - Monthly Bed & Room Occupancy – 2013 (%)



The seasonality of occupancy rates for hotels in Wales continued to be evident in 2013. The average bed occupancy rate rose from 27% in January to a peak of 59% in August before falling to 35% in December. The average room occupancy rate also followed a similar pattern starting the year at 40% before rising to 74% in August and ending the year at 50% in December.

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

	Room occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
January	37	35	40	38	40	39	40	39	40	40	40
February	48	49	48	50	50	50	48	50	53	49	54
March	50	52	52	51	53	54	51	53	56	59	56
April	56	54	57	58	58	56	58	60	61	57	60
May	62	63	63	65	65	66	62	64	64	63	66
June	63	65	65	66	67	66	68	69	68	66	68
July	66	67	67	70	67	67	70	70	69	67	72
August	69	68	69	73	73	71	70	69	67	72	74
September	67	69	69	71	71	69	69	70	68	71	69
October	58	58	58	61	62	61	63	63	61	60	62
November	50	52	50	53	55	54	54	54	56	52	59
December	43	45	43	44	47	45	47	42	44	49	50
Annual Average	56	57	57	58	59	58	58	59	59	59	61

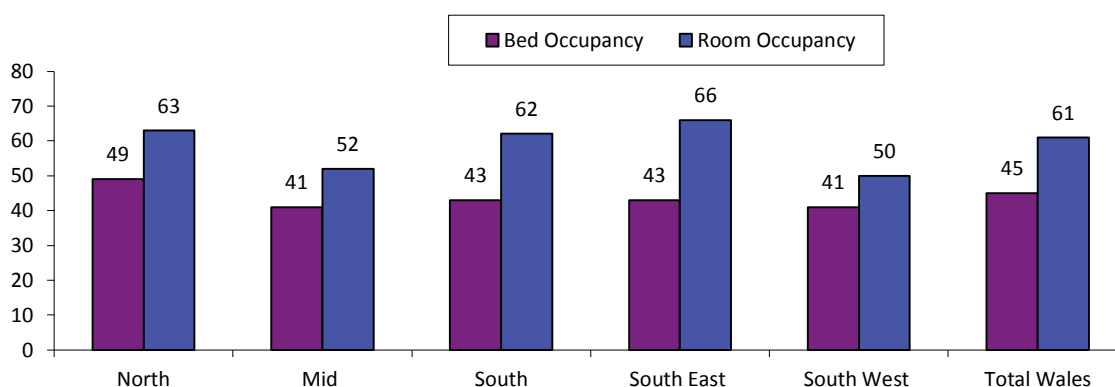
Increases in the average room occupancy rate for hotels were recorded for a number of months. In particular, the 2013 rates were consistently higher than those recorded in 2012 for the months of April to August – key months for the tourism sector. The rate for August 2013 was the highest recorded for this month over the past ten years. Following a decrease in 2012 (56% in 2011 to 52%), the average room occupancy rate for November rose in 2013 by seven percentage points to 59%.

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

3.3 Regional Occupancy Rates

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

Figure 3-3 - Hotels - Annual Average by Regions of Wales – 2013 (%)



In regions other than North Wales, the annual average bed occupancy rate for hotels was fairly consistent with a rate of 41% recorded for Mid and South West Wales and a rate of 43% in South East Wales. The annual average bed occupancy rate for North Wales was highest of all the regions at 49%.

The annual average room occupancy rates were more variable. The highest rate was recorded in South East Wales (66%) followed by a rate of 63% for North Wales. Lower annual average occupancy rates were recorded in 2013 for Mid and South West Wales (52% and 50% respectively).

Average bed and room occupancy levels for each region on a monthly basis for 2013 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.

3.3.1 Trends in Regional Occupancy Rates

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

	Annual Average Room Occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Wales	53	54	54	57	59	57	62	61	61	62	63
Mid Wales	51	52	52	53	53	50	49	49	54	54	52
South East Wales	62	63	60	63	63	66	62	62	61	61	66
South West Wales	54	55	59	58	58	56	53	54	51	50	50
<i>TOTAL</i> <i>WALES</i>	56	57	57	58	59	58	58	59	59	59	61

In most regions, the annual average room occupancy rate recorded in 2013 demonstrated a good degree of consistency with 2012. The rate for South West Wales remained equal with 2012, while the rate for North Wales has risen slightly year-on-year since 2011 (61% to 63%).

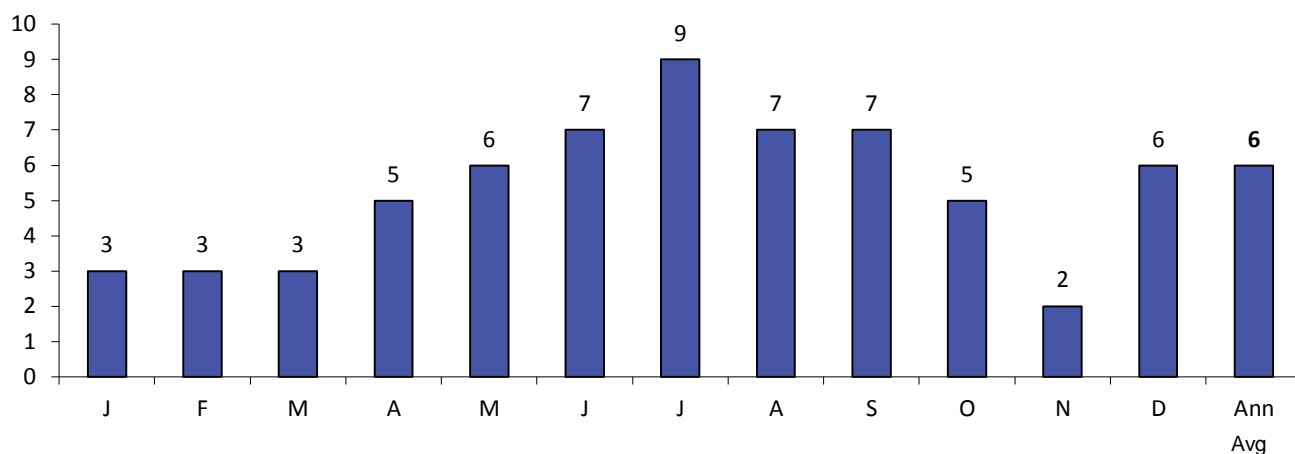
It was the South East region where the greatest difference was recorded in 2013. The annual average room occupancy rate of 66% was five percentage points higher than in 2011 and 2012 (61%) and along with the 2008 rate was the highest average recorded for this region over the past ten years.

3.4 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 was not collected from 2008 onwards, so consequently, we have presented the proportion of overseas stays as a percentage of bednights (based on total bednights).

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 2013 results.

Figure 3-4 – Hotels - Percentage of Overseas Bednights 2013 (%)



For the first three months of 2013, the percentage of overseas bednights remained at 3%. As in previous years, the overseas bednight occupancy rate continued to be highest during the summer months, peaking at 9% in July with rates of 7% recorded in the summer months of June and August, as well as in September. The annual average was 6%.

3.4.1 Trends in Percentage of Overseas Guests

The annual average overseas bednights rate for 2013 was 6%, two percentage points higher than in 2012 and the highest recorded over the past six years (as shown in Table 3-3 below).

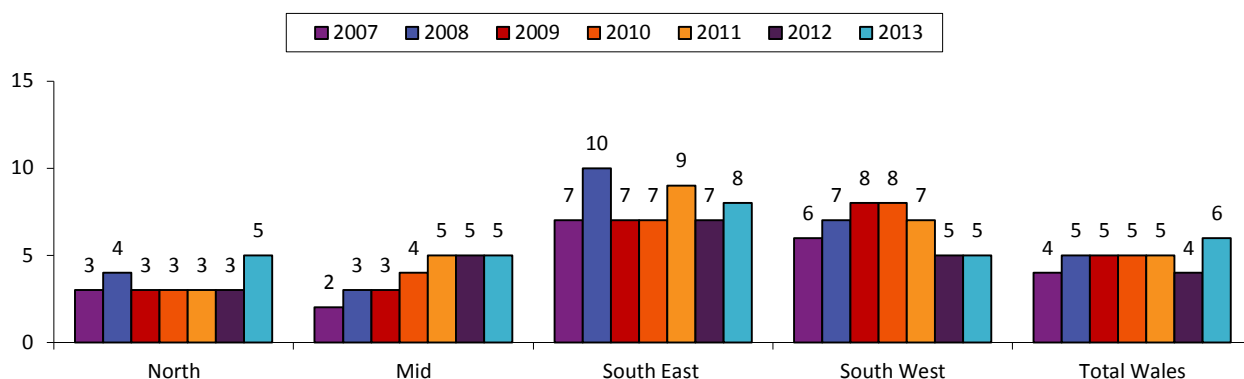
Table 3-3 – Hotels – Trends in Percentage of Overseas Guests

	% of overseas bednights					
	2008	2009	2010	2011	2012	2013
January	3	5	4	6	5	3
February	2	4	4	4	2	3
March	3	4	5	5	4	3
April	4	4	4	4	4	5
May	6	5	5	6	5	6
June	6	5	6	6	3	7
July	7	6	6	7	6	9
August	4	5	4	5	7	7
September	8	5	6	5	5	7
October	5	4	6	4	4	5
November	7	4	5	4	2	2
December	3	2	3	3	3	6
<i>Annual Average</i>	5	5	5	5	4	6

Overseas bednight occupancy rates have been more variable than annual rates when analysed on a monthly basis, however, given the relatively small proportions recorded, these have not

been particularly sizeable variations. In 2013, the largest increases were evident for the summer months of June and July where increases of four and three percentage points respectively were recorded.

Figure 3-5 – Hotels – Percentage of Overseas Guests by Region 2008 – 2013 (%)

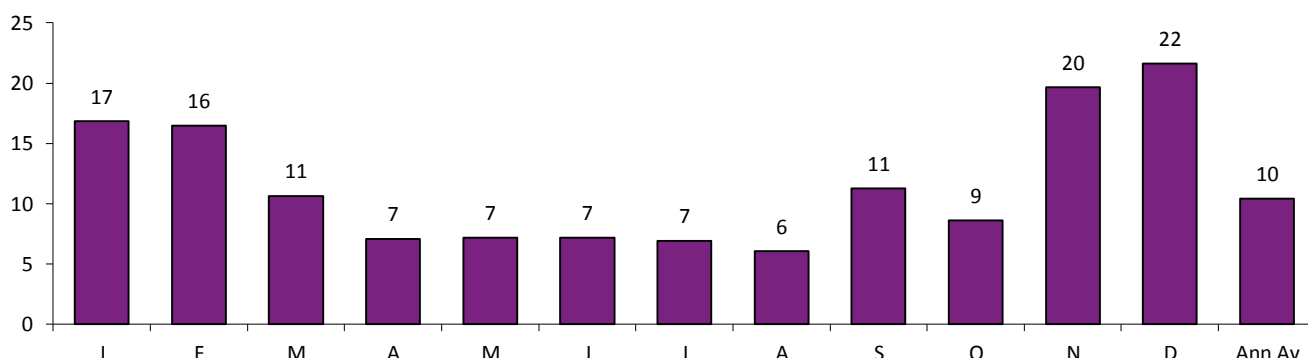


The general pattern of higher overseas guest occupancy in South East continued with a rate of 8% recorded in this region in 2013. A rate of 5% was recorded in Mid, South West and North Wales, with the latter representing a two percentage point increase on the rate recorded for each year for this region between 2009 and 2012 (3%).

3.5 Percentage of Business Guests

On the monthly occupancy form, operators were asked to identify the number of guests staying in the hotel each night for business purposes. It should be noted that not all participants provided this information. The monthly data for 2013 is shown in Figure 3-6 below.

Figure 3-6 – Hotels – Percentage of Business Guests 2013 (%)



Business occupancy continued to demonstrate a converse pattern to that recorded for overall occupancy rates in 2013, with the highest rates recorded outside of the main summer season. In 2013, it was the end of the year when the highest average business occupancy rates were recorded with rates of 20% and 22% respectively for November and December. These high rates contrast with lower summer rates of 6%-7% resulting in an annual average of 10% for 2013.

Table 3-4 – Hotels - Trends in Percentage of Business Guests

	% of business guests										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
January	36	41	45	41	33	38	31	22	29	27	17
February	33	38	37	30	25	26	26	19	21	17	16
March	30	39	30	28	21	19	24	20	19	11	11
April	21	25	26	15	15	24	17	13	9	7	7
May	18	24	19	17	18	16	16	15	15	9	7
June	19	20	21	17	16	19	20	14	12	7	7
July	17	22	19	17	14	18	17	13	11	7	7
August	13	15	14	14	10	11	11	9	9	6	6
September	20	21	22	15	12	18	14	12	10	6	11
October	28	25	25	21	15	21	18	15	13	8	9
November	38	38	34	24	23	28	19	24	21	11	20
December	26	24	28	18	24	21	17	20	14	12	22
<i>Annual Average</i>	<i>23</i>	<i>27</i>	<i>25</i>	<i>20</i>	<i>18</i>	<i>20</i>	<i>18</i>	<i>15</i>	<i>14</i>	<i>9</i>	<i>10</i>

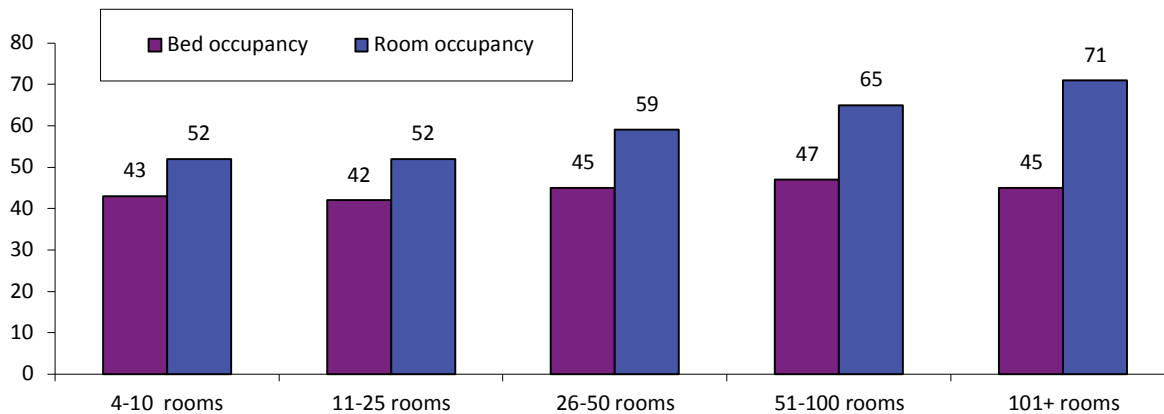
While the annual average business occupancy rate did not vary greatly in 2013 when compared to the previous year, there were greater variations recorded for the monthly averages. This was particularly noticeable in January where the 2013 rate was ten percentage points lower than that recorded for this month in 2012 (17% and 27% respectively), as well as in November and December where the 2013 rates were nine and ten percentage points higher respectively than in 2012.

Please note that while the sample sizes for those providing business data were fairly consistent between 2012 and 2013 each month, not all establishments provide business occupancy data.

3.6 Occupancy by Size of Hotel

The annual average bed and room occupancy figures by size of hotel for 2013 are presented in Figure 3-7 below. Due to the small sample size there is no analysis presented 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 3-7 – Hotels – Annual Occupancy by Size of Hotel - 2013 (%)



Variations by hotel size were more evident for annual average room occupancy than for bed occupancy in 2013. The annual average bed occupancy rates recorded across hotel size bands were in the range 42%-47% with no clear correlation between number of rooms and bed occupancy.

A much clearer pattern was recorded for the annual average room occupancy rate in 2013, with this rate increasing in line with the increased size bands. An annual average room occupancy rate of 71% was recorded in 2013 for establishments offering 101 rooms or more compared to a rate of 52% for those with 4-10 rooms. It is likely that larger establishments attracted a higher proportion of business occupants in which case rooms are more likely to have been occupied by a single guest.

Table 3-5 – Hotels - Trends in Percentage of Business Guests

	Annual Average Room Occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
4-10 rooms	44	48	47	47	46	40	40	45	52	49	52
11-25 rooms	50	50	52	53	54	53	55	53	54	51	52
26-50 rooms	54	56	56	58	61	62	58	57	56	62	59
51-100 rooms	63	66	60	62	64	66	63	66	65	65	65
101+ rooms	68	68	69	71	68	67	69	68	63	64	71

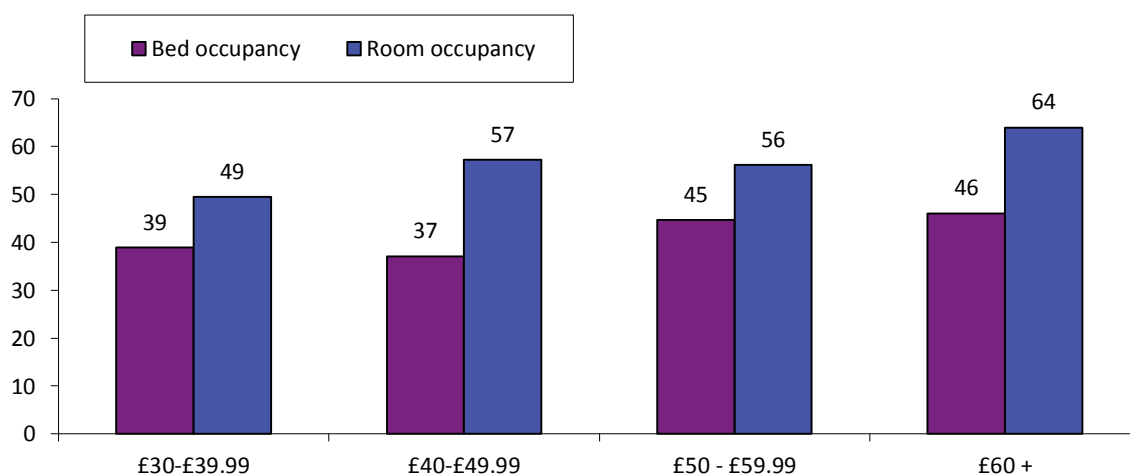
As shown in Table 3-5 above, the largest increase in the annual average room occupancy rate in 2013 was recorded for establishments with 101 rooms or more (71% compared to 64% in 2012). Those with 4-10 rooms and those with 26-50 rooms have demonstrated contrasting patterns over the last three years with the annual average room occupancy rate for the former falling in 2012 before rising in 2013 while the reverse was true for the latter.

3.7 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 3-8 below shows annual bed and room occupancy figures by tariff for 2013. 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 2013.

Figure 3-8 – Hotels – Annual Occupancy by Tariff of Hotel – 2013 (%)



In 2013, there was a general correlation between occupancy rates and tariff, however, the rates recorded did not increase consistently in conjunction with an increase in price. The highest annual average bed and room occupancy rates were recorded for hotels charging £60 or more (46% and 64% respectively). However, the lowest annual average bed occupancy rate was recorded by those charging £49-£49.99 (37%) rather than establishments in the lowest tariff band (although establishments charging £30-£39.99 did record the lowest annual average room occupancy rate of 49%).

Table 3-6 - Hotels – Trends in Annual Room Occupancy Rates by Tariff of Hotel (%)

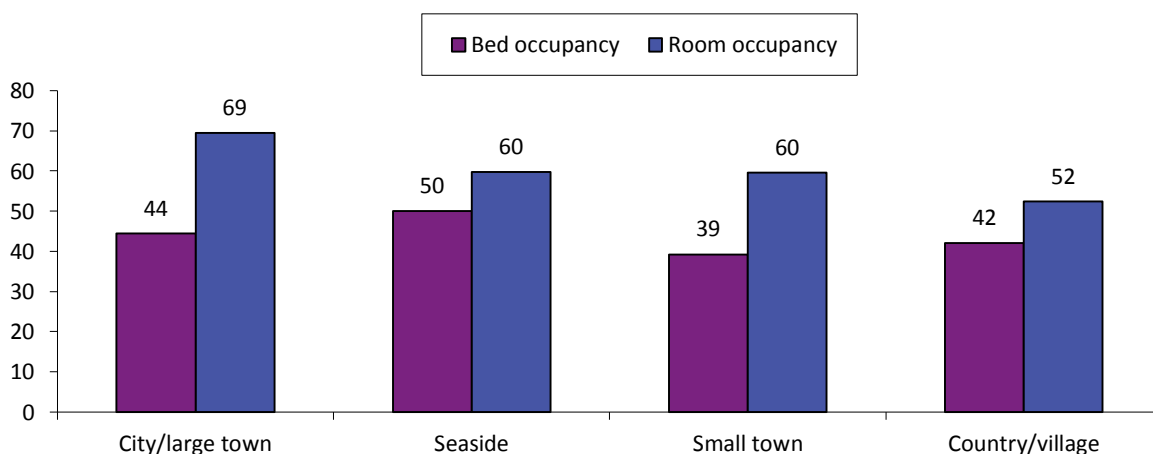
	Annual Average Room Occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
£30-£39.99	44	49	50	47	48	45	43	45	46	49	49
£40-£49.99	57	53	57	44	53	51	51	55	59	58	57
£50-£59.99	58	58	57	62	62	59	54	59	60	57	56
£60+	61	60	60	61	63	64	63	61	60	61	64

The annual average room occupancy rate remained relatively consistent with previous years for most tariff bands in 2013. However, those charging £60 or more recorded an increase of three percentage points on the rate recorded in 2012 (64% in 2013, 61% in 2012), returning to the same rate as that recorded in 2008.

3.8 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.

Figure 3-9 – Hotels – Annual Occupancy by Location of Hotel - 2013 (%)



As in previous years, establishments in seaside areas recorded the highest annual average bed occupancy rate, which for 2013 was 50%. The lowest rate was recorded for hotels in small towns (39%), while city/large town and country/ village hotels recorded similar annual average bed occupancy rates (44% and 42% respectively).

Once again it was establishments in cities/ large towns that recorded the highest annual average room occupancy rate (69%) which compares with 52% in country/village locations and 60% each in seaside and small town locations. Establishments in cities/ large towns were more likely to attract business guests and in turn, to have a greater proportion of rooms occupied by a single guest.

Table 3-7 – Hotels - Trends in Annual Room Occupancy Rates by Location of Hotel (%)

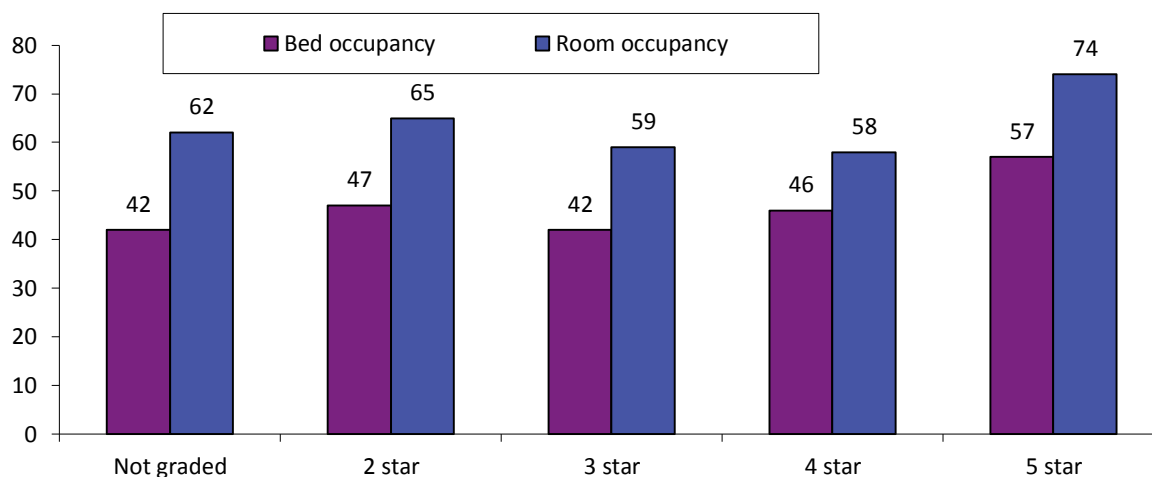
	Annual Room Occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
City/large town	72	69	67	71	71	71	69	66	62	64	69
Small town	53	54	56	57	57	53	55	61	59	61	60
Seaside	57	56	56	57	62	60	58	59	60	59	60
Countryside/village	52	53	53	53	52	53	52	53	55	53	52

Between 2009 and 2011, establishments in cities/ large towns recorded a decrease of seven percentage points in their annual average room occupancy rate, which fell from 69% to 62%. This rate has recovered over the past two years, with the 2013 rate (69%) equal to that recorded in 2009. The reverse can be seen for hotels in countryside/ village locations where the annual average room occupancy rate rose from 52% in 2009 to 55% in 2011 before returning to 52% in 2013.

3.9 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 presented for 1 star graded hotels as there were no hotels with this grading in the sample in 2013.

Figure 3-10 – Hotels – Annual Occupancy by Grading of Hotel – 2013 (%)



While hotels not graded within the Visit Wales grading scheme recorded a lower annual average bed occupancy rate in 2013 than most graded establishments, this was equal to that recorded by hotels with a 3 star grading (42%). The highest annual average bed occupancy rate was recorded by establishments with a 5 star grading (57%).

The annual average room occupancy rates recorded were more variable. Within the Visit Wales grading scheme, establishments with a 2 star grading recorded a rate of 65% while 3 and 4 star establishments recorded rates of 59% and 58% respectively. Again it was hotels with the highest star grading that recorded the highest annual average bed occupancy rate in 2013 (74%). Ungraded hotels recorded an annual average of 62%, higher than the rates for 3 and 4 star hotels.

Table 3-8 – Hotels - Trends in Annual Room Occupancy Rates by Grading of Hotel (%)

	Annual Room Occupancy									
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Not graded	52	39	36	42	51	46	53	54	53	62
2 stars	59	56	58	56	61	59	59	64	64	65
3 stars	56	57	59	60	61	58	58	57	59	59
4 stars	60	59	61	61	57	64	64	60	60	58
5 stars	49	53	57	65	62	68	67	73	77	74

Over the past ten years, the annual average room occupancy rate has shown the greatest consistency for establishments with a 3 star grading with this rate in the range 56%-61% over this period of time. Although the 2013 rate for 5 stars was lower than in the previous year

(74% and 77% respectively), there has been an overall increase in this rate since 2004 where a rate of 49% was recorded.

Ungraded establishments have often recorded a fair degree of fluctuation in their annual average room occupancy rates over the years, with the largest variation recorded between 2004 and 2005 (a decrease of thirteen percentage points). In 2013, these hotels recorded an increase of nine percentage points in their annual average room occupancy rate, which rose from 53% in 2012 to 62% in 2013.

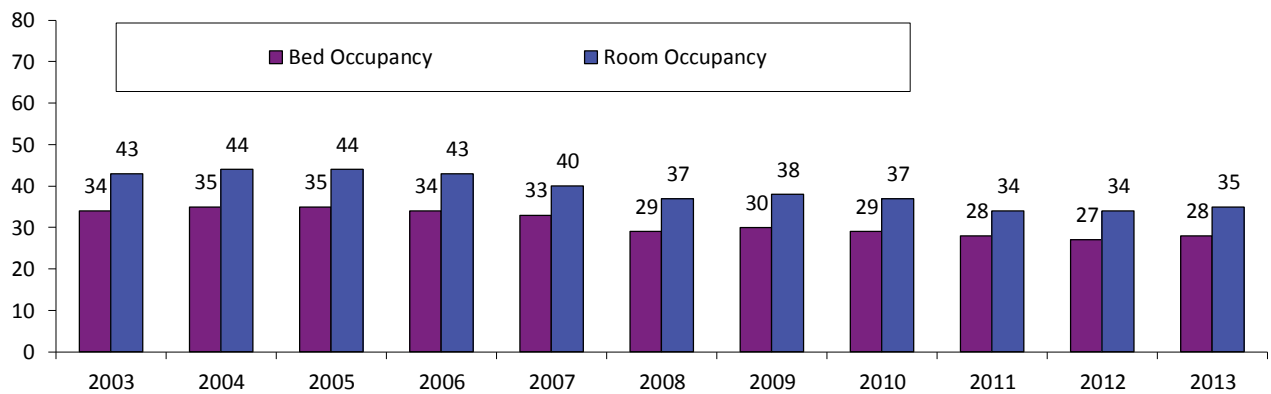
4 Guest Houses/ B&Bs

This section presents the monthly and annual average bed and room occupancy levels for Guest Houses/ B&Bs. Details of the survey methodology are available in a separate technical appendix.

4.1 Annual Average Bed and Room Occupancy

The annual average occupancy rates for Guest Houses/ B&Bs across Wales have shown a relative amount of consistency over the last three years. The annual average bed occupancy rate has been in the range 27%-28% while the annual average room occupancy rate has been either 34% or 35%.

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

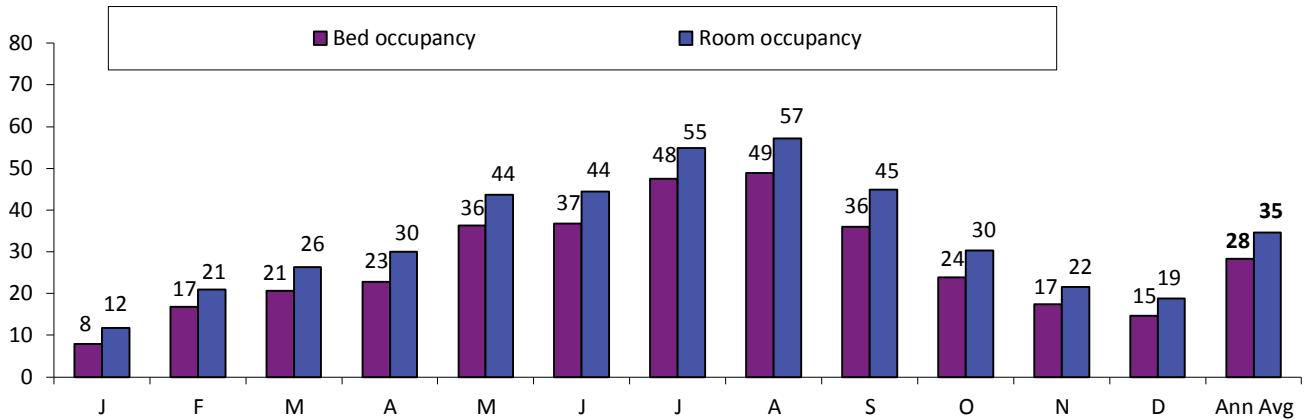


The 2013 annual averages represent a small increase on the 2012 figures, however, these have yet to return to the levels recorded prior to 2011. The highest rates recorded over the past ten years were recorded in 2004 and 2005 where the annual bed occupancy rates were 35% and the annual room occupancy rates were 44%.

4.2 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 - 2013 (%)



As in previous years, the seasonality of the Guest House/ B&B sector in Wales remains evident in 2013. The average bed occupancy rate began the year at 8% in January before rising to a peak of 49% in August and ending the year with a rate of 15% in December 2013. The average room occupancy rate also followed a similar pattern, rising from 12% in January to 57% in August and then decreasing to 19% in December.

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

	Room occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
January	21	22	26	17	19	18	17	15	13	14	12
February	27	27	29	27	27	26	25	24	19	19	21
March	30	29	36	28	29	30	27	27	24	28	26
April	45	44	40	42	40	34	38	38	39	36	30
May	52	49	49	52	49	46	45	42	41	42	44
June	50	57	56	57	50	45	48	50	49	48	44
July	61	64	63	65	54	54	54	53	50	49	55
August	72	73	72	71	66	59	59	57	59	53	57
September	54	56	59	56	51	47	51	50	45	48	45
October	39	43	41	43	39	38	39	39	29	32	30
November	30	28	24	28	27	25	25	25	19	20	22
December	24	25	20	27	19	21	21	18	13	13	19
Annual Average	43	44	44	43	40	37	38	37	34	34	35

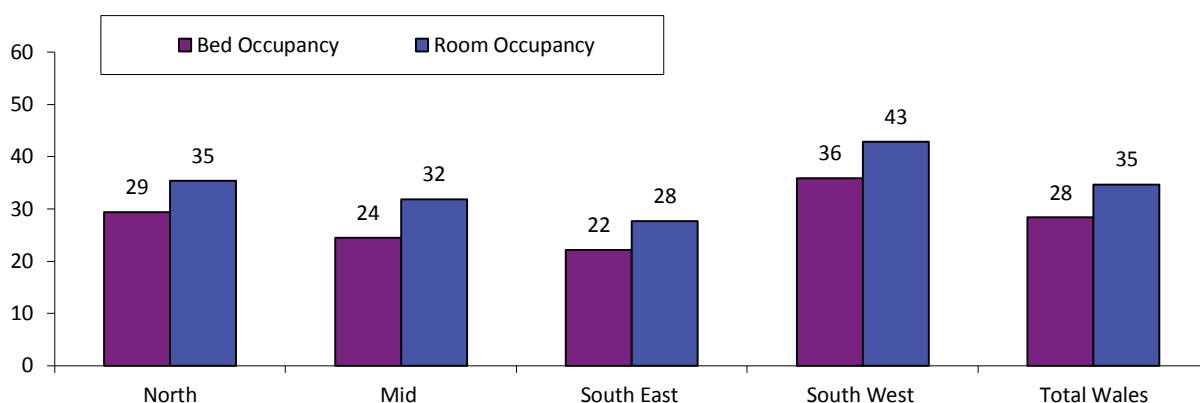
Decreases were recorded for several months in the first half of 2013 when compared to 2012 (as shown in Table 4-1 on previous page), particularly in April where the 2013 rate was six percentage points lower than in 2012 (likely to have been influenced by the timing of Easter). However, increases were recorded in the key summer months of July and August where the average room occupancy rates were six and four percentage points higher respectively than in 2012. There was also a positive end to 2013. At 19%, the December 2013 room occupancy rate was six percentage points higher than the 2012 rate of 13%.

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

4.3 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 2013. 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 – 2013 (%)



As in previous years, the annual average bed and room occupancy rates were highest in South West Wales where averages of 36% and 43% respectively were recorded for establishments in this region. This contrasts with the South East where the annual average bed occupancy rate was 22% and an annual average room occupancy rate of 28% was recorded in 2013.

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

	Room occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Wales	40	42	44	43	41	35	39	39	35	31	35
Mid Wales	33	33	34	33	33	29	33	32	34	32	32
South East Wales	52	52	51	49	46	43	40	38	25	31	28
South West Wales	46	48	47	48	43	43	39	39	37	40	43
<i>Total Wales</i>	43	44	44	43	40	37	38	37	34	34	35

As shown in Table 4-2, the annual average room occupancy rate in South West Wales has rise over the last three years from 37% in 2011 (the lowest rate recorded for this region since 2003) to 43%, a rate equal to those recorded in 2007 and 2008. Rates for the South East have shown an overall decline, with an annual average room occupancy rate of 52% recorded in 2003 compared to 28% in 2013.

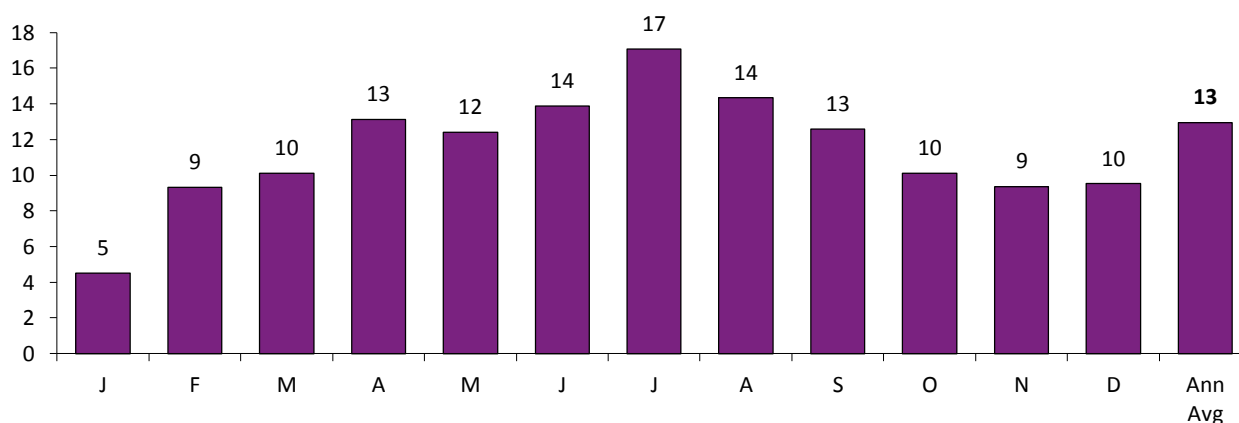
The annual average room occupancy rate for Mid Wales held at 32% in 2013 (equal to 2012), while an increase of four percentage points was recorded for the annual average room occupancy rate in the North Wales region (31% in 2012 to 35% in 2013).

4.4 Percentage of Overseas Guests

As described in the previous section, in 2008 there was a minor change in the way that data was collected for overseas guests, with the forms updated to make them more focused 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 2013 results.

Figure 4-4 - Guest Houses/B&Bs - Percentage of Overseas Bednights - 2013 (%)



April to September were the months when the highest averages for overseas bednights were recorded in 2013, with the peak rate recorded in July (17%). With the exception of the low rate recorded in January 2013 (5%), the proportion of overseas bednights demonstrated a high degree of consistency in the shoulder months (in the range 9%-10%).

Table 4-3 - Guest Houses/B&Bs - Trends in Percentage of Overseas Bednights

	Room occupancy					
	2008	2009	2010	2011	2012	2013
January	10	13	10	5	11	5
February	5	9	7	7	12	9
March	9	6	7	5	9	10
April	11	8	10	10	10	13
May	12	9	12	11	12	12
June	12	14	11	12	13	14
July	21	17	15	16	17	17
August	15	14	12	12	13	14
September	13	9	12	10	11	13
October	7	10	10	9	6	10
November	5	7	11	7	6	9
December	8	9	16	3	6	10
<i>Annual average</i>	<i>12</i>	<i>11</i>	<i>12</i>	<i>11</i>	<i>11</i>	<i>13</i>

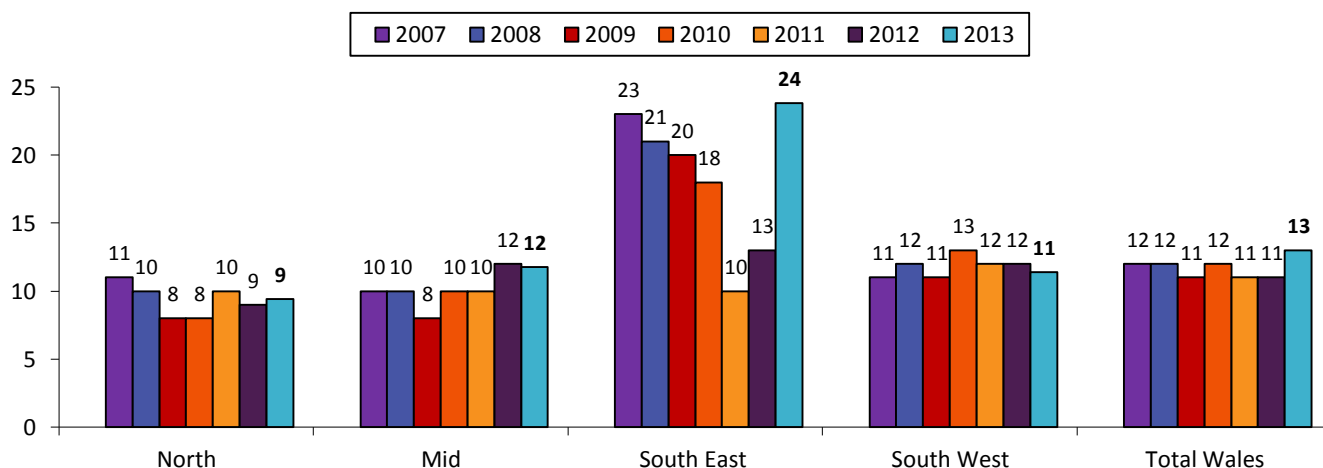
Over the past six years, the percentage of overseas bednights has shown a fair degree of consistency, particularly during the spring/ summer months. January, however, has shown greater variation over the last few years ranging from 10% in 2010 to 5% in 2011 before rising to 11% in 2012 and falling again to 5% in 2013.

The percentages recorded for final quarter of 2013 show a more encouraging picture. Rates for the months of October, November and December were all higher than those recorded in both 2011 and 2012 (with a small increase for October compared to 2011). The increases recorded

for the month of December have been the most marked with a rate of 3% in 2010 compared to 10% in 2013.

While the overall annual average percentage of overseas bednights has been relatively consistent over the past seven years, the rates for some of the regions have been more variable, as shown in Figure 4-5 below.

Figure 4-5 - Guest Houses/B&Bs - Percentage of Overseas Guests by Region 2007 - 2013 (%)

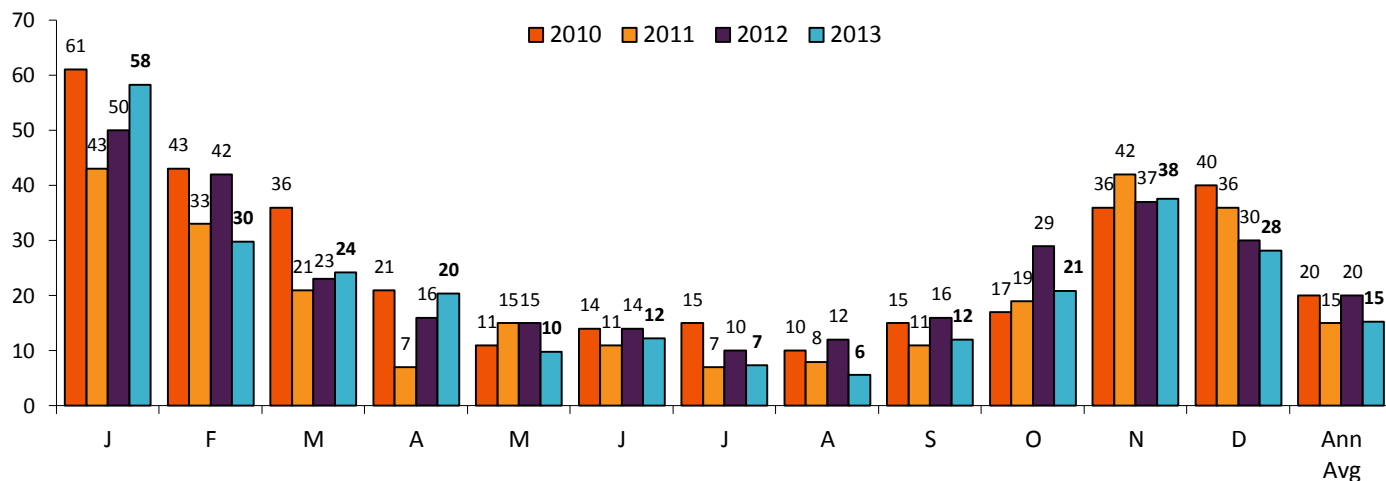


The greatest degree of variation over the years has been recorded for the South East region, particularly over the last four years. In 2010 a rate of 18% was recorded for this region, which then fell to 10% in 2011 (due to a decline in both response rates and occupancy levels reported). The percentage of overseas guests then rose to 13% in 2012 before increasing by eleven percentage points in 2013 to 24%.

4.5 Percentage of Business Guests

Guest house and B&B operators were asked to record the number of guests staying for business purposes. Please note that not all participants provided us with this information.

Figure 4-6 - Guest Houses/B&Bs - Percentage of Business Guests – 2010 - 2013 (%)

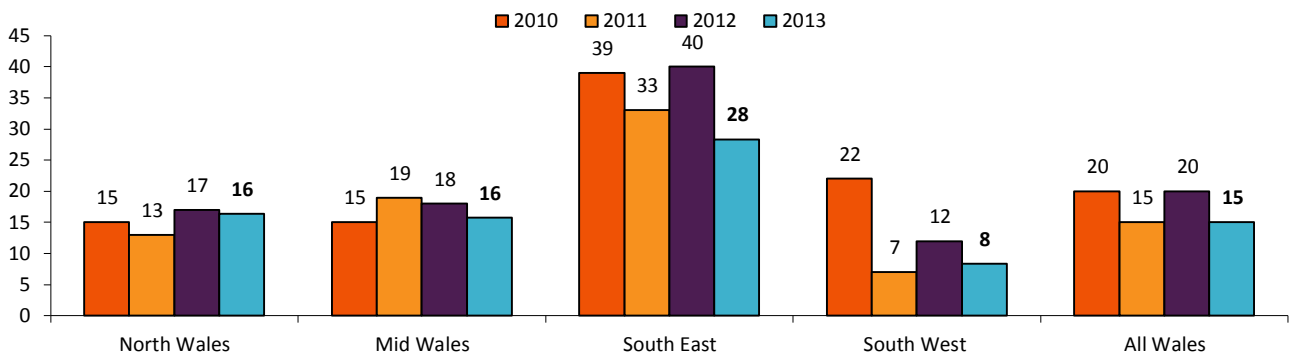


The annual average for business occupancy in the GH/B&B sector in Wales has been somewhat variable over the last few years, alternating between 20% and 15% (the latter being recorded in 2013). As shown in Figure 4-6 (above), this overall variation covers some even larger variations when analysed on a monthly basis.

While the January 2013 average business occupancy rate is similar to that recorded in 2010 (58% and 61% respectively), it represents an eight percentage point increase on the 2012 rate of 50% and an even larger increase when compared to 2011 (43%). Business occupancy rates for this sector across Wales in December have been in decline since 2010 where a rate of 40% was recorded compared to 28% in 2013.

Figure 4-7 (overleaf) shows the percentage of business guests for the individual regions from 2010-2013. Again, please note that not all participants supplied this information, therefore, results are more variable than overall occupancy rates.

Figure 4-7 - Guest Houses/B&Bs - Annual Average Percentage of Business Guests by Region 2010- 2013 (%)



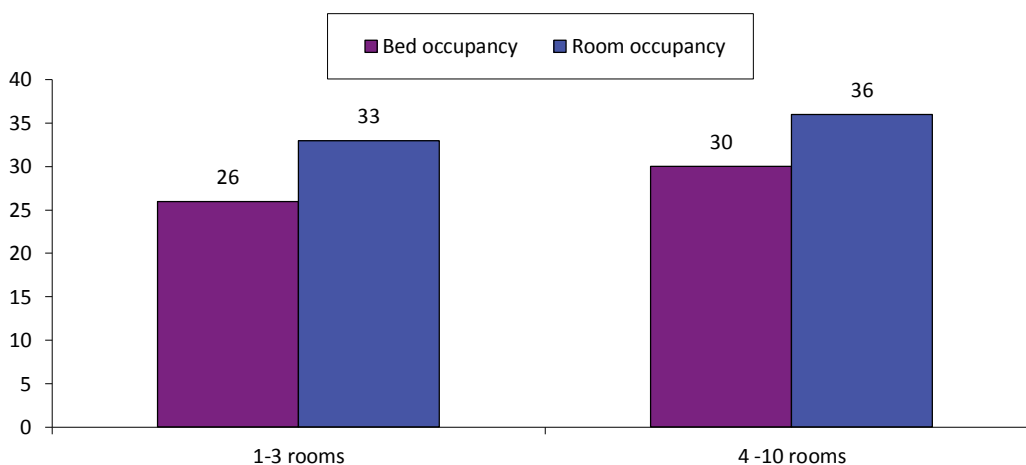
The annual average percentages of business guests have been relatively consistent over the past four years in North and Mid Wales. However, regions in the South of Wales have shown greater variation over this time period. In the South West, a decrease of fifteen percentage points was recorded in 2011, with subsequent years recording rates of 12% (2012) and 8% (2013). In the South East, there was a decrease of twelve percentage points recorded in 2013, with the rate for this year (28%) the lowest recorded for this region since 2010.

4.6 Occupancy by Size

Due to the small sample size in many of the larger size categories, occupancy rates are only presented for two categories of Guest Houses / B&Bs: 1-3 rooms and 4-10 rooms.

The monthly average bed and room occupancy figures by size of Guest Houses/ B&Bs are presented in Appendix 2b and 2c.

Figure 4-8 - Guest Houses/B&Bs - Annual Occupancy by Size of Guest House/B&Bs - 2013 (%)



As shown in Figure 4-8 on the previous page, both the annual average bed and room occupancy rates were higher in 2013 for larger establishments. An annual average bed occupancy rate of 30% and an annual average room occupancy rate of 36% were recorded for Guest Houses/ B&Bs with 4-10 rooms compared to rates of 26% and 33% respectively for those with 1-3 rooms.

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

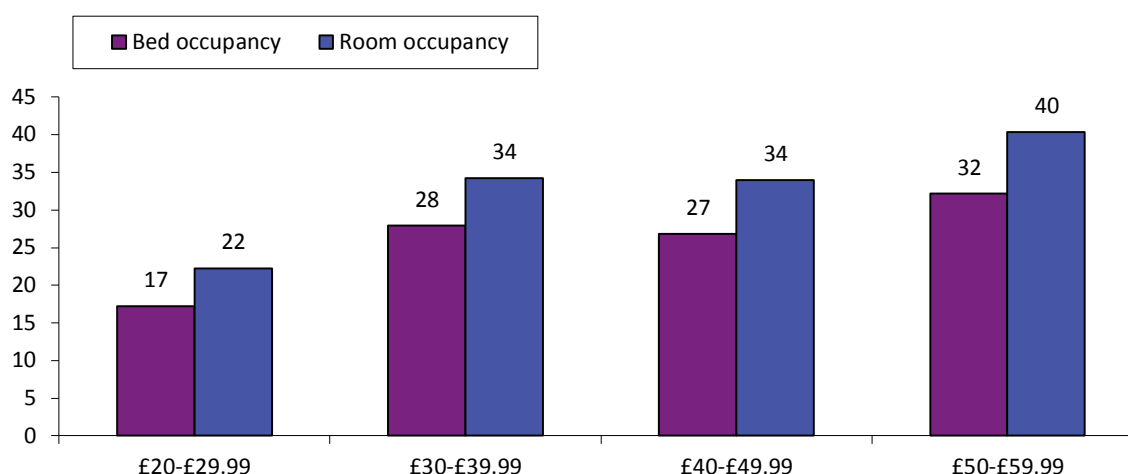
	Annual Average Room Occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
1-3 rooms	34	36	36	34	33	31	30	32	27	29	33
4-10 rooms	45	48	48	47	47	40	43	40	37	36	36

While the annual average room occupancy rate was higher for establishments with 4-10 rooms, it was smaller establishments who recorded an increase (to 33% from 29% in 2012). Rates for those with 1-3 rooms have risen over the past three years from 27% to 33%, while the rate for larger establishments has been more consistent (in the range 36%-37%) over this period of time.

4.7 Occupancy by Tariff

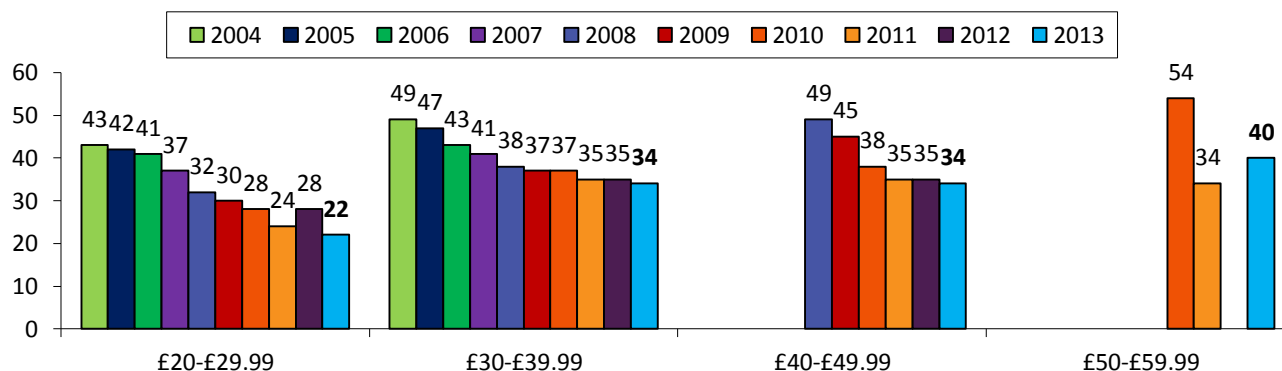
As in the hotel survey, the tariff figures used in the survey relate to the amount charged per person for a double or twin room, including breakfast. The monthly bed and room occupancy levels for each of the tariff categories used in the analysis are detailed in Appendix 2b and 2c of the report. It should 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 £60 or more.

Figure 4-9 - Guest Houses/B&Bs - Annual Occupancy by Tariff of Guest House/B&B – 2013 (%)



The annual average occupancy rates shown in Figure 4-9 (previous page) show a general correlation between tariff and occupancy rates, at least for the top and bottom tariff bands. Establishments charging £20-£29.99 recorded an annual average bed occupancy rate of 17% and an annual average room occupancy rate of 22% in 2013, which compares to 32% and 40% respectively for those charging £50-£59.99. The rates for the middle two tariff bands in 2013 were similar to each other.

Figure 4-10 - Guest Houses/B&Bs - Trends in Annual Room Occupancy Rates by Tariff of Guest Houses/B&Bs (%)

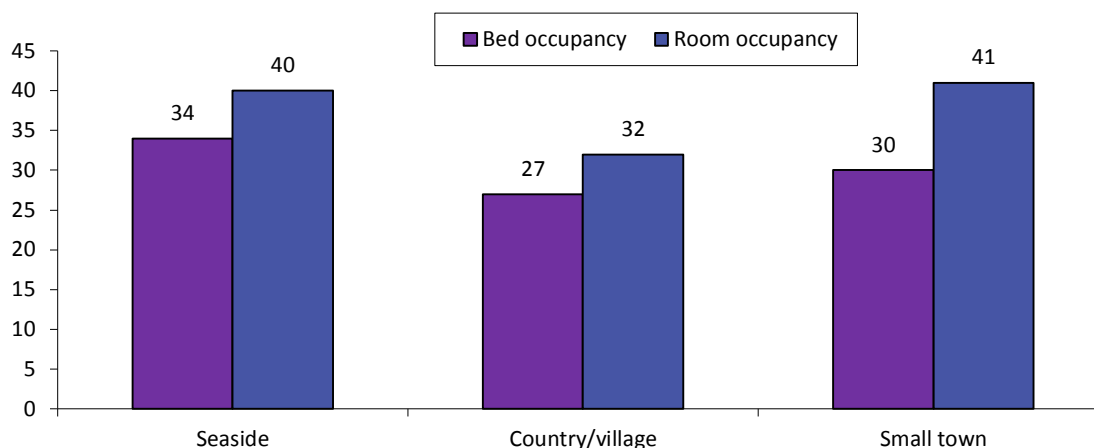


Annual average room occupancy rates have shown a general decline since 2004 for each of the tariff bands. However, over the past three years, the rates for those charging £30-£39.99 and £40-£49.99 have been the most consistent – both in the range 34%-35%. Sample sizes for establishments charging £50-£59.99 have not always been large enough to allow the analysis to be presented, however, between 2011 and 2013 establishments in this tariff band recorded an increase of six percentage points in their annual average room occupancy rate.

4.8 Occupancy by Location

Occupancy rates were analysed according to the location of the Guest House/ B&Bs - 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.

Figure 4-11 - Guest Houses/ B&Bs - Annual Occupancy by Location of Guest House/B&B – 2013 (%)



The highest annual average bed occupancy rate in 2013 was recorded for establishments in seaside areas (34%) while those in country/ village locations recorded an annual average of 27% and those in small towns a rate of 30%. The annual average room occupancy rates for establishments in seaside and small towns were similar (40% and 41% respectively), while those in country/village locations recorded a lower average of 32% in 2013.

Table 4-5 - Guest Houses/B&Bs - Trends in Annual Room Occupancy Rates by Location of Guest House/B&B (%)

	Annual Average Room Occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
City/ large town	70	63	64	67	64	57	54	42	*	45	*
Small town	39	38	42	41	40	38	40	37	44	43	41
Seaside	44	46	47	47	46	44	42	46	42	36	40
Country/village	40	41	41	40	36	33	33	34	30	31	32

* sample size too small to present data

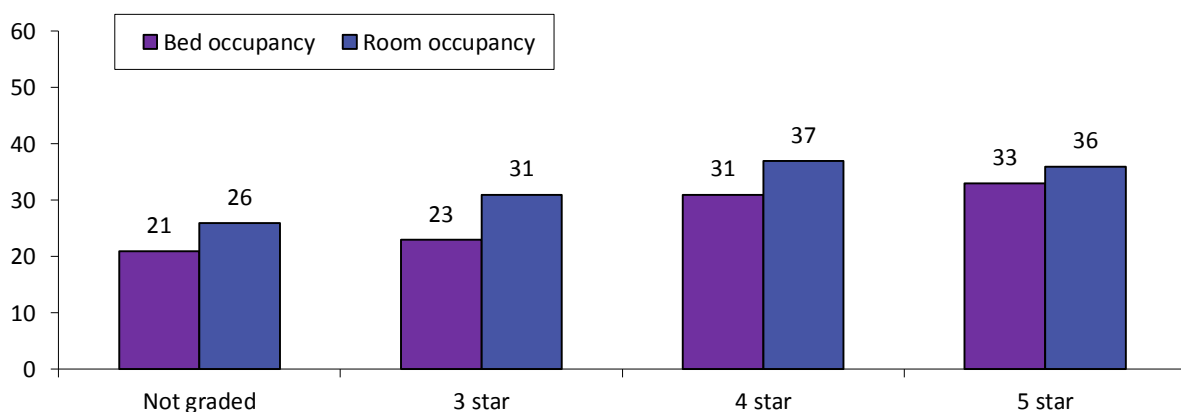
Following decreases between 2010 and 2012 (from 46% to 36%), the annual average room occupancy rate for Guest Houses/ B&Bs in seaside areas rose in 2013 to 40%. Since 2008, the annual average room occupancy rate for establishments in country/ village locations has been the most consistent (in the range 30%-34%).

4.9 Occupancy by Grading

As with hotels, occupancy rates for Guest House/ B&Bs were analysed according to their grading under the Star Grading Scheme administered by Visit Wales

Figure 4-12 overleaf presents annual bed and room occupancy figures by grading for 2013. Due to the small sample size of establishments with 1 or 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.

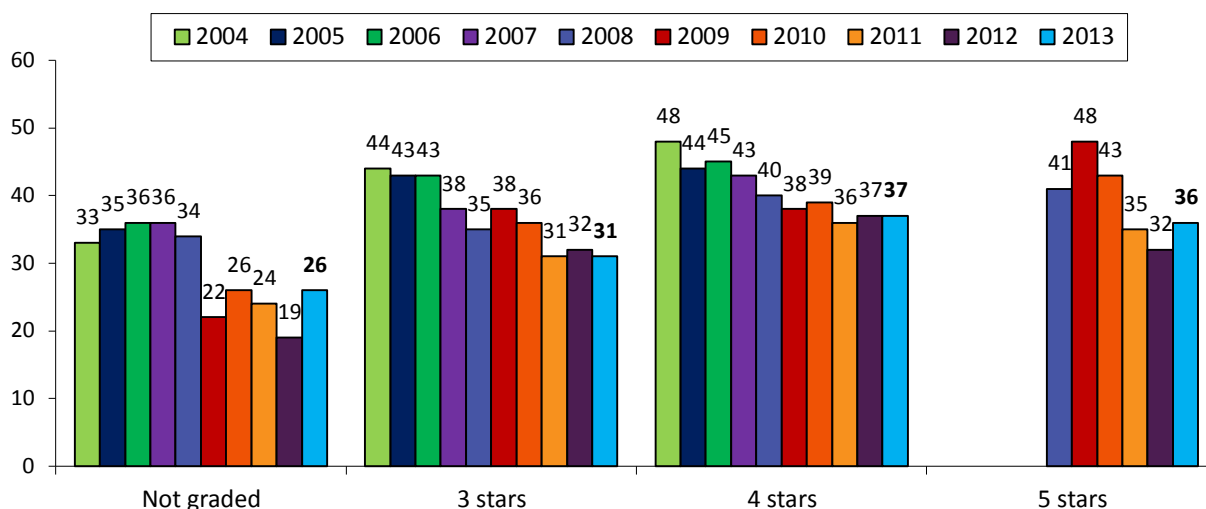
Figure 4-12 - Guest Houses/B&Bs - Occupancy by Grading of Guest House/B&B - 2013 (%)



As in previous years, a correlation between grading and occupancy levels was recorded in 2013. Guest Houses/ B&Bs that were not graded recorded an annual bed occupancy rate of 21% and an annual room occupancy rate of 26%, both of which are lower than those recorded for graded establishments.

Within the Visit Wales grading scheme, the annual average bed occupancy rates for 2013 increased in correlation with the number of stars that establishments in each category had been awarded. 3 star establishments recorded an annual bed occupancy average of 23% compared to 36% for those with a 5 star grading.

Figure 4-13 - Guest Houses/ B&Bs - Trends in Annual Room Occupancy Rates by Grading (%)



While graded establishments recorded the highest annual average room occupancy rates, it was non-graded establishments in 2013 who recorded the largest increase when compared to 2012. The annual average room occupancy rate of 26% for these establishments in 2013 was seven percentage points higher than the 2012 rate of 19%, returning to the same level as that recorded in 2010.

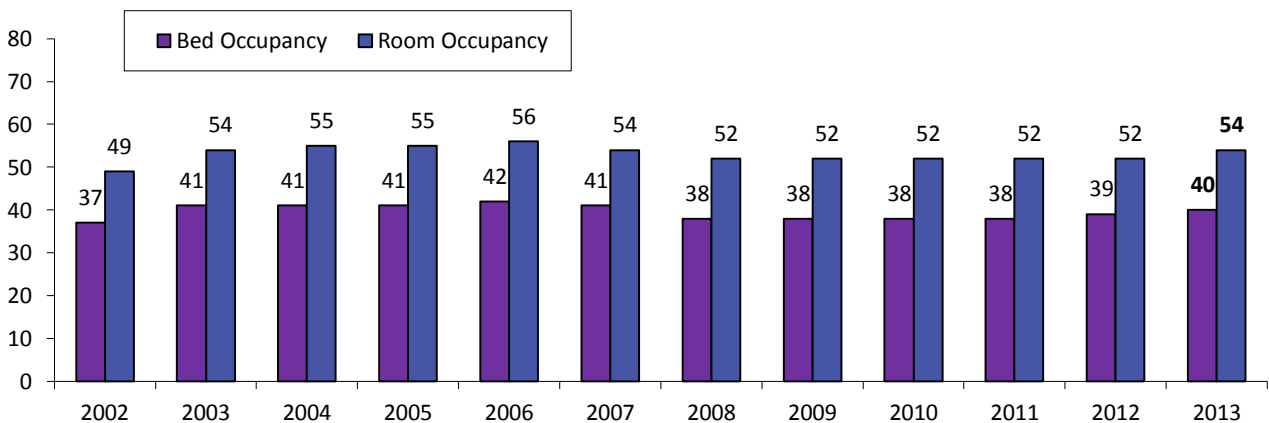
5 All Serviced Accommodation

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/ B&Bs.

5.1 Average Bed and Room Occupancy

The annual average bed occupancy rate for all serviced accommodation across Wales in 2013 was 40%, while the annual average room occupancy rate was 54%.

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

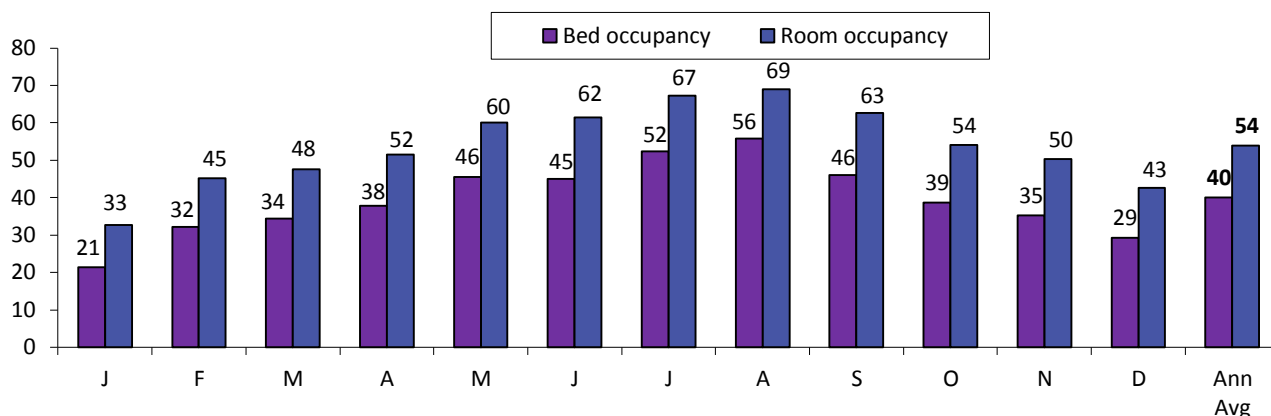


Following a four year period in which a rate of 38% was recorded for annual average bed occupancy (2008 to 2011), this rate has risen by a small amount over the past two years to 40% in 2013. The annual average room occupancy rate has also demonstrated a great degree of consistency over recent years with a rate of 52% recorded each year between 2008 and 2012, with a slight increase in 2013 to 54%.

5.2 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 – Serviced Accommodation - Monthly Bed & Room Occupancy - 2013 (%)



As mentioned for both the Hotel and Guest House/B&B sectors separately, the seasonality of serviced accommodation remained evident in 2013. The average bed and room occupancy rates peaked in August 2013 when rates of 56% and 69% respectively were recorded. Lower levels were recorded outside of the main summer seas with the lowest averages recorded in January 2013 (21% and 33% respectively).

5.3 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 bednights (based on total bednights).

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 2013 results (overleaf).

Table 5-1 – Serviced Accommodation - All Serviced Accommodation - Percentage of Overseas Bednights – 2008 - 2013 (%)

	Room occupancy					
	2008	2009	2010	2011	2012	2013
January	5	7	6	6	6	4
February	3	6	5	5	4	4
March	5	5	5	5	5	5
April	6	5	6	6	5	7
May	8	6	8	8	7	8
June	8	8	8	8	6	9
July	11	10	10	10	10	12
August	8	8	8	8	9	10
September	10	6	8	6	7	9
October	5	6	7	5	4	6
November	7	5	7	5	3	3
December	4	4	7	3	4	7
<i>Annual average</i>	7	7	7	7	6	8

The annual average percentage of overseas guests has shown a high degree of consistency over the years, with the rates recorded between 2008 and 2013 in the range 6%-8%. During this time period, there have been variations recorded by month, however. In 2013, increases were recorded for a number of months when compared with 2012, particularly in June (three percentage points). March is the only month where the percentage of overseas guests has remained at the same level throughout the 2008 – 2013 period (5%).

6 Self-catering Cottages & 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.

6.1 Monthly Unit Occupancy

Table 6-1 below presents annual unit occupancy rates for 2008 to 2013 across both independent and agency operators.

Table 6-1 - Self-catering - Cottages and Apartments ALL (%)

	Average Unit Occupancy					
	2008	2009	2010	2011	2012	2013
January	24	20	17	29	32	28
February	37	43	34	42	41	36
March	39	41	37	38	45	43
April	48	51	49	63	55	46
May	54	55	53	65	48	59
June	57	56	60	65	65	56
July	64	67	67	71	68	68
August	81	75	81	85	81	82
September	62	61	60	72	64	65
October	50	45	31	55	50	53
November	25	22	22	31	36	30
December	36	48	35	32	38	33
<i>May – October average</i>	<i>61</i>	<i>60</i>	<i>59</i>	<i>69</i>	<i>63</i>	<i>64</i>
<i>Annual average</i>	<i>48</i>	<i>50</i>	<i>45</i>	<i>54</i>	<i>53</i>	<i>50</i>

As with the serviced sectors, self-catering accommodation also continued to demonstrate seasonality in the average unit occupancy rates recorded for each month in 2013. A unit

occupancy rate of 28% was recorded in January which rose to a peak of 82% in August before falling to 30% in November and 33% in December.

There were several variations in the rates recorded when compared with 2012. An increase of eleven percentage points was recorded in the May 2013, while decreases of nine percentage points were recorded for the months either side of May (April and June). Longer term, the average unit occupancy rate for August was the highest recorded since 2008.

The annual average unit occupancy rate was 50%, three percentage points lower than in 2012 and equal to that recorded in 2009.

Table 6-2 below presents the annual 2013 occupancy rates for independent operators. As described earlier in the report, data from 2007 to 2012 has also been provided to illustrate trends over several years.

Table 6-2 - Self-catering - Cottages and Apartments - Independent (%)

	Average Unit Occupancy						
	2007	2008	2009	2010	2011	2012	2013
January	22	23	24	22	24	22	26
February	40	40	39	34	39	32	36
March	43	43	37	36	32	31	36
April	54	48	55	56	62	53	47
May	69	61	62	58	60	46	53
June	76	67	70	67	59	62	53
July	86	76	80	73	69	67	64
August	93	87	88	86	87	79	78
September	73	69	72	67	69	62	59
October	60	52	55	49	48	47	47
November	32	26	27	27	25	32	25
December	39	42	36	34	30	31	32
<i>May – October average</i>	<i>76</i>	<i>69</i>	<i>71</i>	<i>67</i>	<i>65</i>	<i>61</i>	<i>59</i>
<i>Annual average</i>	<i>57</i>	<i>53</i>	<i>54</i>	<i>51</i>	<i>50</i>	<i>49</i>	<i>46</i>

The annual average unit occupancy rate for independently let properties across Wales was 46%. This decrease from 49% in 2012 continued the decline in this rate that has been evident since 2009. A number of increases by month were recorded during the first quarter of 2013 compared to 2012 – four percentage points in January and February followed by a five percentage point increase in March. However, decreases were recorded for a number of key summer months, most notably June where the 2013 rate of 53% was nine percentage points lower than the 2012 rate of 62% and the lowest recorded since 2007.

Table 6-3 overleaf presents annual occupancy figures for self-catering accommodation let by agencies for 2008 to 2013. As noted previously, occupancy data for these types of self-catering properties is not available for 2007.

Table 6-3 - Self-catering - Cottages and Apartments - Agency (%)

	Average Unit Occupancy					
	2008	2009	2010	2011	2012	2013
January	24	16	13	34	41	30
February	36	45	35	46	48	35
March	35	44	39	44	57	56
April	47	49	44	64	58	46
May	51	52	49	69	52	68
June	51	43	56	70	70	61
July	59	54	64	73	69	73
August	78	63	78	84	83	87
September	58	51	56	75	68	74
October	44	36	21	62	56	63
November	23	17	20	40	42	40
December	29	57	38	34	50	35
<i>May – October average</i>	<i>57</i>	<i>50</i>	<i>54</i>	<i>72</i>	<i>66</i>	<i>71</i>
<i>Annual average</i>	<i>45</i>	<i>44</i>	<i>43</i>	<i>58</i>	<i>58</i>	<i>57</i>

Agency let properties have recorded relatively stable annual average unit occupancy rates in recent years. Between 2011 and 2013, the annual average unit occupancy rate has been in the range 57%-58%. However, greater variations have been recorded on a monthly basis. The average unit occupancy rate recorded for August 2013 (87%) was the highest rate recorded for this month since 2008. Following a large increase in 2012 (sixteen percentage points to 50%), a decrease of fifteen percentage points was recorded in the average unit occupancy rate for December with the 2013 rate of 35% very close to that recorded in December 2011 (34%).

The May to October average unit occupancy rate rose in 2013 to 71%, a similar figure to that recorded in 2011 (72%) and five percentage points higher than in 2012, demonstrating the importance of this period.

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.

6.2 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 - Self-catering - North Wales – Independent (%)

	Average Unit Occupancy						
	2007	2008	2009	2010	2011	2012	2013
January	25	25	31	23	31	25	35
February	45	42	40	44	42	36	41
March	42	45	38	39	31	38	39
April	59	47	53	61	62	57	53
May	73	61	71	68	68	58	64
June	83	70	74	73	62	69	62
July	90	76	85	78	72	65	71
August	92	85	88	86	87	81	86
September	77	72	82	73	75	61	63
October	63	52	68	57	55	47	56
November	37	25	38	31	24	34	26
December	40	38	38	36	30	28	33
<i>May – October average</i>	<i>80</i>	<i>69</i>	<i>78</i>	<i>72</i>	<i>70</i>	<i>64</i>	<i>67</i>
<i>Annual average</i>	<i>61</i>	<i>53</i>	<i>59</i>	<i>56</i>	<i>53</i>	<i>49</i>	<i>51</i>

Table 6-5 - Self-catering - North Wales 2008 – 2013 – ALL (%)

	Average Unit Occupancy					
	2008	2009	2010	2011	2012	2013
January	21	29	23	33	35	30
February	41	38	44	45	40	37
March	36	38	42	42	45	52
April	49	58	61	63	58	47
May	49	66	67	69	53	67
June	56	70	69	69	69	61
July	59	81	74	73	68	73
August	68	89	85	85	83	88
September	56	77	75	75	68	72
October	48	60	58	60	55	61
November	23	38	36	35	41	38
December	32	44	37	33	47	35
<i>May – October average</i>	<i>56</i>	<i>74</i>	<i>71</i>	<i>72</i>	<i>66</i>	<i>71</i>
<i>Annual average</i>	<i>45</i>	<i>57</i>	<i>56</i>	<i>57</i>	<i>56</i>	<i>55</i>

Since 2011, the annual average unit occupancy rate for all properties in North Wales has shown a small but steady decline, falling from 57% to 55%. However, the 2013 rate remains higher than the rate of 45% which was recorded for these properties in 2007. The May to October average unit occupancy rate was five percentage points higher in 2013 than in 2012 (71% and 66% respectively) and at a similar level to 2010 (71%) and 2011 (72%). This figure received a boost in 2013 from increases such as those recorded in May (fourteen percentage points), July (five percentage points) and August (five percentage points).

The year ended on a slightly less positive note with a decrease of twelve percentage points in the December 2013 figure (47% to 35%), which followed an increase of fourteen percentage points between December 2011 (33%) and the same month in 2012 (47%).

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 - Self-catering - Mid Wales 2007 – 2013 – Independent (%)

	Average Unit Occupancy						
	2007	2008	2009	2010	2011	2012	2013
January	24	25	16	16	18	18	19
February	41	40	40	27	38	33	31
March	42	41	40	38	28	31	35
April	48	53	59	60	65	55	43
May	59	66	64	58	56	46	51
June	70	63	70	66	61	63	54
July	85	78	81	74	70	74	65
August	93	89	91	88	91	86	82
September	73	68	70	66	71	66	62
October	61	54	54	44	51	46	43
November	24	27	23	27	28	29	23
December	35	46	31	37	34	32	23
<i>May – October average</i>	<i>74</i>	<i>70</i>	<i>72</i>	<i>66</i>	<i>67</i>	<i>64</i>	<i>60</i>
<i>Annual average</i>	<i>55</i>	<i>54</i>	<i>53</i>	<i>50</i>	<i>51</i>	<i>48</i>	<i>44</i>

Table 6-7 - Self-catering - Mid Wales 2008 – 2013 - ALL (%)

	Average Unit Occupancy					
	2008	2009	2010	2011	2012	2013
January	6	12	12	18	18	21
February	18	51	32	38	32	31
March	32	47	38	28	31	39
April	46	38	44	65	55	44
May	63	38	47	56	46	54
June	65	39	55	61	66	55
July	61	50	64	70	73	65
August	84	60	78	91	86	82
September	68	46	52	71	65	63
October	54	33	16	51	47	46
November	27	13	18	28	30	23
December	46	54	37	34	32	23
<i>May – October average</i>	<i>66</i>	<i>44</i>	<i>52</i>	<i>67</i>	<i>64</i>	<i>61</i>
<i>Annual average</i>	<i>48</i>	<i>43</i>	<i>41</i>	<i>51</i>	<i>49</i>	<i>46</i>

In contrast to some of the other regions, the increases recorded in the monthly average unit occupancy for properties in Mid Wales were recorded in the first half of 2013. An increase of eight percentage points was recorded in March 2013 compared to 2012 (rates of 39% and 31% respectively) with the same size increase recorded in May 2013 (46% to 54%). However, these increases were offset by some sizeable decreases later in the year, such as a decrease of eleven percentage points in June, a decrease of eight percentage points in July and a nine percentage point decrease in December (to 23%, the lowest average recorded for this month since 2008).

Both the May to October and annual average unit occupancy rates have shown decreases each year for the past two years, falling from 67% to 61% and 51% to 46% respectively.

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 - Self-catering - South East Wales 2008 – 2013 - Independent (%)

	Average Unit Occupancy					
	2008	2009	2010	2011	2012	2013
January	25	28	54	37	43	40
February	56	28	52	45	54	46
March	47	29	32	36	66	52
April	57	54	53	54	52	52
May	64	46	53	56	53	60
June	63	68	58	56	63	56
July	77	83	67	67	74	66
August	89	83	75	74	73	71
September	75	67	54	57	66	56
October	73	58	57	45	70	66
November	49	38	40	32	46	38
December	63	59	57	38	42	46
<i>May – October average</i>	<i>73</i>	<i>67</i>	<i>61</i>	<i>59</i>	<i>67</i>	<i>62</i>
<i>Annual average</i>	<i>61</i>	<i>53</i>	<i>55</i>	<i>50</i>	<i>57</i>	<i>54</i>

In 2013, the May to October average unit occupancy rate decreased for properties in South East Wales by slightly more than the annual average (decreases of five and three percentage points respectively). While the average unit occupancy rate rose by seven percentage points in May 2013 (from 53% to 60%), decreases of seven, eight and ten percentage points were recorded in June, July and September respectively. An increase of four percentage points was recorded in December 2013, with this rate (46%) continuing the increases recorded for this month since 2011.

It should be noted that no data was available for self-catering properties let by agencies in the South East region during 2013 and variations in sample sizes influenced occupancy rates. 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.

Table 6-9 - Self-catering - South West Wales 2007 – 2013 - Independent (%)

	Average Unit Occupancy						
	2007	2008	2009	2010	2011	2012	2013
January	13	16	20	16	17	22	23
February	33	32	40	25	34	28	32
March	43	40	36	32	34	29	28
April	51	44	56	50	61	50	47
May	70	58	53	52	59	40	48
June	73	64	67	64	58	60	48
July	84	74	73	70	66	61	62
August	96	90	86	87	87	77	76
September	70	64	65	65	67	58	58
October	55	44	44	45	41	39	40
November	28	22	17	20	21	25	22
December	34	39	29	24	24	23	29
<i>May – October average</i>	-	66	65	64	63	56	56
<i>Annual average</i>	54	49	49	46	48	46	44

Despite some sizeable monthly average differences between 2012 and 2013 the May to October average for Independent properties in South West Wales remained level at 56%. There was a slight decrease in the annual average unit occupancy rate in 2013, which continued the decline noted in recent years – from 48% in 2011 to 46% in 2012 and 44% in 2013.

On a monthly basis, the largest decrease was recorded for June where a rate of 48% was recorded in 2013, a twelve percentage point decrease on the 2012 rate of 60% and the lowest average recorded for this month since 2007. There were increases recorded for some months in 2013, with the largest in May (eight percentage points) and December (six percentage points).

It should be noted that no data was available for self-catering properties let by agencies in South West Wales during 2013. 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.

6.3 Occupancy by Location

Occupancy data was analysed for properties in coastal and inland locations. Tables 6-10 and 6-11 (overleaf) illustrate the average occupancy rates for 2013 for independently operators along with trended 2007 to 2012 data.

Table 6-10 - Self-catering - Monthly Unit Occupancy by Coastal Location - Independent (%)

	Coastal locations						
	Unit Occupancy (%)						
	2007	2008	2009	2010	2011	2012	2013
January	20	21	25	23	28	21	18
February	40	44	44	32	44	22	43
March	47	47	40	39	39	29	33
April	60	55	51	58	66	51	43
May	74	67	70	60	71	44	56
June	83	72	76	72	70	67	49
July	90	78	85	81	78	65	69
August	95	93	95	93	92	78	87
September	78	72	79	77	77	60	64
October	62	49	58	58	55	31	40
November	29	23	21	25	25	24	17
December	36	42	34	29	29	21	22
<i>Annual Average</i>	<i>60</i>	<i>55</i>	<i>57</i>	<i>54</i>	<i>56</i>	<i>45</i>	<i>46</i>

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

	Inland locations						
	Unit Occupancy (%)						
	2007	2008	2009	2010	2011	2012	2013
January	24	22	19	22	21	23	27
February	40	40	35	30	36	35	35
March	37	41	33	33	29	32	37
April	45	50	58	52	59	54	48
May	61	63	55	52	56	47	53
June	66	64	67	61	55	62	54
July	79	77	76	68	64	68	63
August	91	89	86	84	84	80	76
September	65	69	66	60	65	63	58
October	56	55	49	43	45	52	49
November	38	29	24	25	25	34	27
December	44	44	36	34	30	32	34
<i>Annual Average</i>	<i>54</i>	<i>54</i>	<i>50</i>	<i>47</i>	<i>47</i>	<i>50</i>	<i>47</i>

The annual average unit occupancy rates for independent self-catering properties in Wales were very similar in 2013 for properties located in coastal and those located in inland areas

(46% and 47% respectively). Prior to 2012, units in coastal areas recorded higher annual average unit occupancy rates than inland properties. The annual average for properties in inland locations decreased in 2013 by three percentage points to 47%, the same rate as the figures recorded in 2010 and 2011. The annual average unit occupancy rate for coastal properties in 2013 (46%) was very similar to the 2012 rate for these properties (45%), although both of these figures are lower than the rates recorded prior to 2012.

With the exception of June, increases were recorded for independently let coastal properties in each month during the May to October period. The largest of these was recorded for May where an increase of twelve percentage points was recorded in 2013 (to 56%), although this rate remains lower than those recorded between 2007 and 2012. Following a decrease in 2012, the February 2013 rate increased to 43%, to a similar rate to those recorded in 2008, 2009 and 2011.

For independently let inland properties, 2013 generally had a better start than 2012, with increases recorded in January (four percentage points), March (five percentage points) and May (six percentage points). However, decreases were recorded each month from June to November, with the largest recorded in November where the rate fell from 34% to 27%, returning to a similar level as those recorded in 2010 and 2011.

Tables 6-12 and 6-13 (below and overleaf) illustrate the average occupancy rates for 2013 for independently operators along with trended 2007 to 2012 data.

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

	Coastal locations					
	Unit Occupancy (%)					
	2008	2009	2010	2011	2012	2013
January	21	24	23	28	39	26
February	44	43	33	44	46	39
March	47	40	39	39	54	45
April	55	51	58	66	57	46
May	66	70	60	71	50	69
June	72	76	72	70	71	60
July	78	85	81	78	71	75
August	93	95	93	92	83	89
September	72	79	77	77	68	72
October	49	58	58	55	48	55
November	23	21	25	25	33	30
December	42	34	29	29	38	34
<i>Annual Average</i>	55	56	54	56	55	54

Table 6-13 - Self-catering - Monthly Unit Occupancy by Inland Location - ALL (%)

	Inland locations					
	Unit Occupancy (%)					
	2008	2009	2010	2011	2012	2013
January	24	21	23	24	28	28
February	41	36	34	41	38	35
March	42	35	36	36	39	43
April	49	60	55	61	54	47
May	60	60	56	63	48	56
June	64	67	62	62	64	55
July	74	76	69	70	67	65
August	86	87	83	82	80	79
September	67	69	63	67	63	62
October	50	50	45	47	52	52
November	24	28	28	29	37	30
December	39	41	35	31	38	33
<i>Annual Average</i>	<i>52</i>	<i>52</i>	<i>49</i>	<i>51</i>	<i>52</i>	<i>49</i>

The annual average unit occupancy rates for both coastal and inland properties (irrespective of letting means) have shown a fair degree of consistency over the past six years. The annual average for all coastal properties has been in the range 54% to 56%, while the range for inland properties has been 49% to 52%.

May was a month in which occupancy rates rose for properties in both locations but particularly so for coastal locations. Here the 2013 rate of 69% was nineteen percentage points higher than the 2012 rate of 50%. Coastal properties also recorded increases for July (four percentage points) and August (six 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.

6.4 Occupancy by Tariff

The annual average unit occupancy rates by tariff are presented in Table 6-14 below. Monthly unit occupancy rates for tariff analysed by independent/agency operators are detailed in Appendix 3a of the report.

Table 6-14 - Self-catering - Average Monthly Unit Occupancy by Tariff (%)

	Tariff			
	Unit Occupancy (%)			
	<£299.99	£300 -£499.99	£500 -£799.99	£800+
January	28	20	*	*
February	32	35	*	26
March	33	35	42	16
April	52	51	26	39
May	76	50	60	39
June	62	55	66	28
July	88	66	67	52
August	*	72	86	81
September	70	66	70	33
October	43	50	62	43
November	23	31	26	19
December	21	33	37	29
<i>Annual Average</i>	38	47	58	43

*=sample <5

While there was a clearer correlation between tariff band and the annual average unit occupancy rate in 2012, data for those charging £800 or more was not available for that year due to the sample size. There were sufficient properties in the sample to analyse the data for this group, which has resulted in less of a clear pattern in terms of occupancy rates and tariff bands.

In 2013, it was properties charging £500-£799.99 that recorded the highest annual average unit occupancy rate (58%) while those charging less than £299.99 recorded an annual average of 38%. When analysed on a monthly basis, however, this pattern was not as clear, with properties in the lowest tariff bands recording the highest average unit occupancy rates in May and July.

6.5 Occupancy by grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Table 6-15 below shows the annual average unit occupancy rates by grade.

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.

Table 6-15 - Self-catering - Average Monthly Unit Occupancy by Grading (%)

	Star Grading				
	2 Star	3 Star	4 Star	5 Star	Not graded
January	27	25	27	19	36
February	35	28	34	34	54
March	31	37	38	45	57
April	41	42	49	55	53
May	57	57	53	67	55
June	56	45	55	66	63
July	75	64	64	70	73
August	67	77	76	89	80
September	63	57	60	71	59
October	55	39	49	56	55
November	21	25	25	27	33
December	11	31	34	36	33
<i>Annual Average</i>	<i>45</i>	<i>45</i>	<i>47</i>	<i>52</i>	<i>54</i>

Within the Visit Wales grading scheme, there was a general correlation between star grading and the annual average unit occupancy rate, as there has been for a number of previous years. Properties with a 2 or 3 star grading recorded an annual average of 45% each, while rates of 47% and 52% were recorded for those with a 4 and 5 star grading respectively.

The clearest correlation between star grading and the average unit occupancy rate was recorded for the month of December where 2 star properties recorded an average unit occupancy rate of 11% compared to 36% for 5 star properties.

The annual average unit occupancy rate was highest for ungraded properties in 2013, as was the case in 2012. The monthly averages tended to be higher than graded properties outside of the main summer season, particularly at the start of the year where rates of 36% and 54% were recorded for ungraded properties for January and February respectively.

7 Caravan Holiday Homes

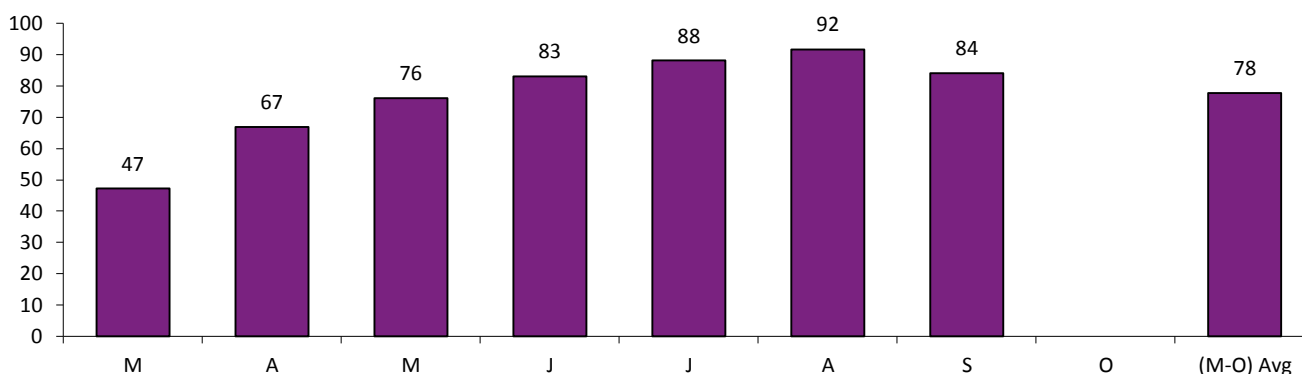
This section presents the information collected from operators offering static caravans (and/or chalets) for let. Occupancy is measured by relating the number of units let during the reporting period to the total number available for let during that time.

Please note that due to the small sample sizes in a number of categories, analysis by grading and also for sites located in inland areas has not been presented in this report. In addition, an operator with a large sample of caravan holiday homes did not provide data for October. Results for this month have not been presented due to the variation in sample.

7.1 Monthly Unit Occupancy

Figure 7-1 below presents the monthly occupancy rates for caravan holiday homes in 2013.

Figure 7-1 – Caravan Holiday Homes - Monthly Unit Occupancy – Caravan Holiday Homes – 2013 (%)

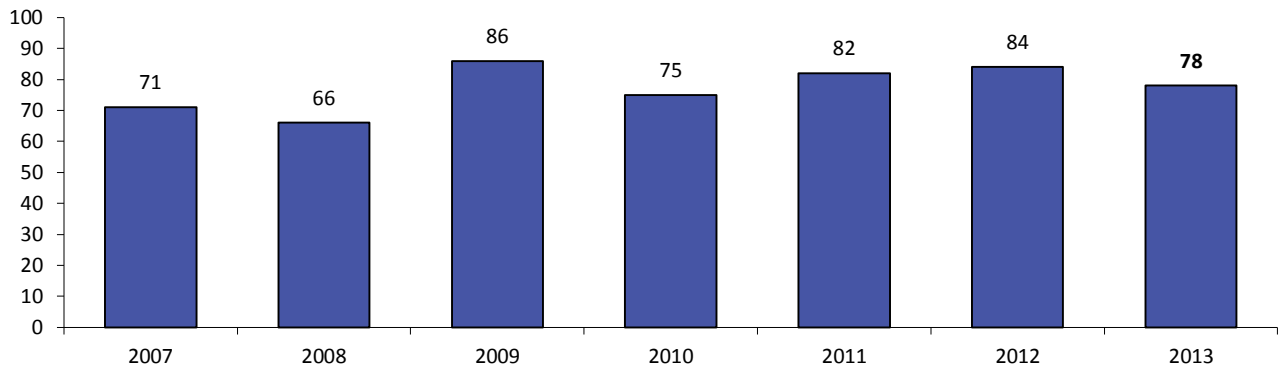


The timing of the Easter period has been particularly influential on occupancy rates for Caravan Holiday Homes over the years and in 2013, the Easter weekend fell at the end of March/ the very beginning of April. A corresponding increase was recorded in the average pitch occupancy rate which rose from 47% in March to 67% in April 2013. The highest monthly average was recorded for the month of August (92%).

An operator with a large sample of caravan holiday homes did not provide data for October. Results for this month have not been presented due to the variation in sample.

Figure 7-2 below presents the occupancy rates for 2007 to 2013 for caravan holiday homes.

Figure 7-2 –Caravan Holiday Homes – Seasonal averages 2007 - 2013 (%)



The seasonal average for Caravan Holiday Homes has shown some variation over the past seven years, with the largest variation between 2008 (66%) and 2009 (86%). The 2013 average of 78% represents a six percentage point decrease from 84% in 2012 but remains higher than several previous years.

Table 7-16 –Caravan Holiday Homes – Monthly Unit Occupancy ALL

All locations								
Unit Occupancy (%)								
	2006	2007	2008	2009	2010	2011	2012	2013
March	*	*	*	52	33	19	42	47
April	62	56	45	72	79	80	80	67
May	57	67	60	81	78	79	80	76
June	58	71	71	85	84	80	86	83
July	70	65	73	86	83	86	86	88
August	88	90	87	96	91	93	85	92
September	72	77	71	88	64	85	91	84
October	56	55	37	82	47	69	77	*
May to October Average	67	71	66	86	75	82	84	78

In 2013, Easter fell in late March/ early April. This period had the greatest impact in March 2013 where an increase of five percentage points was recorded from the 2012 average unit occupancy rate for this month (47% and 42% respectively). While increases were recorded between 2012 and 2013 for the key summer months of July and August (two and seven percentage points respectively), a thirteen percentage point decrease was recorded in April 2013 (from 80% in 2012 to 67% in 2013).

7.2 Occupancy by Location

Table 7-17 –Caravan Holiday Homes – Monthly Unit Occupancy by Coastal Location (%)

	Coastal locations							
	Unit Occupancy (%)							
	2006	2007	2008	2009	2010	2011	2012	2013
March	*	*	*	56	37	19	44	48
April	62	57	52	74	81	84	84	69
May	57	67	63	83	81	83	86	79
June	58	73	74	88	87	83	90	86
July	70	66	75	89	85	88	89	90
August	90	92	84	94	91	93	87	94
September	93	80	73	90	64	87	93	90
October	58	56	36	85	46	70	79	*
May to October Average	68	72	68	88	76	84	87	81

*Data not presented due to sample variation between years

Reflecting the variation in seasonal averages at the overall level, rates for Caravan Holiday Homes in coastal locations have shown a fair degree of variation over the past eight years. While there was a decrease of six percentage points in this rate in 2013 (81% from 87% in 2012), this rate remains the third highest recorded for this sector since 2006.

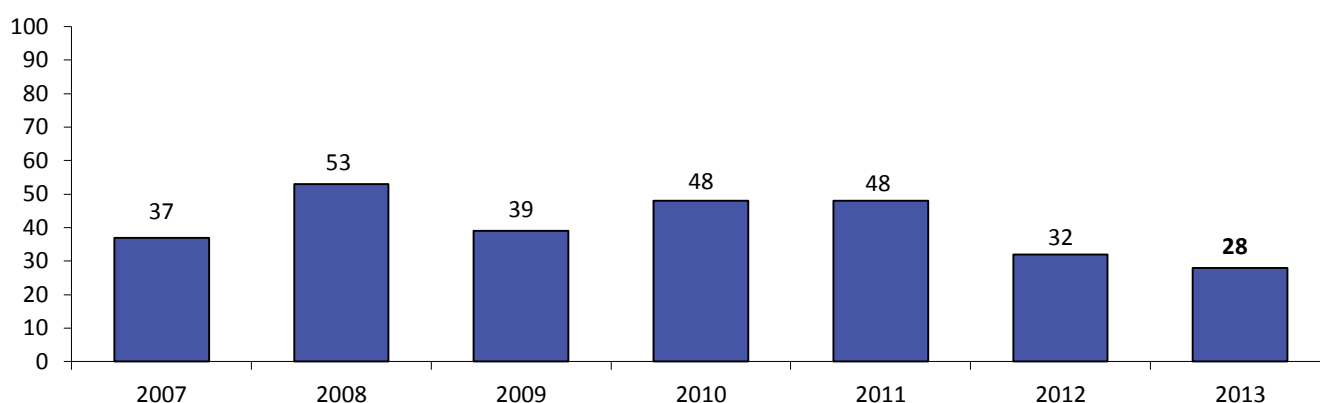
8 Touring Caravan & Camping Parks

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.

8.1 Monthly Unit Occupancy

Figure 8-1 below presents seasonal occupancy rates between 2007 and 2013 for touring caravan and camping parks. 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 –Touring – Seasonal Average Pitch Occupancy 2007 – 2013 (%)



The May to October seasonal average has shown some variation over the years influenced, in part, by sample variations over time. The 2013 rate of 28% is four percentage points lower than the seasonal average recorded in 2012 (32%), however, this represents less of a decrease than that recorded between 2011 and 2012 (sixteen percentage points).

Please note that the relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data. In addition, a participant with a large number of sites did not provide data after 2011, which should be borne in mind when comparing averages between years

Table 8-1 overleaf shows the monthly data for the past eight years, however, as mentioned previously, monthly variations have not been commented on and should be treated with caution.

Table 8-1 –Touring – Monthly Unit Occupancy ALL (%)

	All locations Unit Occupancy (%)							
	2006	2007	2008	2009	2010	2011	2012	2013
March	*	*	*	12	9	11	9	12
April	29	28	24	27	24	41	18	13
May	29	34	52	35	36	41	20	26
June	37	34	51	35	47	49	33	27
July	53	42	61	45	60	59	39	42
August	67	62	73	61	69	65	52	49
September	27	31	44	32	45	42	25	24
October	16	18	37	25	33	30	14	15
May to October Average	38	37	53	39	48	48	32	28

* Sample to small for analysis

8.2 Occupancy by Location

Occupancy data was analysed for touring caravan and camping parks located in coastal and inland locations. Tables 8-2 and 8-3 below and overleaf illustrate occupancy rates for touring caravan and camping parks in 2013 along with trended historical data.

Table 8-2 –Touring – Monthly Unit Occupancy by Coastal Location (%)

	Coastal locations Unit Occupancy (%)							
	2006	2007	2008	2009	2010	2011	2012	2013
March	*	*	*	9	10	8	14	14
April	32	28	21	25	26	28	21	14
May	32	37	50	40	31	26	21	30
June	40	37	47	41	49	36	36	27
July	61	46	60	61	51	48	47	51
August	76	72	76	80	70	66	65	65
September	29	33	36	38	37	29	25	24
October	15	17	42	22	21	13	19	15
May to October Average	42	40	52	47	43	36	37	33

* Sample to small for analysis

Table 8-3 –Touring – Monthly Unit Occupancy by Inland Location (%)

	Inland locations Unit Occupancy (%)							
	2006	2007	2008	2009	2010	2011	2012	2013
March	*	*	*	15	6	14	6	12
April	24	28	30	22	22	47	17	13
May	24	29	56	29	36	49	20	24
June	30	30	59	26	39	56	31	27
July	36	34	62	28	64	64	32	37
August	44	45	68	38	68	64	41	41
September	23	28	48	19	48	49	24	23
October	16	21	37	18	38	36	9	15
May to October Average	29	31	55	26	49	53	27	26

Over the years, the seasonal averages for inland locations have shown greater variation than those recorded by sites in coastal locations. However, the variation in the seasonal averages for inland sites was minimal between 2012 and 2013 (27% to 26%) while those in coastal locations recorded a decrease of four percentage points between 2012 and 2013 (37% to 33%).

Please note that the sample sizes for these areas are low so these results should be interpreted with caution. In addition, a participant with a large number of sites did not provide data after 2011. The relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data.

8.3 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 8-4 below shows the annual average unit occupancy rates by grading and monthly occupancy rates by grade. Please note that no sites in this year's survey had a one star or a five star grading.

Table 8-4 –Touring – Average Monthly Unit Occupancy by Grading (%)

	Star Grading Unit Occupancy (%)		
	2-3 stars	4 stars	Not graded
March	24	5	*
April	30	9	7
May	38	24	19
June	38	23	13
July	52	48	18
August	61	58	28
September	27	26	18
October	25	10	11
May – Oct Average	37	28	18

* Sample too small for analysis

As in 2012, within the Visit Wales grading scheme, it was sites with the lower star gradings that recorded the highest May to October average in 2013. Sites with a 2 or 3 star grading recorded a seasonal average of 37% compared to 28% for those with a 4 star grading. The lowest seasonal average for 2013 was recorded for sites that were not graded, with a rate of 18% recorded for these properties.

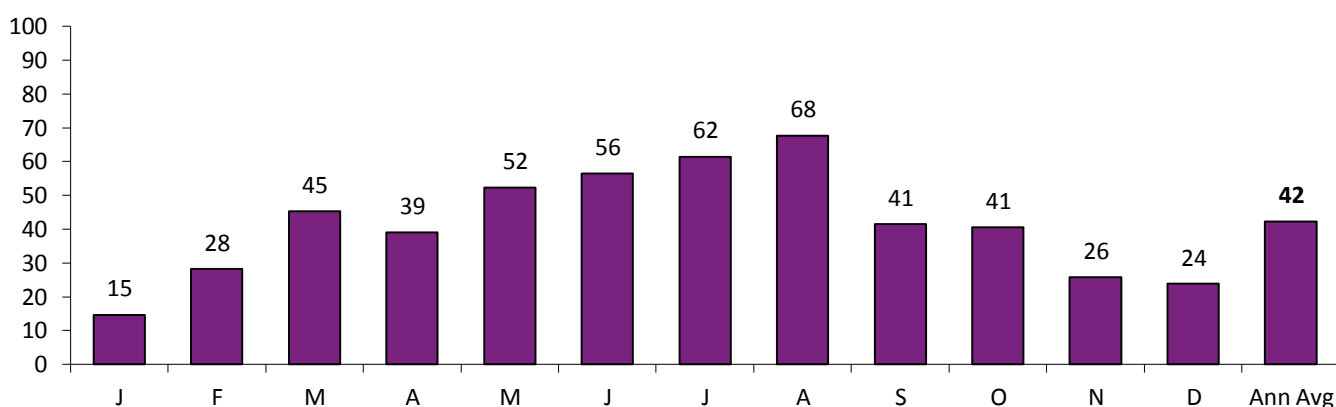
The relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data.

9 Hostels & Bunkhouses

9.1 Monthly Bed Occupancy

Figure 9-1 below presents the monthly and annual bed occupancy for hostels and bunkhouses across Wales in 2013.

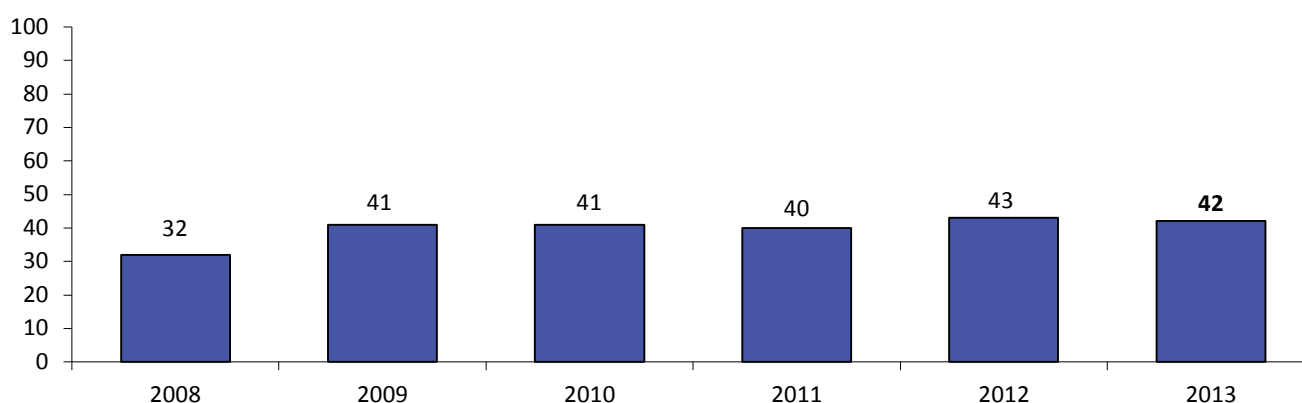
Figure 9-1 – Hostels & Bunkhouses - Monthly Bed & Room Occupancy - 2013 (%)



The annual average bed occupancy rate for Hostels and Bunkhouses was 42% in 2013. When analysed by month, the established pattern of seasonality was again evident with a rate of 15% recorded in January which rose to a peak of 68% in August before falling to 24% in December.

The average bed occupancy rate rose sharply between February and March (from 28% to 45%), possibly due to the timing of the Easter holiday period which fell in late March/ early April in 2013. There was also a sizeable decrease in the average occupancy rate recorded in September (41%) when compared to the August rate (68%).

Figure 9-2 – Hostels & Bunkhouses - Annual Average Bed Occupancy –2008-2013 (%)



Since 2009, there has been a fair degree of consistency in the annual average bed occupancy rate recorded for Hostels and Bunkhouses. The 2013 rate of 42% is very close to that recorded in 2012 (43%).

Table 9-1 - Hostels – Monthly average bed occupancy (%)

	Average Bed Occupancy					
	2008	2009	2010	2011	2012	2013
January	15	17	14	16	14	15
February	23	27	27	28	29	28
March	29	34	32	28	39	45
April	37	49	48	54	50	39
May	48	52	50	50	46	52
June	52	53	55	53	64	56
July	50	68	64	62	65	62
August	50	60	66	61	67	68
September	30	40	44	42	43	41
October	34	43	41	39	42	41
November	12	23	24	22	26	26
December	8	22	23	23	26	24
<i>Annual average</i>	32	41	41	40	43	42

The timing of the Easter period (late March/ early April) had a positive impact on the averaged bed occupancy rate in March 2013 with an increase of six percentage points on the 2012 rate of (39% to 45%). However, a decrease of eleven percentage points was recorded in April (50% in 2012 to 39% in 2013). For most other months, the 2013 rates were similar to the previous year, with the exception of May where an increase of six percentage points was recorded.

9.2 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 2013, 198 forms were received with overseas data (55%).

Table 9-2 - Hostels - Percentage of Overseas Bednights (%)

	Percentage of overseas bednights					
	2008	2009	2010	2011	2012	2013
January	23	28	17	31	14	18
February	11	10	21	21	16	10
March	12	17	10	12	17	13
April	10	12	9	10	9	12
May	11	11	13	10	10	11
June	6	14	9	9	8	11
July	21	21	18	21	17	19
August	13	14	14	14	13	15
September	19	13	11	11	15	13
October	12	7	13	12	12	11
November	16	18	14	7	13	23
December	13	16	16	19	12	20
<i>Annual average</i>	<i>14</i>	<i>15</i>	<i>14</i>	<i>15</i>	<i>13</i>	<i>14</i>

Throughout the years there has been a fair degree of variation in the percentage of overseas bednights when analysed by month while the annual average bed occupancy rate has remained relatively consistent (in the range 13% to 15%).

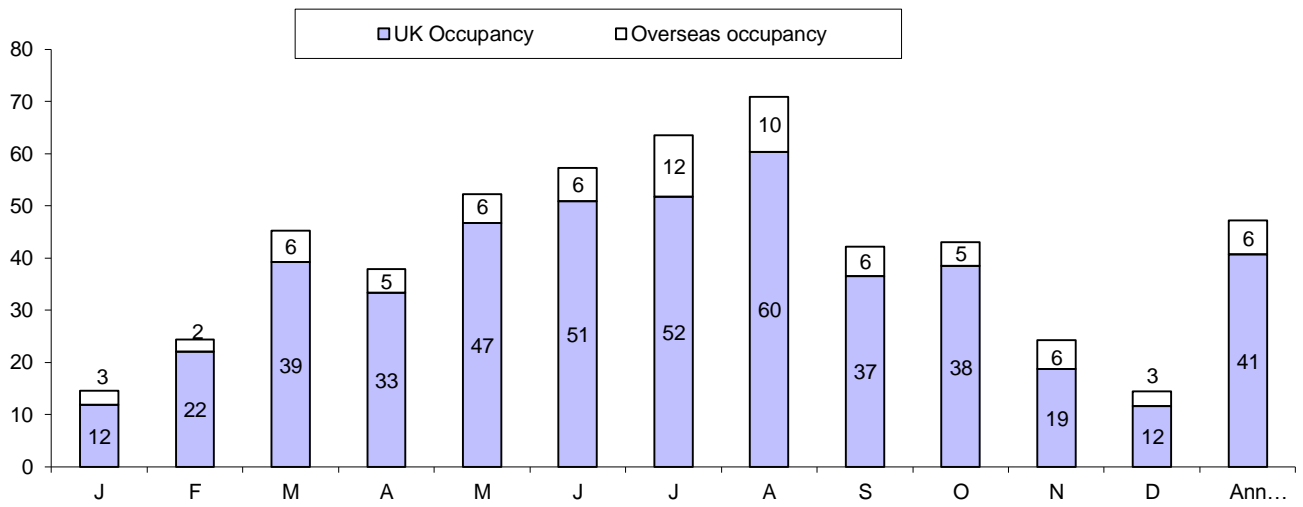
Between 2012 and 2013, decreases were recorded for February and March (six and four percentage points respectively). The year ended positively, however, with an increase of ten percentage points recorded for the November overseas bednights rate between 2012 and 2013, while the December rate rose from 12% in 2012 to 20% in 2013.

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 (overleaf) shows the monthly average bed occupancy rates for UK guests and Overseas guests. It should be noted that not all establishments provided a split by origin.

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

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



As in previous years, the UK monthly average bed occupancy rates were higher than overseas bednights for all months, with the largest difference recorded in August (50 percentage points). The annual average bed occupancy rate for UK guests was 41% compared to a rate of 6% for overseas bednights.

Please note that overseas bed occupancy refers to the number of overseas bednights as a percentage of the total number of bedspaces available.

9.3 Occupancy by Location

Occupancy data was analysed for hostels in coastal and inland locations. Table 9-3 below illustrates occupancy rates for hostels in the two locations.

Table 9-3 - Hostels & Bunkhouses- Monthly Bed Occupancy by Location Hostels and Bunkhouses (%)

	Coastal locations	Inland locations
	Bed Occupancy (%)	Bed Occupancy (%)
January	13	16
February	27	29
March	46	45
April	32	44
May	54	51
June	54	58
July	63	60
August	72	64
September	41	42
October	37	44
November	19	32
December	22	26
May-Oct Average	54	54
Annual Average	41	43

Establishments located in coastal and inland locations recorded equal May to October averages in 2013 (54% each), with a slightly higher annual average for those located in inland areas compared to coastal locations (41% and 41% respectively).

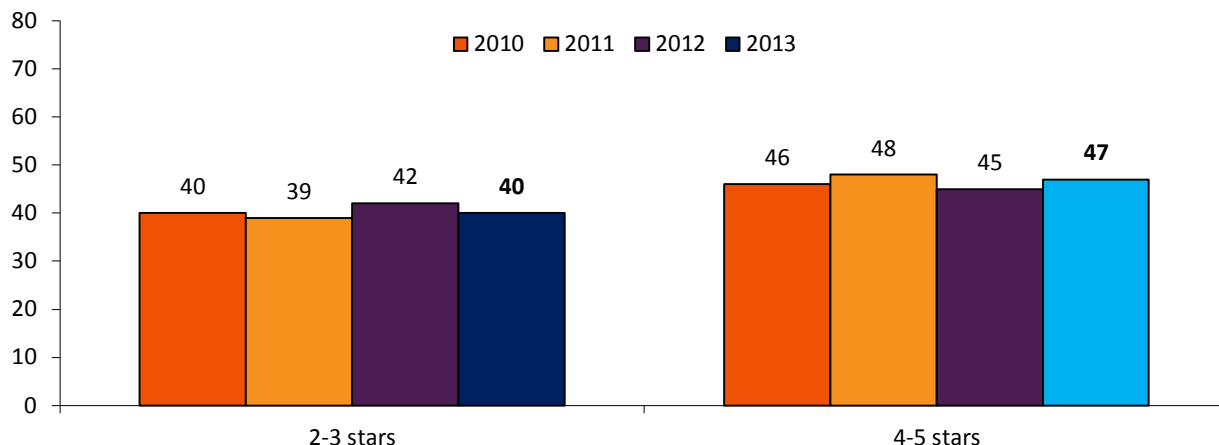
Coastal establishments recorded higher average bed occupancy rates in the key summer months of July and August (63% and 72% respectively), while inland establishments recorded higher rates for a number of the shoulder months in 2013.

Please note that the sample is low and so this should be taken into account when analysing the results.

9.4 Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Figure 9-4 below shows the annual average unit occupancy rates by grade.

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



As in previous years, there continued to be a positive relationship between the level of grading and occupancy level for the Hostels and Bunkhouses sector in 2013. Establishments with a 4-5 star grading recorded an annual average occupancy rate of 47% compared to a rate of 40% for those graded with 2 or 3 stars. Hostels and Bunkhouses in the higher grading band recorded a slight increase in their annual average unit occupancy (2 percentage points from 45% 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										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
January	25	24	25	24	26	25	26	26	27	26	27
February	33	33	33	35	35	34	33	35	35	34	38
March	36	36	37	35	37	38	34	36	38	42	40
April	43	41	41	44	44	40	42	45	45	44	44
May	48	48	46	49	50	49	46	47	46	45	49
June	47	48	49	50	51	47	48	50	49	50	48
July	52	53	52	56	53	52	52	54	50	50	54
August	59	56	56	60	60	55	56	57	52	58	59
September	50	51	51	55	54	51	50	52	49	54	50
October	43	42	42	45	45	45	45	45	45	45	44
November	34	35	34	37	38	38	36	35	38	37	42
December	31	33	32	34	34	33	34	29	31	37	35
Annual Average	42	42	42	44	44	43	42	43	42	44	45

Appendix 1b – Hotels: Bed Occupancy 2013 (%)

	2013 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	27	38	40	44	49	48	54	59	50	44	42	35	45
North Wales	28	44	43	51	55	54	59	67	55	46	44	34	49
Mid Wales	24	34	38	41	48	44	52	54	47	42	31	27	41
South East Wales	29	39	40	42	46	46	51	51	45	45	48	38	43
South West Wales	18	30	36	39	46	46	54	61	51	39	29	31	41
1-3 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
4-10 rooms	26	31	34	34	51	50	56	63	49	39	34	35	43
11-25 rooms	22	42	40	42	49	44	51	59	48	38	40	30	42
26-50 rooms	27	40	41	47	49	49	56	59	51	44	39	33	45
51-100 rooms	26	41	42	45	50	51	61	64	55	54	43	37	47
Over 100 rooms	31	37	41	48	49	48	50	51	48	42	50	38	45
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	16	26	35	39	48	46	49	49	45	35	37	*	39
£40-£49.99	15	23	37	41	43	34	42	51	47	34	42	30	37
£50-£59.99	28	42	39	51	51	50	56	59	50	46	42	29	45
£60 & over	29	41	41	45	50	50	56	61	51	46	43	37	46
Not graded	27	33	36	40	50	44	50	53	42	36	44	36	42
1 star	-	-	-	-	-	-	-	-	-	-	-	-	-
2 stars	36	41	43	44	46	52	53	55	50	45	46	*	47
3 stars	22	36	38	43	47	45	54	60	50	42	37	31	42
4 stars	30	41	43	47	50	51	54	57	51	49	43	36	46
5 stars	40	51	51	51	58	63	67	73	65	59	52	39	57
City/large town	31	39	40	45	47	48	51	52	47	44	49	39	44
Countryside/village	25	34	36	39	50	46	52	57	47	43	37	32	42
Seaside	28	46	44	48	56	55	63	70	57	48	41	35	50
Small town	19	30	41	42	42	41	49	57	50	40	31	29	39

* Sample size too small to undertake an analysis

- No returns received

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

	2013 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	40	54	56	60	66	68	72	74	69	62	59	50	61
North Wales	39	53	56	63	70	70	75	80	72	59	57	44	63
Mid Wales	33	43	48	51	63	60	68	66	60	55	43	36	52
South East Wales	47	64	62	62	67	72	73	71	70	72	72	63	66
South West Wales	29	39	42	48	57	58	66	69	64	48	42	42	50
1-3 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
4-10 rooms	36	40	42	39	62	64	70	71	57	47	44	44	52
11-25 rooms	32	43	47	50	59	56	61	68	60	50	50	40	52
26-50 rooms	40	56	54	59	64	65	72	71	69	61	58	43	59
51-100 rooms	41	58	57	67	71	72	78	77	71	73	61	49	65
Over 100 rooms	48	64	68	70	73	80	80	78	79	72	74	67	71
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	25	38	46	48	59	56	60	60	59	32	48	*	49
£40-£49.99	29	43	55	63	71	64	72	72	67	54	51	38	57
£50-£59.99	40	51	48	59	66	64	68	67	63	60	54	36	56
£60 & over	43	58	58	61	67	71	74	76	72	66	63	56	64
Not graded	45	57	57	56	65	66	72	72	66	59	63	61	62
1 star	-	-	-	-	-	-	-	-	-	-	-	-	-
2 stars	50	58	58	58	74	78	80	72	68	63	62	*	65
3 stars	35	48	52	61	66	67	73	75	70	59	54	41	59
4 stars	41	54	54	56	61	63	67	67	63	64	57	47	58
5 stars	54	70	70	64	73	81	79	83	80	77	77	71	74
City/large town	49	67	64	64	69	77	78	75	76	73	75	67	69
Countryside/village	36	46	45	50	60	58	63	66	58	54	49	40	52
Seaside	35	50	54	58	67	67	74	78	70	58	51	43	60
Small town	35	45	54	70	69	68	71	73	71	58	52	42	60

* Sample size too small to undertake an analysis

- No returns received

Appendix 2 – Guest Houses/ B&Bs

Appendix 2a – Guest Houses/B&Bs: Trends in Bed Occupancy Rates – Monthly Averages (%)

	Bed occupancy										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
January	13	14	17	12	12	11	13	10	10	10	8
February	20	21	21	20	20	18	18	17	16	14	17
March	23	21	27	20	21	24	20	20	19	21	21
April	37	36	30	35	33	25	31	31	33	29	23
May	43	41	39	41	40	38	37	34	33	33	36
June	41	47	47	46	43	36	39	40	39	40	37
July	50	54	53	56	47	45	46	42	43	40	48
August	63	64	64	62	57	52	51	47	53	46	49
September	42	46	48	45	43	38	41	39	38	38	36
October	30	34	33	32	31	30	30	31	25	25	24
November	21	20	17	19	20	17	18	18	16	15	17
December	17	18	14	19	15	15	15	13	10	10	15
Annual Average	34	35	35	34	33	29	30	29	28	27	28

Appendix 2b – Guest House/ B&Bs: Bed Occupancy 2013 (%)

	2013 Monthly bed occupancy												Avg
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
All Wales	8	17	21	23	36	37	48	49	36	24	17	15	28
North Wales	6	16	19	24	39	38	49	55	39	27	18	19	29
Mid Wales	6	13	15	22	34	32	44	47	32	22	13	9	25
South East Wales	12	23	18	20	26	26	34	26	29	16	14	14	22
South West Wales	7	18	29	25	44	48	61	66	45	29	23	17	36
1-3 rooms	8	12	17	21	38	36	43	48	33	22	16	14	26
4-10 rooms	7	17	21	24	37	38	52	53	38	26	18	14	30
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	-	*
26-50 rooms	*	*	*	*	*	*	-	-	*	-	-	*	*
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	6	14	11	29	31	21	28	22	15	12	13	*	17
£30-£39.99	8	17	22	22	35	36	49	49	36	24	16	15	28
£40-£49.99	5	8	18	18	36	36	40	41	36	24	21	14	27
£50-£59.99	9	28	19	30	41	45	59	60	40	26	20	7	32
£60 & over	*	*	*	33	46	52	63	78	*	*	*	*	*
Not graded	*	*	8	15	27	21	37	39	33	20	*	*	21
1 star	*	*	*	*	*	*	*	*	-	-	*	*	*
2 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
3 stars	7	18	18	21	27	27	36	36	27	17	19	6	23
4 stars	7	14	23	22	42	44	54	54	39	28	22	19	31
5 stars	9	18	21	30	44	49	58	70	44	25	12	18	33
City/large town	*	*	*	*	*	*	*	*	*	*	*	*	*
Countryside/village	6	16	19	19	34	35	45	46	35	24	18	15	27
Seaside	8	14	21	26	43	46	60	63	35	17	7	6	34
Small town	9	15	21	26	41	41	48	50	43	33	21	13	30

* Sample size too small to undertake an analysis

- No returns received

Appendix 2c – Guest House/ B&Bs: Room Occupancy 2013 (%)

	2013 Monthly room occupancy												Avg
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
All Wales	12	21	26	30	44	44	55	57	45	30	22	19	35
North Wales	9	23	24	28	44	45	56	63	47	34	23	24	35
Mid Wales	12	18	21	30	42	43	54	57	40	29	18	12	32
South East Wales	17	21	24	29	32	34	40	31	38	21	18	18	28
South West Wales	9	23	34	33	55	55	67	73	55	36	26	21	43
1-3 rooms	11	18	24	26	44	45	51	57	40	28	20	18	33
4-10 rooms	10	21	26	32	45	44	57	60	48	32	22	18	36
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	-	*
26-50 rooms	*	*	*	*	*	*	-	-	*	-	-	*	*
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	10	17	17	44	37	27	33	24	21	13	19	*	22
£30-£39.99	12	21	28	29	43	43	55	57	45	30	20	19	34
£40-£49.99	7	12	22	22	43	47	50	52	44	34	27	22	34
£50-£59.99	14	42	29	39	51	57	71	72	52	33	25	9	40
£60 & over	*	*	*	39	51	54	70	81	*	*	*	*	*
Not graded	*	*	11	17	32	25	40	44	43	26	*	*	26
1 star	*	*	*	*	*	*	*	*	-	-	*	*	*
2 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
3 stars	11	26	25	33	37	39	47	45	36	25	27	9	31
4 stars	11	19	28	27	48	51	61	64	49	35	26	25	37
5 stars	12	21	23	34	48	51	62	74	47	27	13	20	36
City/large town	*	*	*	*	*	*	*	*	*	*	*	*	*
Countryside/village	9	20	23	24	41	41	51	54	44	30	22	20	32
Seaside	11	17	26	31	47	55	70	73	45	21	9	7	40
Small town	14	22	36	42	56	58	62	61	60	45	27	17	41

* 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	28	36	20	26
February	32	29	35	36
March	33	26	35	43
April	52	23	51	52
May	76	10	50	38
June	62	10	55	50
July	88	7	66	30
August	*	*	72	27
September	70	18	66	49
October	43	21	50	58
November	24	39	31	30
December	21	13	33	27
<i>May-Oct Average</i>	<i>63</i>	<i>11</i>	<i>58</i>	<i>42</i>
<i>Jan-Dec Average</i>	<i>38</i>	<i>19</i>	<i>47</i>	<i>39</i>

Continued overleaf...

	£500 - £799.99		£800 +	
	Unit Occ (%)	Sample	Unit Occ (%)	Sample
January	*	*	*	*
February	*	*	26	5
March	42	20	16	7
April	25	11	39	7
May	60	38	39	11
June	66	21	28	8
July	67	47	52	22
August	87	37	82	26
September	70	28	32	5
October	62	17	43	7
November	26	10	19	6
December	37	26	29	12
<i>May-Oct Average</i>	<i>69</i>	<i>31</i>	<i>54</i>	<i>13</i>
<i>Jan-Dec Average</i>	<i>58</i>	<i>22</i>	<i>43</i>	<i>10</i>