

Wales Accommodation Occupancy Survey, 2014

Annual Report

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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.

Change in Occupancy Reporting

From January 2014 a change has been made to hotel occupancy data. Syndicated data for c.100 larger hotels with 100+ rooms provided by STR Global is now included in the overall Wales hotel occupancy calculation. The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs overseas, business travellers vs. non business travellers). Data is included for the whole of 2014 but not for any years prior to this. Including this data makes the survey much more robust but may have some impact on trends before 2014.

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 2014 Wales Accommodation Occupancy Survey. Where available and appropriate, comparative figures from previous years are presented throughout the report.

Hotels

- The average bed and room occupancy rates for 2014 were 50% and 66% respectively. These rates represent a five percentage point increase on those recorded in 2013 and are also the highest annual average occupancy rates recorded for this sector during the last 11 years.
- In 2014, both the average annual bed occupancy and the average annual room occupancy rates showed a five percentage point rise when compared with 2013.

- Over the previous ten years (2004 – 2013), the annual average bed occupancy rate showed the greatest consistency with rates in the range 42% - 45%, while the average annual room occupancy rate ranged from 57% - 61%.
- The 2014 annual average room occupancy rate increased in North, South East and South West Wales when compared with both 2013 (by between 3 and 14 percentage points) and 2004 (by between 6 and 9 percentage points). In Mid Wales, the 2014 annual average room occupancy rate of 52% was the same as that of both 2013 and 2004.
- The South East region again recorded the highest annual average room occupancy rate of 71% - the highest average recorded during the period under review (2004 – 2014).

Guesthouses/B&B's

- While the annual average bed occupancy rates for Guest Houses/ B&Bs across Wales have remained relatively constant at 27 or 28% over the last three years, the annual average room bed occupancy rate fell from 34 and 35% in 2012 and 2013 to 33% in 2014.
- The seasonality of the Guest House/B&B sector in Wales remains evident in 2014. The average bed occupancy rate began the year at 10% in January before rising to a peak of 50% in August and ending the year with a rate of 13% in December 2014. The average room occupancy rate also followed a similar pattern, rising from 14% in January to 57% in August and then falling back to 17% in December.
- The annual average room occupancy rates in South East Wales rose from 28% in 2013 to 32% in 2014 while in North Wales it remained constant at 35%. In Mid Wales and South West Wales the annual average room occupancy rate declined (from 32% to 27% and from 43% to 40% respectively).

All Service Accommodation

- The annual average bed occupancy rate for all serviced accommodation across Wales in 2014 was 45%, while the annual average room occupancy rate was 60%.

- The annual average room occupancy rate has also shown a great degree of consistency over recent years with a rate of 52% recorded each year between 2008 and 2012, increasing in 2013 to 54% and in 2014 to 60%.

Self-Catering Cottages & Apartments

- The annual average unit occupancy was 51% in 2014, one percentage point higher than in 2013. As with the serviced sectors, self-catering accommodation also continued to demonstrate seasonality in the average unit occupancy rates recorded for each month in 2014. A unit occupancy rate of 24% was recorded in January which rose to a peak of 87% in August before falling to 31% in November (and rising to 41% in December).
- The annual average unit occupancy rate for independently let properties across Wales was 46%, the same as in 2013. Agency let properties have had relatively stable annual average unit occupancy rates in recent years, with the annual average unit occupancy rate in the range 57%-58% from 2011 to 2013.

Caravan Holiday Homes

- The seasonal average for caravan holiday homes remained above 75% in the period 2009 – 2013. However the figure for 2014 shows a drop of 13 percentage points to 65% - the lowest of the years under review.
- With the exception of April, the 2014 occupancy rates showed decreases across all months when compared with previous years – the decreases ranging from 16 percentage points in March to 24 percentage points in both July and August.

Touring Caravan & Camping Parks

- The May to October seasonal average has shown some variation over the years influenced, in part by sample variations in the sample. The 2014 rate of 27% is one percentage point lower than the seasonal average recorded in 2013, five lower than that of 2012 (32%) and only just over half that of 2008.
- The 2014 seasonal average for coastal locations stayed at the same level when compared with that of 2013 while inland locations fell by nine percentage points.

Hostels & Bunkhouses

- The annual average bed occupancy for Hostels and Bunkhouses was 46% in 2014, up by four percentage points on the average in 2013 (42%).
- In 2014 only three months (February, March and June) showed a decrease in average bed occupancy when compared with 2013 – although the decrease in March can probably be attributed to the fact that Easter was at the end of March in 2013 rather than in April (reflected also in the fact that April saw an 11 percentage point rise in occupancy in 2014). Occupancy in August 2014 rose to 73% - the highest recorded in the period under review.

2 Introduction

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Change in Occupancy Reporting

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This report covers the 2014 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 Hotels

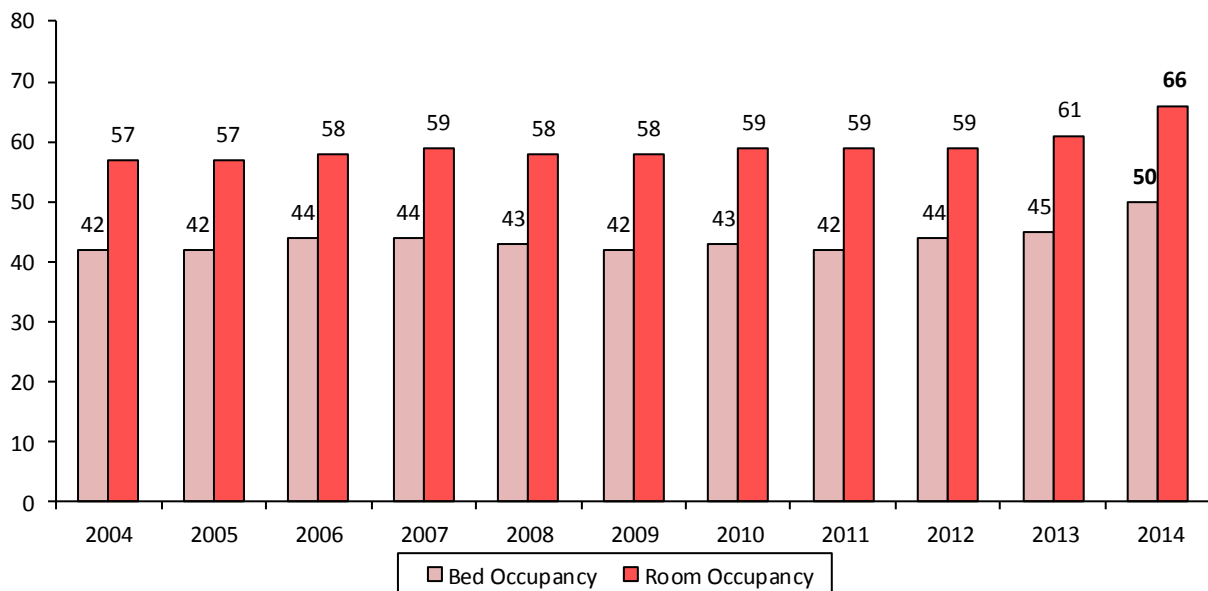
3 Hotels

This section of the report presents the 2014 occupancy data for hotels. Please note that the hotel data for 2014 includes data from STR Global for larger hotels with 100+ rooms.

3.1 Annual Average Bed & Room Occupancy

The average bed and room occupancy rates for 2014 were 50% and 66% respectively. These rates represent a five percentage point increase on those recorded in 2013 and are also the highest annual average occupancy rates recorded for this sector during the last 11 years.

Figure 3.1 - Hotels - Trends in Occupancy Rates - Annual Averages (%)



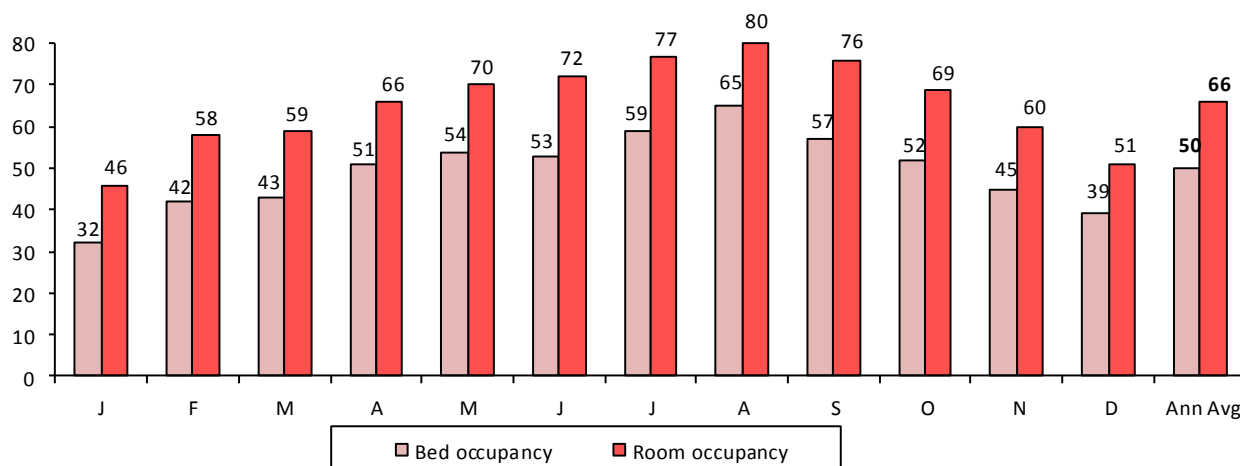
In 2014, both the average annual bed occupancy and the average annual room occupancy rates showed a five percentage point rise when compared with 2013. This is in contrast to the position over the previous nine years when the rates showed only a one or two percentage point change year on year.

Over the previous ten years (2004 – 2013), the annual average bed occupancy rate showed the greatest consistency with rates in the range 42% - 45%, while the average annual room occupancy rate ranged from 57% - 61%. The 2014 rates continued the upward trend increasing by 8 percentage points (bed occupancy) and 9 (room occupancy) when compared with 2004.

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 2014 are presented in Figure 3.2 below.

Figure 3.2 - Hotels - Monthly Bed & Room Occupancy 2014 (%)



The seasonality of occupancy rates for hotels in Wales continued to be evident in 2014. The average bed occupancy rate rose from 32% in January to a peak of 65% in August before falling to 39% in December. The average room occupancy rate also followed a similar pattern starting the year at 46% before rising to 80% in August and ending the year at 51% in December.

Table 3.1 - Hotels - Trends in Room Occupancy Rates - Monthly Averages (%)

	Room Occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
January	35	40	38	40	39	40	39	40	40	40	46
February	49	48	50	50	50	48	50	53	49	54	58
March	52	52	51	53	54	51	53	56	59	56	59
April	54	57	58	58	56	58	60	61	57	60	66
May	63	63	65	65	66	62	64	64	63	66	70
June	65	65	66	67	66	68	69	68	66	68	72
July	67	67	70	67	67	70	70	69	67	72	77
August	68	69	73	73	71	70	69	67	72	74	80
September	69	69	71	71	69	69	70	68	71	69	76
October	58	58	61	62	61	63	63	61	60	62	69
November	52	50	53	55	54	54	54	56	52	59	60
December	45	43	44	47	45	47	42	44	49	50	51
Annual Average	57	57	58	59	58	58	59	59	59	61	66

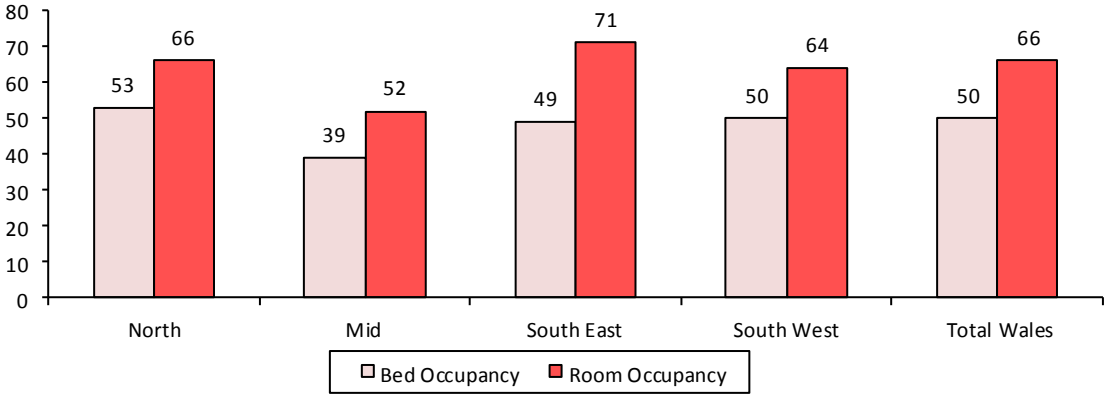
When compared with 2013, the average room occupancy rate increased every month in 2014, with the increases varying from 1 percentage point (November and December) to 7 percentage points (September and October).

The 2014 average monthly room occupancy rates were the highest recorded in the period 2004 – 2014. The greatest increases (of 12 percentage points) occurred in April and August, with December registering the smallest increase (of 6 percentage points).

Trends in monthly bed occupancy rates since 2004 may be found in Appendix 1a.

3.2 Regional Occupancy Rates

Figure 3.3 - Hotels – Annual Average Bed & Room Occupancy by Region 2014 (%)



The annual average bed occupancy rate was highest in North Wales (53%), with the South East and South West recording similar levels (49 and 50% respectively).

The annual average room occupancy rates were more variable with the highest rate being found in South East Wales (71%) followed by a rate of 66% for North Wales and 64% for South West Wales. Lower annual average occupancy rates were recorded in 2014 for Mid Wales (39% for bed occupancy and 52% for room occupancy).

Average bed and room occupancy levels for each region on a monthly basis for 2014 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.

3.2.1 Trends in Regional Occupancy Rates

Table 3.2 – Hotels - Trends in Room Occupancy Rates by Regions of Wales (%)

	Annual Average Room Occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Wales	54	54	57	59	57	62	61	61	62	63	66
Mid Wales	52	52	53	53	50	49	49	54	54	52	52
South East Wales	63	60	63	63	66	62	62	61	61	66	71
South West Wales	55	59	58	58	56	53	54	51	50	50	64
TOTAL WALES	57	57	58	59	58	58	59	59	59	61	66

The 2014 annual average room occupancy rate increased in North, South East and South West Wales when compared with both 2013 (by between 3 and 14 percentage points) and 2004 (by between 6 and 9 percentage points). In Mid Wales, the 2014 annual average room occupancy rate of 52% was the same as that of both 2013 and 2004.

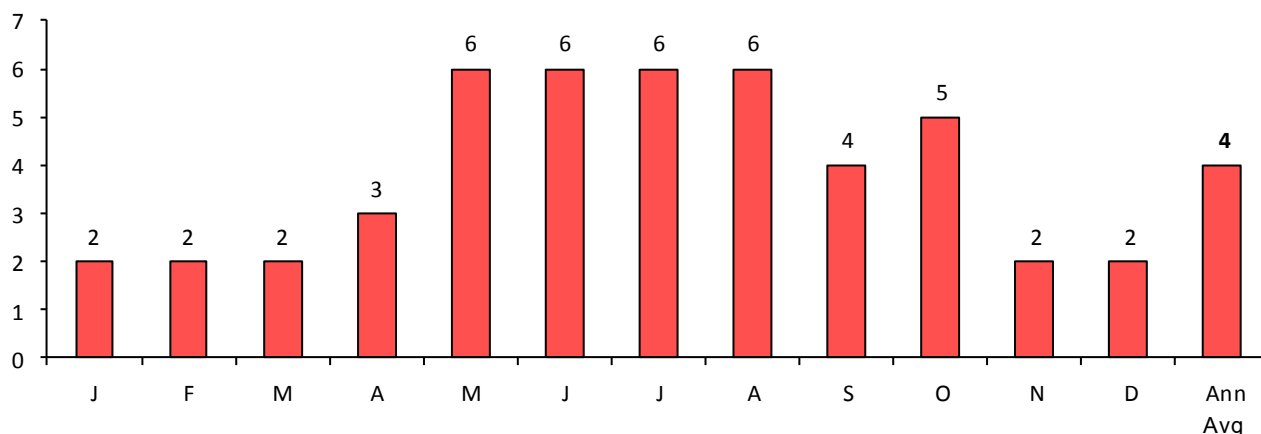
The South East region again recorded the highest annual average room occupancy rate of 71% - the highest average recorded during the period under review (2004 – 2014).

3.3 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 was based on the total number of arrivals. This information on arrivals has not been collected from 2008 onwards, so consequently the proportion of overseas stays is presented 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 is on the latest 2008 to 2014 results.

Figure 3.4 – Hotels - Percentage of Overseas Bednights 2014 (%)



For the first three months of 2014, the percentage of overseas bednights remained at 2%. As in previous years, the overseas bednight occupancy rate continued to be highest during the summer months, with a figure of 6% being recorded in each month from May to August. The annual average was 4%.

3.3.1 Trends in Percentage of Overseas Guests

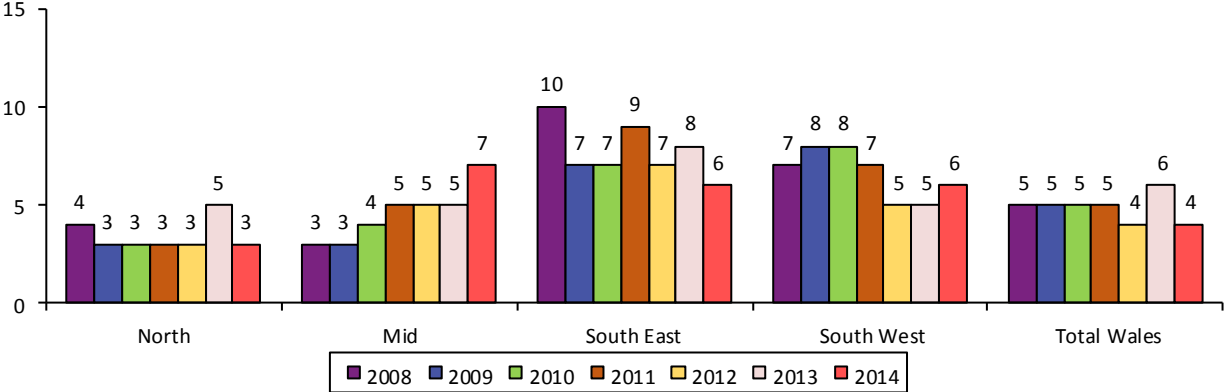
The annual average overseas bednights rate for 2014 was 4%, two percentage points lower than in 2013.

Table 3.3 – Hotels – Trends in Percentage of Overseas Guests

	% of Overseas Bednights						
	2008	2009	2010	2011	2012	2013	2014
January	3	5	4	6	5	3	2
February	2	4	4	4	2	3	2
March	3	4	5	5	4	3	2
April	4	4	4	4	4	5	3
May	6	5	5	6	5	6	6
June	6	5	6	6	3	7	6
July	7	6	6	7	6	9	6
August	4	5	4	5	7	7	6
September	8	5	6	5	5	7	4
October	5	4	6	4	4	5	5
November	7	4	5	4	2	2	2
December	3	2	3	3	3	6	2
Annual Average	5	5	5	5	4	6	4

Overseas bednight occupancy rates have continued to be 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. Figures for 2014 were lower than in 2013 in every month except May, October and November, where they remained at their 2013 level.

Figure 3.5 – Hotels – Percentage of Overseas Guests by Region 2008 – 2014 (%)

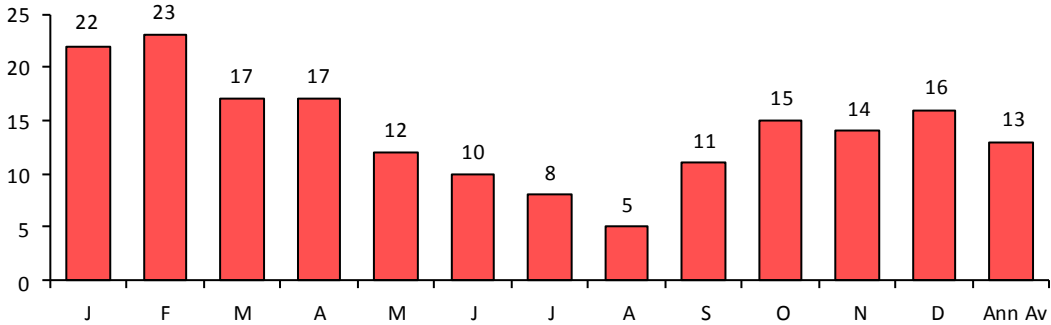


Unlike previous years the highest annual overseas guest occupancy in 2014 was found in Mid Wales (7% - an increase of 2 percentage points when compared with 2013). The lowest 2014 figure (3%) was recorded in North Wales. Mid Wales was the only region where the 2014 figure for overseas guests was higher than that of 2008

3.4 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 2014 is shown in Figure 3.6 below.

Figure 3.6 – Hotels – Percentage of Business Guests 2014 (%)



In 2014 business occupancy continued to demonstrate a converse pattern to that recorded for overall occupancy rates, with the highest business rates being recorded outside the main summer season. The highest 2014 average business occupancy rates were recorded at the beginning of the year, with rates of 22% and 23% respectively for January and February. These high rates contrast with lower summer rates of 8% and 5% (July and August) resulting in an annual average of 13% for 2014.

Table 3.4 – Hotels - Trends in Percentage of Business Guests

	% of Business Guests										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
January	41	45	41	33	38	31	22	29	27	17	22
February	38	37	30	25	26	26	19	21	17	16	23
March	39	30	28	21	19	24	20	19	11	11	17
April	25	26	15	15	24	17	13	9	7	7	17
May	24	19	17	18	16	16	15	15	9	7	12
June	20	21	17	16	19	20	14	12	7	7	10
July	22	19	17	14	18	17	13	11	7	7	8
August	15	14	14	10	11	11	9	9	6	6	5
September	21	22	15	12	18	14	12	10	6	11	11
October	25	25	21	15	21	18	15	13	8	9	15
November	38	34	24	23	28	19	24	21	11	20	14
December	24	28	18	24	21	17	20	14	12	22	16
Annual Average	27	25	20	18	20	18	15	14	9	10	13

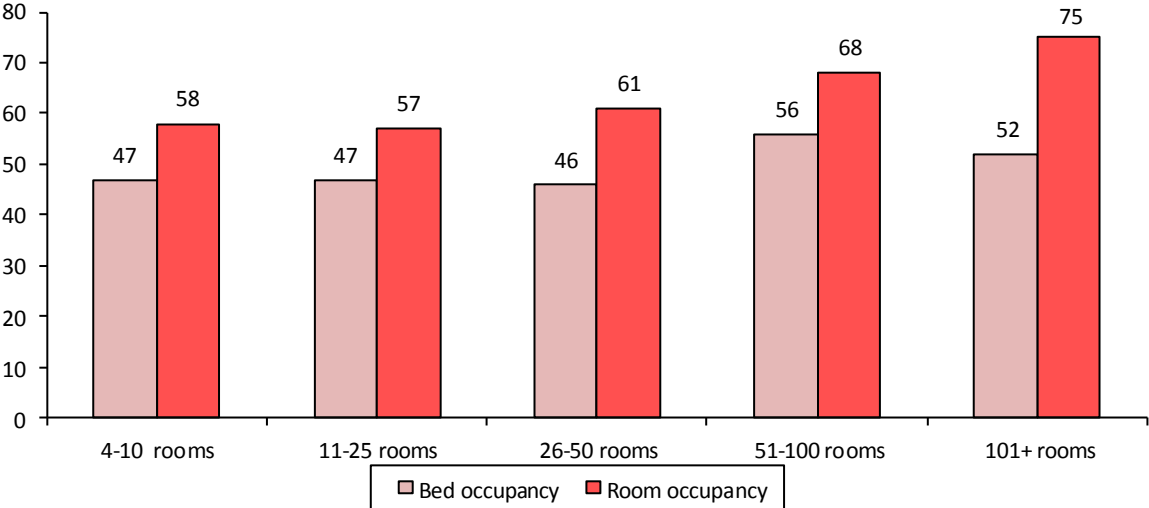
The 2014 annual average business occupancy rate of 13% showed an increase of 3 percentage points when compared with the 2013 figure. Unlike 2013, the highest figures for business occupancy were to be found in January and February, reverting to the pattern of years prior to 2013. Overall the figures for business use in hotels have declined in the years since 2004.

Please note that while the sample sizes for those providing business data have been fairly consistent over the period 2012 - 2014, not all establishments provide business occupancy data.

3.5 Occupancy by Size of Hotel

The annual average bed and room occupancy figures by size of hotel for 2014 are presented in Figure 3.7 below. Due to the small sample size in this category 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 - 2014 (%)



Variations by hotel size were more evident for annual average room occupancy than for bed occupancy in 2014, with the rates for the two smallest size bands being 58 and 57% while the three largest size bands had rates of 61, 68 and 75% - 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. The annual average bed occupancy rates for the smallest hotels (4-10 and 11-25 rooms) were around 10 percentage points different than the average annual room occupancy rates, those for the larger hotels were considerably lower than the room occupancy rates – by up to 23 percentage points.

Table 3.5 – Hotels – Trends in Annual Room Occupancy Rates by Size of Hotel

No. of rooms	Annual Average Room Occupancy (%)										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
4-10	48	47	47	46	40	40	45	52	49	52	58
11-25	50	52	53	54	53	55	53	54	51	52	57
26-50	56	56	58	61	62	58	57	56	62	59	61
51-100	66	60	62	64	66	63	66	65	65	65	68
101+	68	69	71	68	67	69	68	63	64	71	75

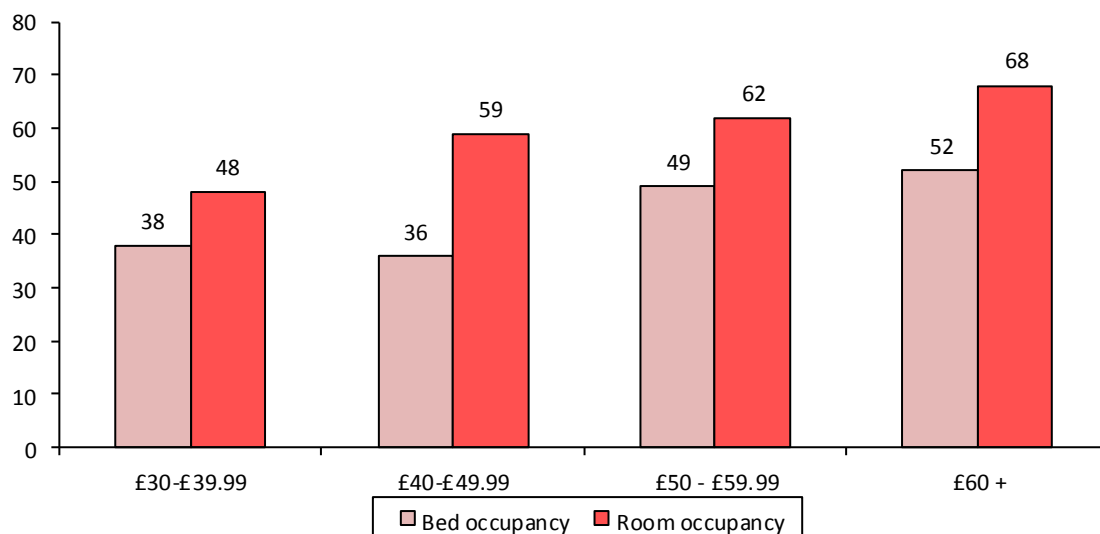
Compared with 2013, the largest increases in the annual average room occupancy rate in 2014 were recorded for hotels with 4-10 and 11-25 rooms with increases of 6 and 5 percentage points respectively. With the exception of the 26-50 size band, all size categories have seen a rise in annual average room occupancy in the last three years with the greatest increase (of 11 percentage points) occurring in the largest hotels.

3.5 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 2014. There are no figures for hotels with a tariff of less than £20 as there were no establishments in this tariff band in the sample in 2014.

Figure 3.8 – Hotels – Annual Occupancy by Tariff of Hotel – 2014 (%)



In 2014, 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. As in 2013, the highest annual average bed and room occupancy rates were recorded for hotels charging £60 or more (52% and 68% respectively). However, the lowest annual average bed occupancy rate was recorded by those charging £40-£49.99 (36%) rather than establishments in the lowest tariff band (although establishments charging £30-£39.99 did record the lowest annual average room occupancy rate of 48%).

Table 3.6 - Hotels – Trends in Annual Room Occupancy Rates by Tariff of Hotel (%)

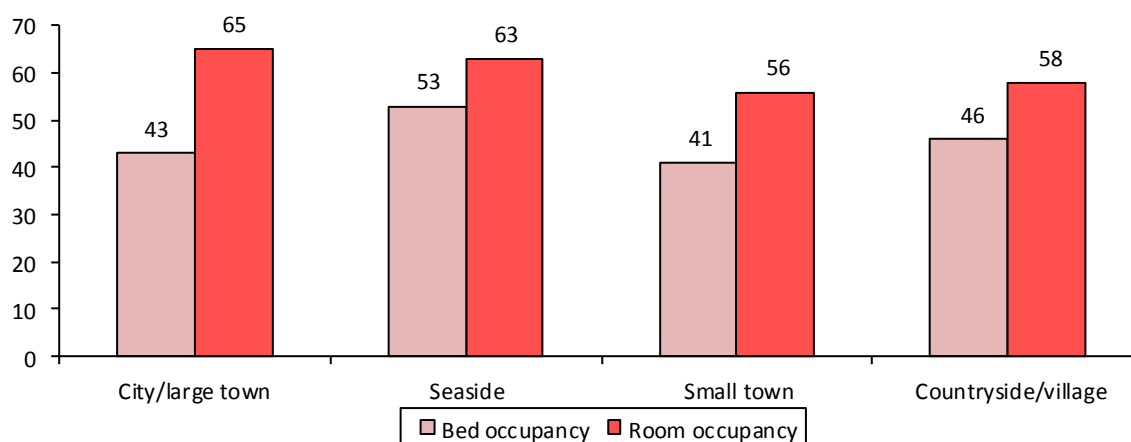
Annual Average Room Occupancy											
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
£30-£39.99	49	50	47	48	45	43	45	46	49	49	48
£40-£49.99	53	57	44	53	51	51	55	59	58	57	59
£50-£59.99	58	57	62	62	59	54	59	60	57	56	62
£60+	60	60	61	63	64	63	61	60	61	64	68

The annual average room occupancy rate for those in the lowest tariff band has remained relatively consistent over the period under review. However, the remaining three bands all recorded a rise during this period.

3.6 Occupancy by Location

Occupancy rates were analysed according to the location of the hotel - in a city/large town, in 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 - 2014 (%)



Establishments in seaside areas recorded the highest annual average bed occupancy rate (53%), with the lowest rate being found in hotels in small towns (41%), consistent with previous years. City/large town hotels recorded a rate of 43% with that for country/ village hotels being 46%.

As in previous years, it was establishments in cities/ large towns that recorded the highest annual average room occupancy rate (65%) which compares with 63% in seaside locations, 58% in country/village locations and 56% 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 leading to a greater difference between room and bed occupancy rates.

Table 3.7 – Hotels - Trends in Annual Room Occupancy Rates by Location of Hotel (%)

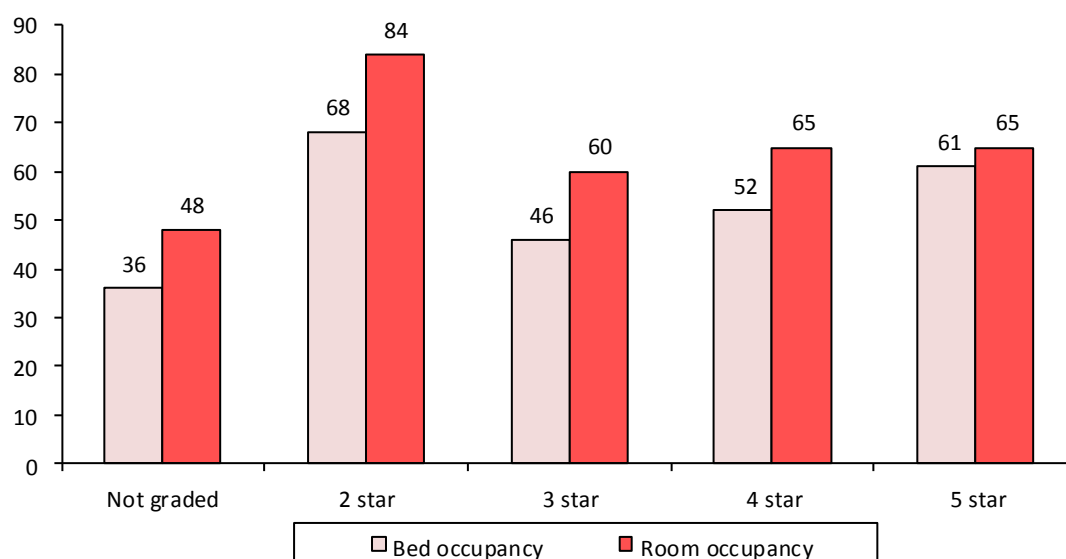
	Annual Room Occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
City/large town	69	67	71	71	71	69	66	62	64	69	65
Small town	54	56	57	57	53	55	61	59	61	60	56
Seaside	56	56	57	62	60	58	59	60	59	60	63
Countryside/ village	53	53	53	52	53	52	53	55	53	52	58

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 recovered over to 69% in 2013 but fell back to 65% in 2014 (4 percentage points lower than in 2004). Small towns saw a rise to 60% in 2013 with a subsequent fall to 56% in 2014, while hotels in seaside and country/village locations seen their occupancy rates rise fairly consistently over the period.

3.7 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 2014.

Figure 3.10 – Hotels – Annual Occupancy by Grading of Hotel – 2014 (%)



Hotels not graded within the Visit Wales grading scheme recorded lower annual average figures for both bed and room occupancy rates in 2014 than graded establishments. The highest annual average bed and room occupancy rates were recorded by establishments with a 2 star grading (68 and 84%). 3, 4 and 5 star hotels achieved similar room occupancy rates (60, 65 and 65%) but their bed occupancy rates varied from 46 to 61%

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	2014
Not graded	52	39	36	42	51	46	53	54	53	62	48
2 stars	59	56	58	56	61	59	59	64	64	65	84
3 stars	56	57	59	60	61	58	58	57	59	59	60
4 stars	60	59	61	61	57	64	64	60	60	58	65
5 stars	49	53	57	65	62	68	67	73	77	74	65

Over the period 2004 - 2014, the annual average room occupancy rate showed the greatest consistency for establishments with a 3 star grading with this grade being in the range 56-61% over this period of time. Rates for hotels with 5 stars reached a peak of 77% in 2012 but have declined to 65% in 2014. 2 and 4 star hotels have experienced a considerable degree of fluctuation in their annual room occupancy rates with both recording an increase (of 25 and 5 percentage points) on their 2004 rates – resulting in the 2 star category having a rate of 84% in 2014.

Rates for ungraded establishments fluctuated over the years reaching a peak of 62% in 2013, but falling back to 48% in 2014.

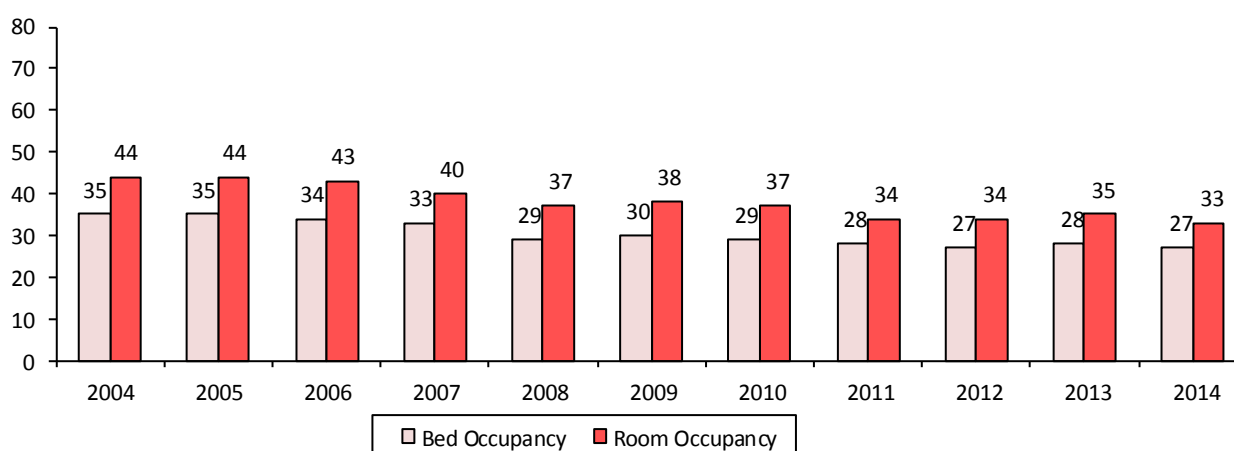
4 Guest Houses/ B&Bs

This section presents the monthly and annual average bed and room occupancy levels for Guest Houses/ B&Bs.

4.1 Annual Average Bed and Room Occupancy

While the annual average bed occupancy rates for Guest Houses/ B&Bs across Wales have remained relatively constant at 27 or 28% over the last three years, the annual average room bed occupancy rate fell from 34 and 35% in 2012 and 2013 to 33% in 2014.

Figure 4.1 Guest Houses/B&Bs – Trends in Occupancy Rates – Annual Averages (%)

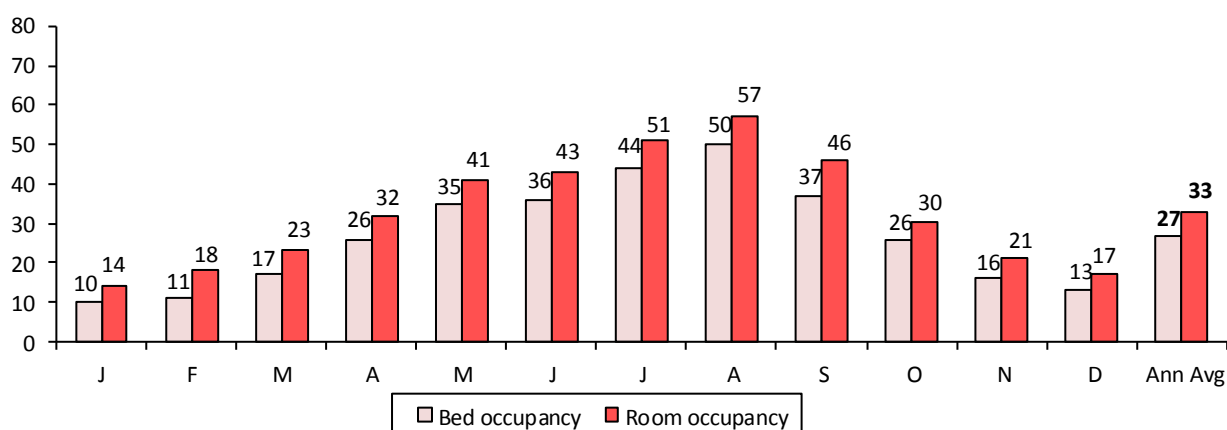


The 2014 annual averages show a small decrease compared with the 2013 figures and are considerably below the peak values of 2004 when the annual average room occupancy was 44% and the annual average bed occupancy was 35%.

4.2 Monthly Bed and Room Occupancy

The 2014 monthly bed and room occupancy rates together with the annual averages for the guest house and bed and breakfast sector in 2014 are presented in Figure 4.2 below.

Figure 4.2 - Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2014 (%)



The seasonality of the Guest House/B&B sector in Wales remains evident in 2014. The average bed occupancy rate began the year at 10% in January before rising to a peak of 50% in August and ending the year with a rate of 13% in December 2014. The average room occupancy rate also followed a similar pattern, rising from 14% in January to 57% in August and then falling back to 17% in December.

Table 4.1 - Guest Houses/B&Bs - Trends in Room Occupancy Rates - Monthly Averages (%)

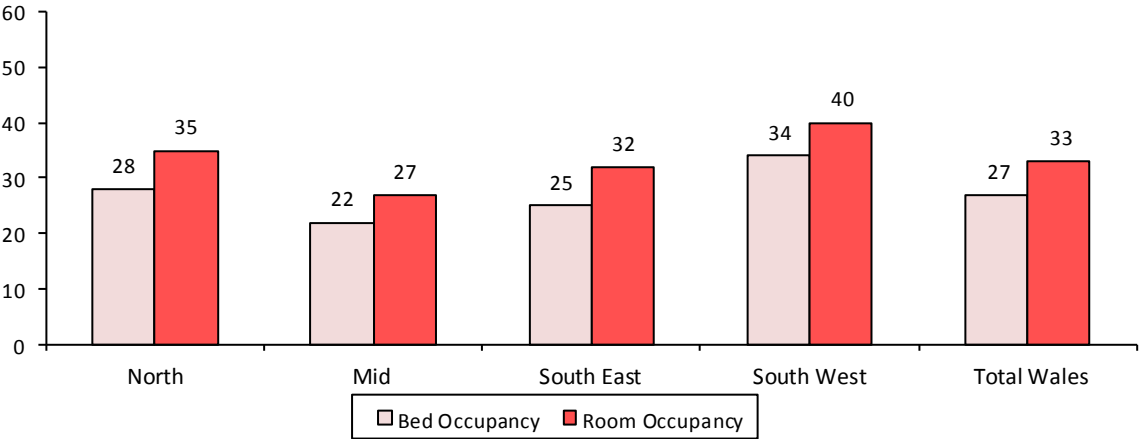
	Room occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
January	22	26	17	19	18	17	15	13	14	12	14
February	27	29	27	27	26	25	24	19	19	21	18
March	29	36	28	29	30	27	27	24	28	26	23
April	44	40	42	40	34	38	38	39	36	30	32
May	49	49	52	49	46	45	42	41	42	44	41
June	57	56	57	50	45	48	50	49	48	44	43
July	64	63	65	54	54	54	53	50	49	55	51
August	73	72	71	66	59	59	57	59	53	57	57
September	56	59	56	51	47	51	50	45	48	45	46
October	43	41	43	39	38	39	39	29	32	30	30
November	28	24	28	27	25	25	25	19	20	22	21
December	25	20	27	19	21	21	18	13	13	19	17
Annual Average	44	44	43	40	37	38	37	34	34	35	33

Decreases were recorded for all months of 2014 when compared with 2013 except for January, April and September which showed increases of 1 or 2 percentage points. When compared with 2004, all months showed decreases ranging from 6 percentage points (March, November and December) to 16 percentage points (August). 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 2014. 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 – 2014 (%)



As in previous years, the annual average bed and room occupancy rates were highest in South West Wales where averages of 34% and 40% respectively were recorded for establishments in this region. This contrasts with Mid Wales where the annual average bed occupancy rate was 22% and for room occupancy was 27%.

Table 4.2 - Guest Houses/B&Bs - Trends in Room Occupancy Rates by Regions of Wales (%)

	Room occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
North Wales	42	44	43	41	35	39	39	35	31	35	35
Mid Wales	33	34	33	33	29	33	32	34	32	32	27
South East Wales	52	51	49	46	43	40	38	25	31	28	32
South West Wales	48	47	48	43	43	39	39	37	40	43	40
All Wales	44	44	43	40	37	38	37	34	34	35	33

As shown in Table 4.2, the annual average room occupancy rates in South East Wales rose from 28% in 2013 to 32% in 2014 while in North Wales it remained constant at 35%. In Mid Wales and South

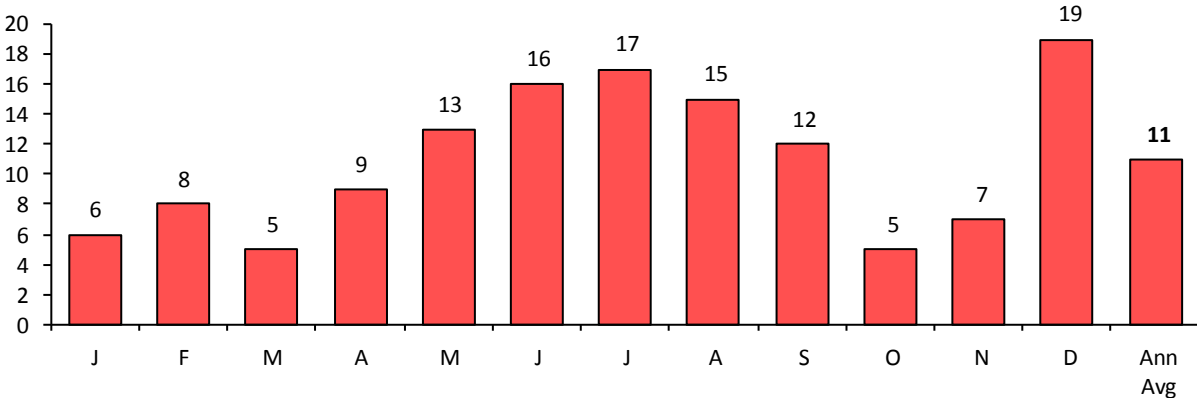
West Wales the annual average room occupancy rate declined (from 32% to 27% and from 43% to 40% respectively).

4.4 Percentage of Overseas Guests

As detailed in the previous section, in 2008 there was a change in the way that data for overseas guests was collected, with the forms updated to make them more focused and efficient. In previous years, establishments had been 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 2014 results.

Figure 4.4 - Guest Houses/B&Bs - Percentage of Overseas Bednights - 2014 (%)



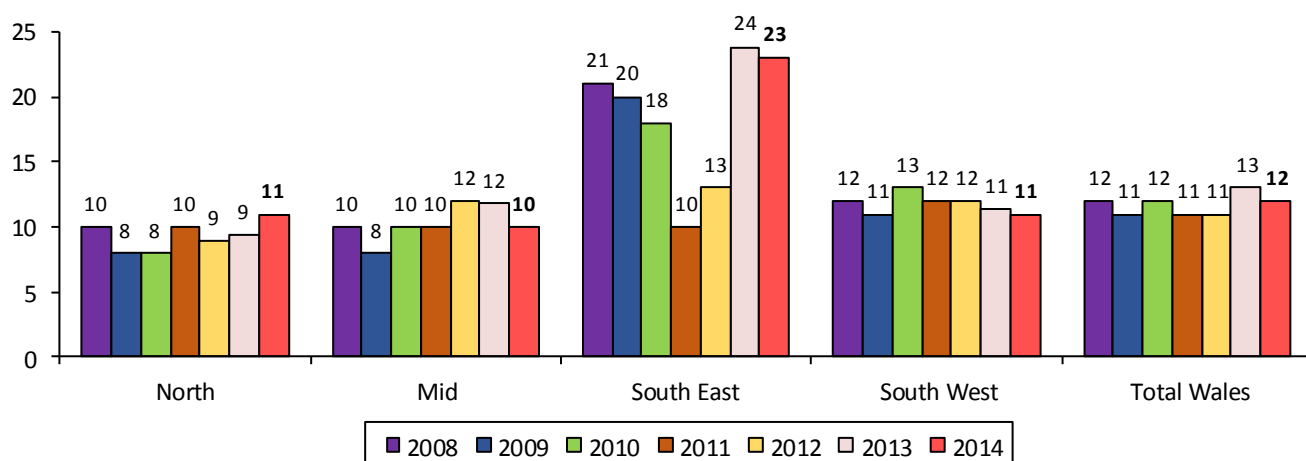
December was the peak month for overseas visitors with 19% of bednights attributable to overseas guests. The summer months (May to September) experienced rates between 13% and 15% while the lowest rate (5%) was seen in March and October.

Table 4.3 - Guest Houses/B&Bs - Trends in Percentage of Overseas Bednights

	Room occupancy						
	2008	2009	2010	2011	2012	2013	2014
January	10	13	10	5	11	5	6
February	5	9	7	7	12	9	8
March	9	6	7	5	9	10	5
April	11	8	10	10	10	13	9
May	12	9	12	11	12	12	13
June	12	14	11	12	13	14	16
July	21	17	15	16	17	17	17
August	15	14	12	12	13	14	15
September	13	9	12	10	11	13	12
October	7	10	10	9	6	10	5
November	5	7	11	7	6	9	7
December	8	9	16	3	6	10	19
Annual average	12	11	12	11	11	13	11

Over the past seven years, the percentage of overseas bednights has remained fairly consistent, particularly during May to September. The exceptions to this are January (where the percentage of overseas guests has fallen from 10 in 2008 to 6 in 2014) and December where the percentage has fluctuated, starting at 8% in 2008, rising to 16% and then falling to 3% in 2010 before rising to 19% in 2014.

Figure 4.5 - Guest Houses/B&Bs - Percentage of Overseas Guests by Region 2008 –2014 (%)



Except for South East Wales all regions have recorded comparatively little variation in the percentage of overseas guests. South East Wales recorded high values of up to 21% in the years 2008-2010 (double those experienced in North and Mid Wales and up to 9 percentage points higher than those of South West Wales). Levels in this region fell to 10% in 2011 (due to a decline in both response rates and occupancy levels reported), rose to 13% in 2012 and to 24 and 23% in 2013 and 2014.

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.

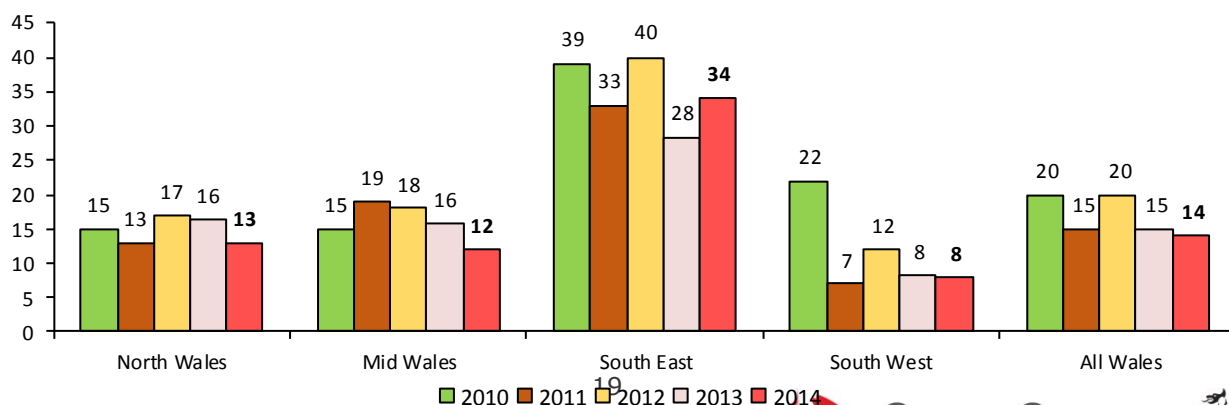
Table 4.4 - Guest Houses/B&Bs - Percentage of Business Guests – 2010 - 2014 (%)

Percentage of Business Guests					
	2010	2011	2012	2013	2014
January	61	43	50	58	47
February	63	33	42	30	40
March	36	21	23	24	18
April	21	7	16	20	10
May	11	15	15	10	6
June	14	11	14	12	7
July	15	7	10	7	12
August	10	8	12	6	8
September	15	11	16	12	12
October	17	19	29	21	16
November	36	42	37	38	20
December	40	36	30	28	37
Annual average	20	15	20	15	14

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% (2010 - 2013) and falling to 14% in 2014. As shown in Table 4.4 (above), this overall variation covers some even larger variations when analysed on a monthly basis.

The average business occupancy rate for 2014 was lower than that of 2013 in all but four months – February, July, August and December (+10, 5, 2 and 9 percentage points respectively). In the remaining months of 2014 the business rates recorded were among the lowest achieved since 2010. Figure 4.6 (overleaf) shows the percentage of business guests for the individual regions from 2010-2014. Again, please note that not all participants supplied this information, and, therefore, results are more variable than overall occupancy rates.

Figure 4.6 - Guest Houses/B&Bs - Annual Average Percentage of Business Guests by Region



2010– 2014 (%)

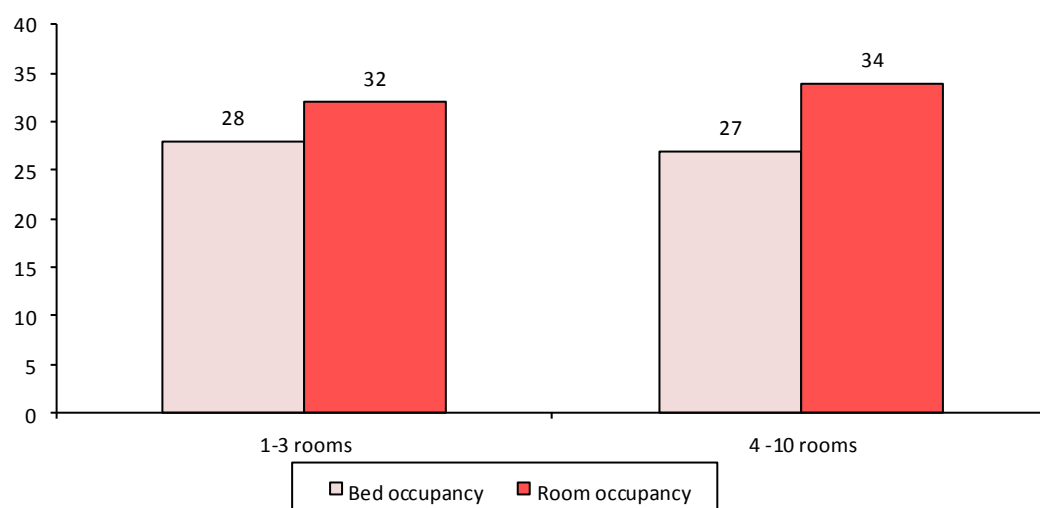
The annual average percentages of business guests have been relatively consistent over the past five years in North and Mid Wales. However, regions in the South of Wales have shown greater variation over this time period. In the South West, a decrease of fifteen percentage points was recorded in 2011, with subsequent years recording rates of 12% (2012) and 8% (2013 and 2014). In the South East, there was a decrease of twelve percentage points in 2013, with a recovery to 34% in 2014.

4.6 Occupancy by Size

As the sample size in the larger size categories was small, 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 4.7 - Guest Houses/B&Bs - Annual Occupancy by Size of Guest House/B&Bs - 2014 (%)



As shown in Figure 4.7 above, the annual average bed occupancy rate was slightly higher in those establishments with 1-3 rooms, while the room occupancy rate for this size category was slightly lower than for the larger establishments (4-10 rooms).

Table 4.5 - Guest Houses/B&Bs - Trends in Annual Room Occupancy Rates by Size of Guest House/Bed & Breakfast (%)

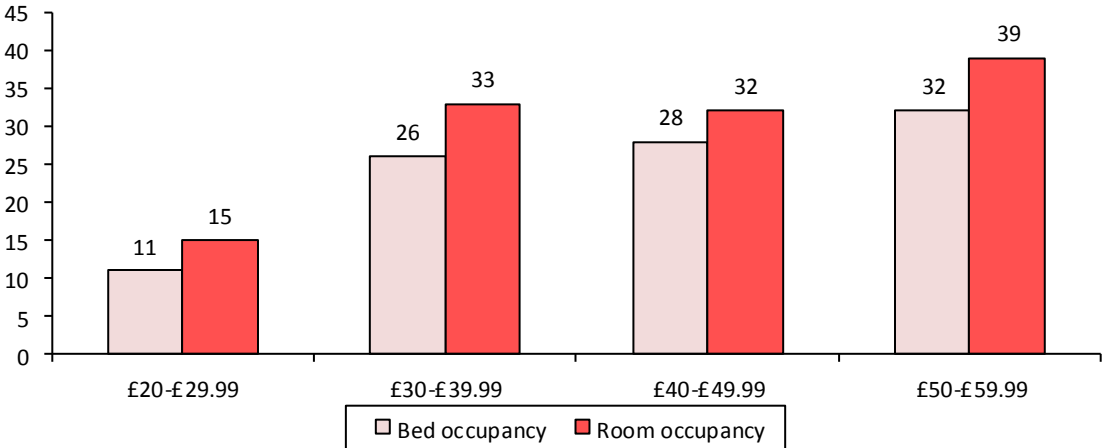
	Annual Average Room Occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
1-3 rooms	36	36	34	33	31	30	32	27	29	33	32
4-10 rooms	48	48	47	47	40	43	40	37	36	36	34

Both size categories recorded a decrease in annual average room occupancy when compared with 2013 (falling from 33% to 32% in the smaller establishments and from 36% to 34% in the larger establishments). In addition, both size categories have shown a fall when compared with the 2004 figures (of 4 percentage points for those with 1-3 rooms and of 14 percentage points for the larger size category).

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 4.8 - Guest Houses/B&Bs - Annual Occupancy by Tariff of Guest House/B&B – 2014 (%)



The annual average occupancy rates shown in Figure 4.8 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 only 11% and an annual average room occupancy rate of 15% in 2014, which compares to 32% and 39% respectively for those charging £50-£59.99. The rates for the middle two tariff bands in 2014 were again similar to each other and slightly lower than the rates for those charging £50-£59.99.

Figure 4.9 Guest Houses/B&Bs - Trends in Annual Room Occupancy Rates by Tariff of Guest Houses/B&Bs (%)

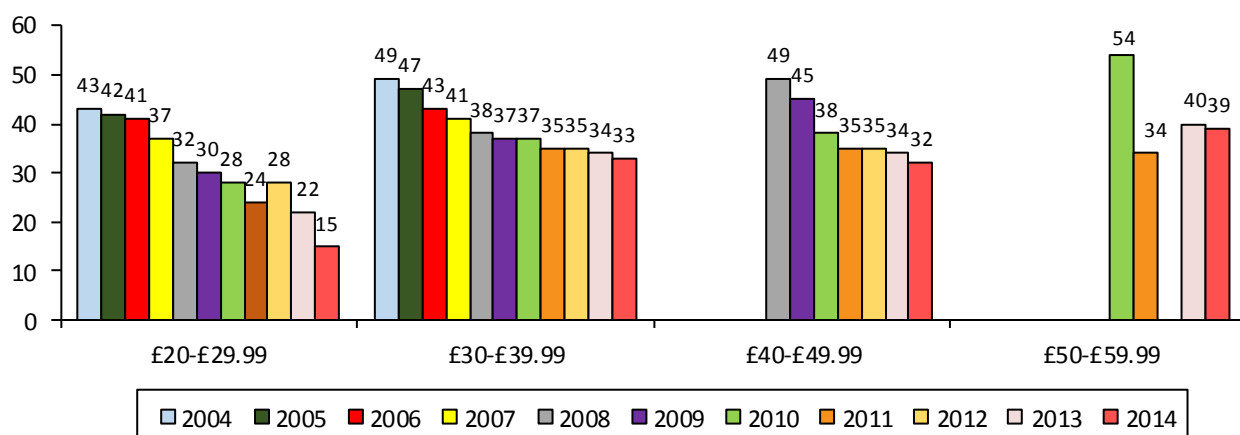


Table 4.6 Guest Houses/B&Bs - Trends in Annual Room Occupancy Rates by Tariff of Guest Houses/B&Bs (%)

Annual Average Room Occupancy by Tariff of Guesthouses/B&Bs											
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
£20-£29.99	43	42	41	37	32	30	28	24	28	22	15
£30-£39.99	49	47	43	41	38	37	37	35	35	34	33
£40-£49.99	*	*	*	*	49	45	38	35	35	34	32
£50-£59.99	*	*	*	*	*	*	54	34	*	40	39

* sample size too small to present data

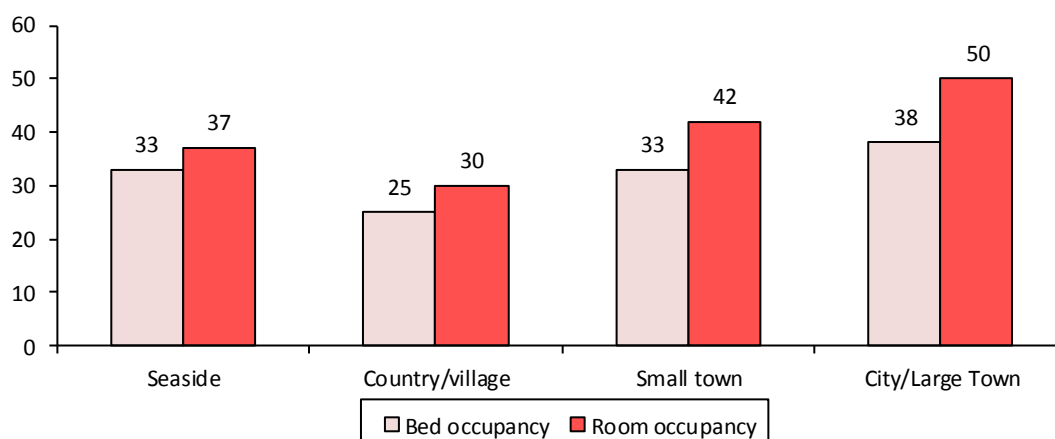
Annual average room occupancy rates have shown a general decline since 2004 for each of the tariff bands.

It should be noted that sample sizes for establishments charging £40-£49.99 and £50-£59.99 have not always been large enough to allow the analysis to be presented.

4.8 Occupancy by Location

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

Figure 4.10 - Guest Houses/B&Bs - Annual Occupancy by Location of Guest House/B&B – 2014 (%)



The highest annual average bed occupancy rate in 2014 was recorded for establishments in city/large town locations (38%) while those in country/village locations recorded an annual average of 25% and those in small towns and country/village locations a rate of 33%. City/large town locations also achieved the highest annual average room occupancy rate (50%) with that for other locations ranging from 42% (small towns) to 30% (country/village locations).

Table 4.7 - Guest Houses/B&Bs - Trends in Annual Room Occupancy Rates by Location of Guest House/B&B (%)

	Annual Average Room Occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
City/large town	63	64	67	64	57	54	42	*	45	*	50
Small town	38	42	41	40	38	40	37	44	43	41	42
Seaside	46	47	47	46	44	42	46	42	36	40	37
Countryside/village	41	41	40	36	33	33	34	30	31	32	30

* sample size too small to present data

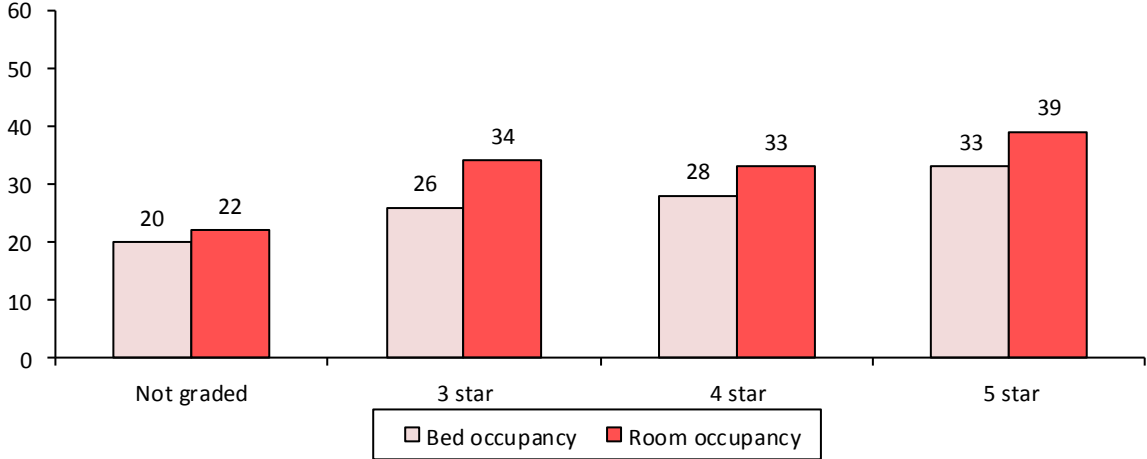
Since 2004, all locations except small towns have seen a fall of between 13 and 9 percentage points in the annual average room occupancy rate. Small towns have seen a rise of 4 percentage points in this period with a peak of 44% in 2011. Following decreases between 2010 and 2012 (from 46% to 36%), the annual average room occupancy rate for Guest Houses/B&Bs in seaside areas rose in 2013 to 40% but fell back to 37% in 2014. 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 4.11 presents annual bed and room occupancy figures by grading for 2014. As there was a very small sample size for establishments with 1 or 2 stars, there are no figures available for these grading categories. Please note also that not all establishments' supply grading information and that therefore the overall sample size is smaller than for other analysis categories.

Figure 4.11 - Guest Houses/B&Bs - Occupancy by Grading of Guest House/B&B - 2014 (%)



As in previous years, a correlation between grading and occupancy levels was recorded in 2014. Guest Houses/B&Bs that were not graded recorded an annual bed occupancy rate of 20% and an annual room occupancy rate of 22%, both of which are lower than those recorded for graded establishments.

Within the Visit Wales grading scheme, the annual average bed occupancy rates for 2014 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 26% compared to 33% for those with a 5 star grading.

Table 4.8 - Guest Houses/B&Bs - Trends in Annual Room Occupancy Rates by Grading (%)

	Annual Average Room Occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Not graded	33	35	36	36	34	22	26	24	19	26	22
3 Stars	44	43	43	38	35	38	36	31	32	31	34
4 Stars	48	44	45	43	40	38	39	36	37	37	33
5 Stars	-	-	-	-	41	48	43	35	32	36	39

3 and 4 star establishments have both seen a decline in annual average room occupancy rates since 2004 (their peak year with rates of 44 and 48% respectively) while non-graded establishments reached their peak (36%) in 2006 and 2007 but have declined since then. There are no figures for 5 star establishments prior to 2008, but this category too has seen a decline from their peak of 48% in 2009.

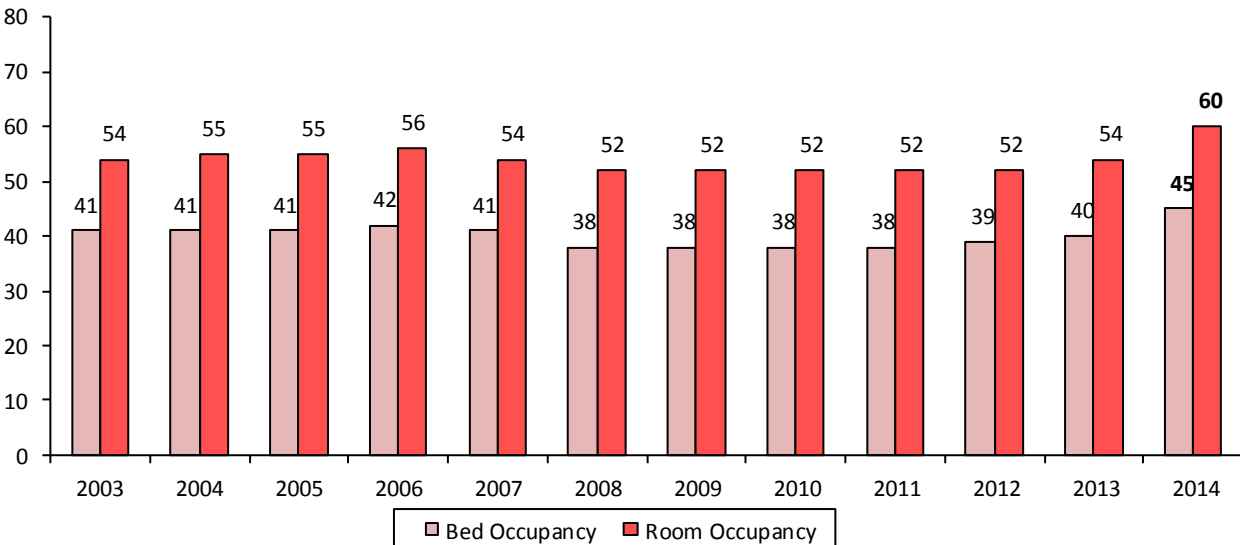
5 All Serviced Accommodation

This section of the report presents the monthly and annual average bed and room occupancy levels for all the various types of serviced accommodation i.e. Hotels, Guest Houses and B&Bs.

5.1 Average Bed and Room Occupancy

The annual average bed occupancy rate for all serviced accommodation across Wales in 2014 was 45%, while the annual average room occupancy rate was 60%.

Figure 5.1 – Serviced Accommodation - Trends in Occupancy Rates - Annual Averages (%)

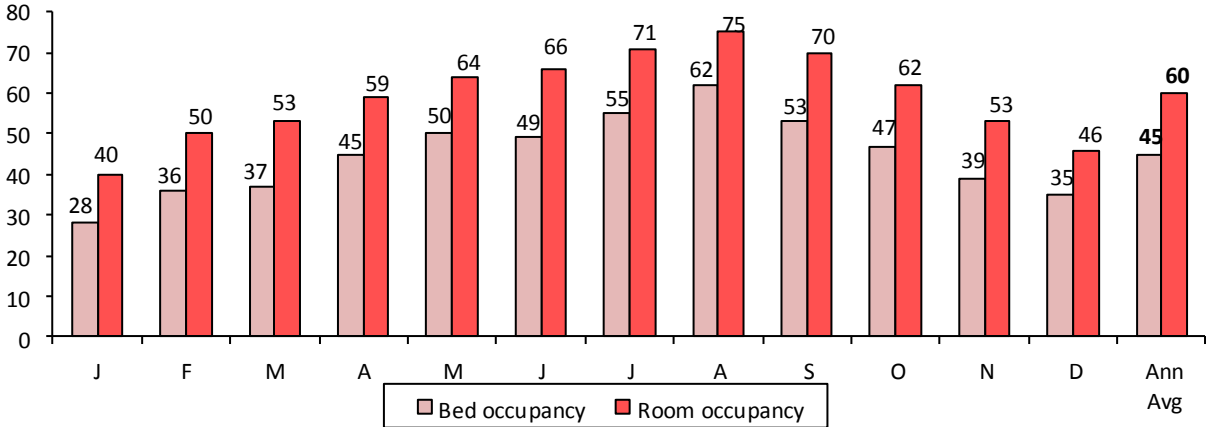


After a four year period (2008 to 2011) in which a rate of 38% was recorded for annual average bed occupancy, the last three years have seen the rate rise to its 2014 level of 45%. The annual average room occupancy rate has also shown a great degree of consistency over recent years with a rate of 52% recorded each year between 2008 and 2012, increasing in 2013 to 54% and in 2014 to 60%.

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 - 2014 (%)



As mentioned previously, for both the Hotel and Guest House/B&B sectors separately, the seasonality of serviced accommodation remained evident in 2014. The average bed and room occupancy rates peaked in August 2014 when rates of 62% and 75% respectively were recorded. Lower levels were recorded outside the main summer season with the lowest averages recorded in January 2014 (28% and 40% 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 the percentage of overseas guests was based on the total number of arrivals. This arrivals information is now not collected, and 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 2014 results (overleaf).

Table 5.1 – Serviced Accommodation - All Serviced Accommodation - Percentage of Overseas Bednights – 2008 - 2014 (%)

Room occupancy	2008	2009	2010	2011	2012	2013	2014
January	5	7	6	6	6	4	3
February	3	6	5	5	4	4	3
March	5	5	5	5	5	5	3
April	6	5	6	6	5	7	5
May	8	6	8	8	7	8	8
June	8	8	8	8	6	9	9
July	11	10	10	10	10	12	10
August	8	8	8	8	9	10	9
September	10	6	8	6	7	9	6
October	5	6	7	5	4	6	5
November	7	5	7	5	3	3	3
December	4	4	7	3	4	7	5
Annual average	7	7	7	7	6	8	6

The annual average percentage of overseas guests has shown a high degree of consistency over the years, with the rates recorded between 2008 and 2014 in the range 6%-8%. However, during this time period there have been variations recorded by month. During 2014, only the months of May, June and November remained at the same level compared with 2013. All other months recorded a decrease. The annual average of 6% had fallen by 2 percentage points in 2014, the same recorded in 2012.

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 accommodation of this type 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 2014 across both independent and agency operators.

Table 6.1 - Self-catering - Cottages and Apartments ALL (%)

Average Unit Occupancy							
	2008	2009	2010	2011	2012	2013	2014
January	24	20	17	29	32	28	24
February	37	43	34	42	41	36	42
March	39	41	37	38	45	43	38
April	48	51	49	63	55	46	53
May	54	55	53	65	48	59	57
June	57	56	60	65	65	56	55
July	64	67	67	71	68	68	72
August	81	75	81	85	81	82	87
September	62	61	60	72	64	65	59
October	50	45	31	55	50	53	51
November	25	22	22	31	36	30	31
December	36	48	35	32	38	33	41
May – October average	61	60	59	69	63	64	63
Annual average	48	50	45	54	53	50	51

The annual average unit occupancy was 51% in 2014, one percentage point higher than in 2013. As with the serviced sectors, self-catering accommodation also continued to demonstrate seasonality in the average unit occupancy rates recorded for each month in 2014. A unit occupancy rate of 24% was recorded in January which rose to a peak of 87% in August before falling to 31% in November (and rising to 41% in December).

There were several variations in the rates recorded when compared with 2013. An increase of eight percentage points was recorded in December 2014, with increases of 6 percentage points in February and 7 in April and smaller increases in July, August and November. A decrease of 6 percentage points was experienced in September with smaller decreases in January, March, May, June and October. Longer term, the average unit occupancy rate of 87% for August was the highest recorded since 2008.

Table 6.2 below presents the annual 2014 occupancy rates for independent operators. As explained earlier in the report, data from 2007 to 2013 has also been provided to illustrate trends over several years.

Table 6.2 - Self-catering - Cottages and Apartments (Independently Let) (%)

	Average Unit Occupancy							
	2007	2008	2009	2010	2011	2012	2013	2014
January	22	23	24	22	24	22	26	23
February	40	40	39	34	39	32	36	37
March	43	43	37	36	32	31	36	31
April	54	48	55	56	62	53	47	50
May	69	61	62	58	60	46	53	52
June	76	67	70	67	59	62	53	53
July	86	76	80	73	69	67	64	68
August	93	87	88	86	87	79	78	83
September	73	69	72	67	69	62	59	53
October	60	52	55	49	48	47	47	46
November	32	26	27	27	25	32	25	26
December	39	42	36	34	30	31	32	34
May – October average	76	69	71	67	65	61	59	59
Annual average	57	53	54	51	50	49	46	46

The annual average unit occupancy rate for independently let properties across Wales was 46%, the same as in 2013. This compares with an annual average of 57% in 2007 and 53% in 2008. When compared with 2013, increases of 4 and 5 percentage points were recorded in July and August, though these were balanced by decreases of 5 and 6 percentage points in March and September. The 53% average unit occupancy rate in September was the lowest since 2007, as was the October figure of 46%.

Table 6.3 presents annual occupancy figures for self-catering accommodation let by agencies for 2008 to 2014.

Table 6.3 - Self-catering - Cottages and Apartments – (Agency Let) (%)

Average Unit Occupancy							
	2008	2009	2010	2011	2012	2013	2014
January	24	16	13	34	41	30	27
February	36	45	35	46	48	35	58
March	35	44	39	44	57	56	55
April	47	49	44	64	58	46	61
May	51	52	49	69	52	68	68
June	51	43	56	70	70	61	58
July	59	54	64	73	69	73	80
August	78	63	78	84	83	87	95
September	58	51	56	75	68	74	72
October	44	36	21	62	56	63	62
November	23	17	20	40	42	40	43
December	29	57	38	34	50	35	59
May – October average	57	50	54	72	66	71	72
Annual average	45	44	43	58	58	57	61

Agency let properties have had relatively stable annual average unit occupancy rates in recent years, with the annual average unit occupancy rate in the range 57%-58% from 2011 to 2013. However 2014 saw increases of 23, 15 and 24 percentage points in February, April and December which helped to increase the annual average unit occupancy to 61%. The 2014 August average unit occupancy rate of 95%, is the highest for any month in the period under review.

The May to October average unit occupancy rate continued its upward trend in 2014, rising by one percentage point to 72%, demonstrating the importance of this period.

Please note that the number of properties that data is submitted for by agency participants is variable from year to year 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, this data is presented 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	2014
January	25	25	31	23	31	25	35	26
February	45	42	40	44	42	36	41	42
March	42	45	38	39	31	38	39	31
April	59	47	53	61	62	57	53	62
May	73	61	71	68	68	58	64	55
June	83	70	74	73	62	69	62	63
July	90	76	85	78	72	65	71	70
August	92	85	88	86	87	81	86	85
September	77	72	82	73	75	61	63	59
October	63	52	68	57	55	47	56	49
November	37	25	38	31	24	34	26	27
December	40	38	38	36	30	28	33	32
May – October average	80	69	78	72	70	64	67	64
Annual average	61	53	59	56	53	49	51	51

Table 6.5 - Self-catering - North Wales – 2008 – 2014 - ALL (%)

Average Unit Occupancy							
	2008	2009	2010	2011	2012	2013	2014
January	21	29	23	33	35	30	28
February	41	38	44	45	40	37	54
March	36	38	42	42	45	52	50
April	49	58	61	63	58	47	62
May	49	66	67	69	53	67	66
June	56	70	69	69	69	61	61
July	59	81	74	73	68	73	78
August	68	89	85	85	83	88	92
September	56	77	75	75	68	72	69
October	48	60	58	60	55	61	60
November	23	38	36	35	41	38	42
December	32	44	37	33	47	35	53
May – October average	56	74	71	72	66	71	71
Annual average	45	57	56	57	56	55	59

In North Wales the annual average unit occupancy rate for 2014 had increased by 4 percentage points, while the May-October figure had remained on a par with 2013. Comparisons across the period 2008 – 2014 show that the annual average has increased by 15 percentage points, whilst each month had recorded an increase in unit occupancy during this period.

The recent trend of declining unit occupancy has changed in 2014 with August achieving a unit occupancy of 92 percentage points, the highest in this review of the past 7 years.

Table 6.6 - Self-catering - Mid Wales 2007 – 2014 – Independent (%)

Average Unit Occupancy								
	2007	2008	2009	2010	2011	2012	2013	2014
January	24	25	16	16	18	18	19	15
February	41	40	40	27	38	33	31	21
March	42	41	40	38	28	31	35	18
April	48	53	59	60	65	55	43	48
May	59	66	64	58	56	46	51	37
June	70	63	70	66	61	63	54	45
July	85	78	81	74	70	74	65	63
August	93	89	91	88	91	86	82	80
September	73	68	70	66	71	66	62	46
October	61	54	54	44	51	46	43	44
November	24	27	23	27	28	29	23	11
December	35	46	31	37	34	32	23	26
May – October average	74	70	72	66	67	64	60	46
Annual average	55	54	53	50	51	48	44	37

Table 6.7 - Self-catering - Mid Wales 2009 – 2014 - ALL (%)

Average Unit Occupancy							
	2008	2009	2010	2011	2012	2013	2014
January	6	12	12	18	18	21	14
February	18	51	32	38	32	31	23
March	32	47	38	28	31	39	20
April	46	38	44	65	55	44	49
May	63	38	47	56	46	54	40
June	65	39	55	61	66	55	44
July	61	50	64	70	73	65	65
August	84	60	78	91	86	82	82
September	68	46	52	71	65	63	49
October	54	33	16	51	47	46	46
November	27	13	18	28	30	23	13
December	46	54	37	34	32	23	30
May – October average	66	44	52	67	64	61	54
Annual average	48	43	41	51	49	46	39

Comparing the 2008 and 2014 figures, the first quarter of the year saw increases in January, February and April of between 3 and 5 percentage points for self-catering properties in Mid Wales. During the remainder of the year, only July saw unit occupancy rise over this period – up by 4 percentage points.

The annual average unit occupancy rate in this region was 39% in 2014, compared with 46% in 2013 and 49% in 2012. The May – October rate also showed a decrease (from 64% in 2012, 61% in 2013 to 54% in 2014).

Table 6.8 - Self-Catering - South East Wales 2008 – 2014 - Independent (%)

	Average Unit Occupancy						
	2008	2009	2010	2011	2012	2013	2014
January	25	28	54	37	43	40	34
February	56	28	52	45	54	46	40
March	47	29	32	36	66	52	44
April	57	54	53	54	52	52	49
May	64	46	53	56	53	60	49
June	63	68	58	56	63	56	50
July	77	83	67	67	74	66	73
August	89	83	75	74	73	71	71
September	75	67	54	57	66	56	53
October	73	58	57	45	70	66	44
November	49	38	40	32	46	38	37
December	63	59	57	38	42	46	38
May – October average	73	67	61	59	67	62	57
Annual average	61	53	55	50	57	54	49

In 2014, the Annual average unit occupancy rate decreased for properties in South East Wales by slightly more than the May-October average (decreases of six and five percentage points respectively). While the average unit occupancy rate rose by seven percentage points in July 2014 (from 66% to 73%), the remainder of the months all recorded decreases, with October witnessing the largest fall, down by 22 percentage points.

It should be noted that no data was available for self-catering properties let by agencies in the South East region during 2014 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 – 2014 - Independent (%)

Average Unit Occupancy								
	2007	2008	2009	2010	2011	2012	2013	2014
January	13	16	20	16	17	22	23	21
February	33	32	40	25	34	28	32	30
March	43	40	36	32	34	29	28	32
April	51	44	56	50	61	50	47	48
May	70	58	53	52	59	40	48	61
June	73	64	67	64	58	60	48	57
July	84	74	73	70	66	61	62	68
August	96	90	86	87	87	77	76	88
September	70	64	65	65	67	58	58	54
October	55	44	44	45	41	39	40	46
November	28	22	17	20	21	25	22	30
December	34	39	29	24	24	23	29	37
May – October average	-	66	65	64	63	56	56	52
Annual average	54	49	49	46	48	46	44	48

In this region the average annual unit occupancy figure for 2014 showed a rise of four percentage points when compared with 2013, while the 2014 May – October figure was four percentage points lower than in 2013. Comparisons with 2007 show that the 2014 monthly unit occupancy rate was higher in only two months (November and December – 2 and 3 percentage points respectively).

On a monthly basis, the largest increase was in June where unit levels reached 57%, a 19 percentage point increase on the 2013 rate of 48%. There were some decreases recorded during 2014, with January and February down by 2 percentage points and September falling by 4 percentage points.

It should be noted that no data was available for self-catering properties let by agencies in South West Wales during 2014. 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

Table 6.10 - Self-Catering - Monthly Unit Occupancy by Coastal Location - Independent (%)

Coastal locations Unit Occupancy (%)								
	2007	2008	2009	2010	2011	2012	2013	2014
January	20	21	25	23	28	21	18	15
February	40	44	44	32	44	22	43	25
March	47	47	40	39	39	29	33	19
April	60	55	51	58	66	51	43	45
May	74	67	70	60	71	44	56	55
June	83	72	76	72	70	67	49	64
July	90	78	85	81	78	65	69	69
August	95	93	95	93	92	78	87	88
September	78	72	79	77	77	60	64	48
October	62	49	58	58	55	31	40	49
November	29	23	21	25	25	24	17	21
December	36	42	34	29	29	21	22	25
Annual Average	60	55	57	54	56	45	46	44

Table 6.11 - Self-Catering - Monthly Unit Occupancy by Inland Location - Independent (%)

Inland locations Unit Occupancy (%)								
	2007	2008	2009	2010	2011	2012	2013	2014
January	24	22	19	22	21	23	27	24
February	40	40	35	30	36	35	35	33
March	37	41	33	33	29	32	37	34
April	45	50	58	52	59	54	48	53
May	61	63	55	52	56	47	53	53
June	66	64	67	61	55	62	54	52
July	79	77	76	68	64	68	63	68
August	91	89	86	84	84	80	76	82
September	65	69	66	60	65	63	58	55
October	56	55	49	43	45	52	49	46
November	38	29	24	25	25	34	27	28
December	44	44	36	34	30	32	34	36
Annual Average	54	54	50	47	47	50	47	47

Coastal locations: The 2014 annual average unit occupancy rate was two percentage points lower than in 2013. While the figures for April, June, August, October, November and December rose (by between 1 and 15 percentage points, these were counterbalanced by greater decreases in January, February, March, May and September. Comparison with 2008 shows that 2014 figures were lower in every month except July, with the annual average being eleven percentage points lower.

Inland locations: The annual average unit occupancy was 47% for both 2014 and 2013 and there was comparatively little variation month-on-month. Compared with 2008 figures, the 2014 figures were lower (by between 1 and 12 percentage points) in every month except April (which showed a rise of 3 percentage points).

Comparing the two types of location, it is apparent that while coastal locations have a higher peak in August (88% compared to 82% for inland locations) for most of the rest of the year inland locations have the higher occupancy figures.

Table 6.12 - Self-Catering (All) - Coastal Location - Monthly Unit Occupancy (%)

	Coastal locations						
	Unit Occupancy (%)						
	2008	2009	2010	2011	2012	2013	2014
January	21	24	23	28	39	26	21
February	44	43	33	44	46	39	41
March	47	40	39	39	54	45	38
April	55	51	58	66	57	46	53
May	66	70	60	71	50	69	64
June	72	76	72	70	71	60	65
July	78	85	81	78	71	75	76
August	93	95	93	92	83	89	91
September	72	79	77	77	68	72	64
October	49	58	58	55	48	55	56
November	23	21	25	25	33	30	33
December	42	34	29	29	38	34	38
Annual Average	55	56	54	56	55	54	53

Table 6.13 - Self-Catering - Monthly Unit Occupancy by Inland Location - ALL (%)

Inland locations Unit Occupancy (%)							
	2008	2009	2010	2011	2012	2013	2014
January	24	21	23	24	28	28	25
February	41	36	34	41	38	35	43
March	42	35	36	36	39	43	38
April	49	60	55	61	54	47	54
May	60	60	56	63	48	56	55
June	64	67	62	62	64	55	53
July	74	76	69	70	67	65	70
August	86	87	83	82	80	79	85
September	67	69	63	67	63	62	57
October	50	50	45	47	52	52	49
November	24	28	28	29	37	30	31
December	39	41	35	31	38	33	42
Annual Average	52	52	49	51	52	49	50

Coastal locations: The 2014 average annual unit occupancy figure was one percentage point lower than that of 2013. Month-on-month the 2014 figures were lower at the start of the year but then rose above the 2013 figures until the year end (except for September which showed an eight percentage point fall. Compared with 2009, most 2014 figures were lower

Inland locations: As for coastal locations, inland locations showed an increase (all be it slight) in the average annual unit occupancy rate in 2014 – from 49% to 50%. Monthly figures fluctuated throughout the year but mostly conformed to the pattern of the previous year. Compared with 2009, the 2014 rates were higher at the start and end of the year, but lower during the main letting season.

Please note than 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 (All) - Average Monthly Unit Occupancy by Tariff (%)

	Unit Occupancy (%)			
	<£299.99	£300 -£499.99	£500 -£799.99	£800+
January	18	32	22	33
February	35	48	25	*
March	28	41	25	14
April	47	67	57	46
May	66	54	66	41
June	68	57	65	36
July	82	65	73	51
August	72	76	88	82
September	79	59	64	*
October	57	55	65	37
November	15	38	15	28
December	23	33	28	40
Annual Average	39	53	57	46

*=sample <5

As in 2013, it was properties charging £500-£799.99 that recorded the highest annual average unit occupancy rate (57%) while those charging less than £299.99 recorded an annual average of 39%. 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 June, July and September.

6.5 Occupancy by grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Table 6.15 shows the annual average unit occupancy rates by grade.

Please note that (a) no properties in the 2014 survey had a one star grading and (b) the sample size for 2 star properties is smaller than for the other categories therefore the results for this category should be treated with a degree of caution.

Table 6.85 - Self-Catering (All) - Average Monthly Unit Occupancy by Grading (%)

	Unit Occupancy (%)				
	2 Star	3 Star	4 Star	5 Star	Not graded
January	42	30	20	23	26
February	49	31	30	60	43
March	37	25	37	34	29
April	*	44	50	68	56
May	55	55	52	68	76
June	75	51	55	68	54
July	75	69	67	79	66
August	82	87	82	90	75
September	63	45	56	81	54
October	53	41	47	68	70
November	49	19	30	28	43
December	30	23	39	37	35
Annual Average	56	44	47	56	52

Within the Visit Wales grading scheme, properties with a 2 or 5 star grading recorded the highest annual average unit occupancy rate (56%) with 4 and 3 star properties achieving 47% and 44% respectively. The highest occupancy rates were found in August with none under 80% and the highest (for 5 star properties) 90%.

For ungraded properties, the annual average unit occupancy rate was 52%, lower than that for 2 and 5 star properties but higher than for those with 3 or 4 stars.

7 Caravan Holiday Homes

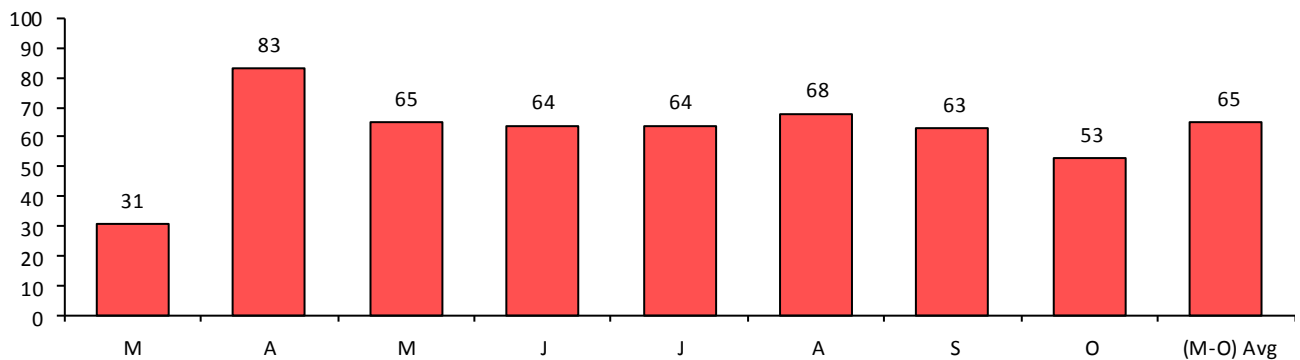
This section presents the information collected from operators offering static caravans (and/or chalets) for let. Occupancy is measured by relating the number of units let during the reporting period (March to October) to the total number available for let during that time.

Please note that due to the small sample sizes in a number of categories, analysis by grading and for sites located in inland areas has not been presented in this report.

7.1 Monthly Unit Occupancy

Figure 7.1 below presents the monthly occupancy rates for caravan holiday homes in 2014.

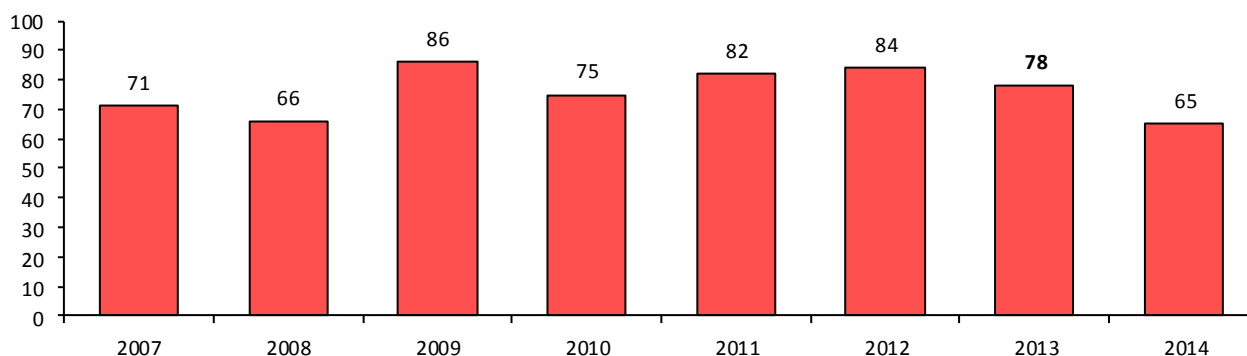
Figure 7.1 – Caravan Holiday Homes - Monthly Unit Occupancy –2014 (%)



During 2014 the highest occupancy rates were achieved in April (83%) and August (68%), with the lowest occurring in March (31%) and October (53%). The Easter period took place in April and as the figures show, this had a huge impact on the occupancy rates during this period.

Figure 7.2 below presents the occupancy rates for 2007 to 2014 for caravan holiday homes.

Figure 7.2 –Caravan Holiday Homes – March-October averages - 2007 - 2014 (%)



The seasonal average for caravan holiday homes remained above 75% in the period 2009 – 2013. However the figure for 2014 shows a drop of 13 percentage points to 65% - the lowest of the years under review.

Table 7.1 –Caravan Holiday Homes – Monthly Unit Occupancy

Monthly Unit Occupancy (%)								
	2007	2008	2009	2010	2011	2012	2013	2014
March	*	*	52	33	19	42	47	31
April	56	45	72	79	80	80	67	83
May	67	60	81	78	79	80	76	65
June	71	71	85	84	80	86	83	64
July	65	73	86	83	86	86	88	64
August	90	87	96	91	93	85	92	68
September	77	71	88	64	85	91	84	63
October	55	37	82	47	69	77	*	53
March to October Average	71	66	86	75	82	84	78	65

*Data not presented due to sample variation between years

With the exception of April, the 2014 occupancy rates showed decreases across all months when compared with previous years – the decreases ranging from 16 percentage points in March to 24 percentage points in both July and August.

7.2 Occupancy by Location

Table 7.9 –Caravan Holiday Homes – Monthly Unit Occupancy by Coastal Location (%)

	Coastal locations Unit Occupancy (%)							
	2007	2008	2009	2010	2011	2012	2013	2014
March	*	*	56	37	19	44	48	33
April	57	52	74	81	84	84	69	84
May	67	63	83	81	83	86	79	67
June	73	74	88	87	83	90	86	64
July	66	75	89	85	88	89	90	65
August	92	84	94	91	93	87	94	68
September	80	73	90	64	87	93	90	63
October	56	36	85	46	70	79	*	53
March to October Average	72	68	88	76	84	87	81	65

*Data not presented due to sample variation between years

The variation in seasonal averages for holiday homes in coastal locations continue to show a degree of variation over the period under review. The May to October average fell from 81% in 2013 to 65% in 2014, a decrease of 16 percentage points.

Again, with the exception of the month of April, there was a fall in occupancy rates between 2013 and 2014 – of up to 27 percentage points in September.

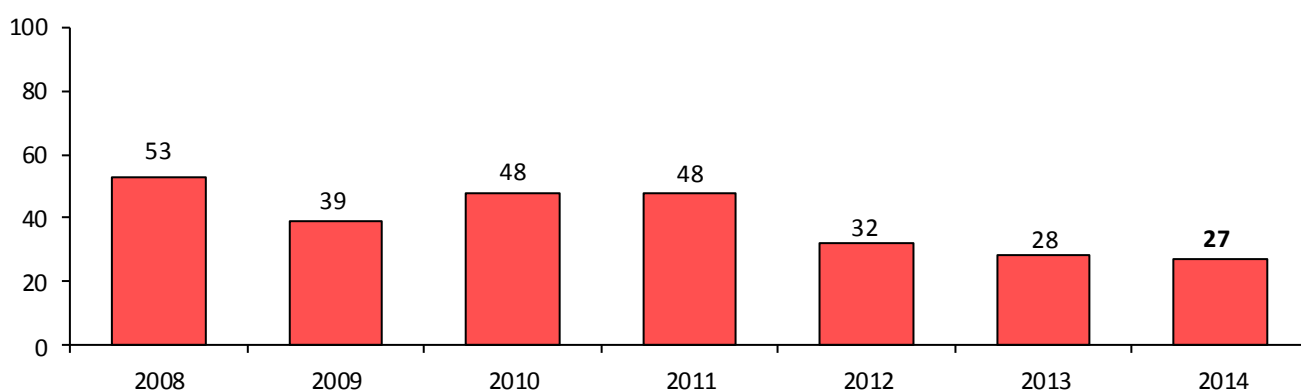
8 Touring Caravan & Camping Parks

This section of the report features parks offering touring caravan and camping pitches. Although 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), very few returns were received outside the main tourist season (May to October). Commentary and comparisons in this section of the report refer to this shortened season of May to October.

8.1 Monthly Unit Occupancy

Figure 8.1 below presents seasonal (May to October) occupancy rates between 2008 and 2014 for touring caravan and camping parks.

Figure 8.1 –Touring – Seasonal Average Pitch Occupancy 2008 – 2014 (%)



The May to October seasonal average has shown some variation over the years influenced, in part, by sample variations in the sample. The 2014 rate of 27% is one percentage point lower than the seasonal average recorded in 2013, five lower than that of 2012 (32%) and only just over half that of 2008.

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 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 (%)

Unit Occupancy (%)								
	2007	2008	2009	2010	2011	2012	2013	2014
March	*	*	12	9	11	9	12	8
April	28	24	27	24	41	18	13	19
May	34	52	35	36	41	20	26	25
June	34	51	35	47	49	33	27	27
July	42	61	45	60	59	39	42	38
August	62	73	61	69	65	52	49	48
September	31	44	32	45	42	25	24	28
October	18	37	25	33	30	14	15	11
March to October Average	37	53	39	48	48	32	28	27

* Sample too 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 give occupancy rates for touring caravan and camping parks in 2014 along with trended historical data.

Table 8.2 –Touring – Monthly Unit Occupancy - Coastal Location (%)

Unit Occupancy (%)								
	2007	2008	2009	2010	2011	2012	2013	2014
March	*	*	9	10	8	14	14	8
April	28	21	25	26	28	21	14	21
May	37	50	40	31	26	21	30	29
June	37	47	41	49	36	36	27	29
July	46	60	61	51	48	47	51	55
August	72	76	80	70	66	65	65	58
September	33	36	38	37	29	25	24	30
October	17	42	22	21	13	19	15	15
March to October Average	40	52	47	43	36	37	33	33

* Sample too small for analysis

Table 8.3 –Touring – Monthly Unit Occupancy - Inland Locations (%)

	Unit Occupancy (%)							
	2007	2008	2009	2010	2011	2012	2013	2014
March	*	*	15	6	14	6	12	8
April	28	30	22	22	47	17	13	17
May	29	56	29	36	49	20	24	23
June	30	59	26	39	56	31	27	27
July	34	62	28	64	64	32	37	31
August	45	68	38	68	64	41	41	43
September	28	48	19	48	49	24	23	26
October	21	37	18	38	36	9	15	10
March to October Average	31	55	26	49	53	27	26	17

* Sample too small for analysis

The 2014 seasonal average for coastal locations stayed at the same level when compared with that of 2013 while inland locations fell by nine percentage points. Compared with 2007, the seasonal average for inland locations has fallen from 31% to 17% (the lowest recorded in this period, having been as high as 55% in 2008). The 2014 figure for coastal locations fared better but still recorded a fall of 7 percentage points when compared with 2007 (40%) – having been as high as 55% in 2008.

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.

8.4 Occupancy by Grading

Occupancy rates for parks were analysed according to their membership of the Visit Wales Grading Scheme. Although monthly averages are presented for March and April, these months have very low sample sizes and it is the May to October average which is referred to in the accompanying text.

Table 8.4 below shows the annual average unit occupancy rates by grading and monthly occupancy rates by grade. Please note that no parks in the 2014 survey had a one, two or five star grading.

Table 8.4 –Touring – Average Monthly Unit Occupancy by Grading (%)

	Unit Occupancy (%)		
	3 stars	4 stars	Not graded
March	*	4	*
April	24	19	8
May	23	32	11
June	21	33	11
July	*	42	30
August	49	51	36
September	23	30	11
October	18	6	12
March – Oct Average	35	26	20

* Sample too small for analysis

As in 2013, within the Visit Wales grading scheme, it was sites with the lower star grading that recorded the highest May to October average in 2013. Sites with a 3 star grading recorded a seasonal average of 35% compared to 26% for those with a 4 star grading. The lowest seasonal average for 2014 was recorded for parks that were not graded, with a rate of 20% recorded for these parks.

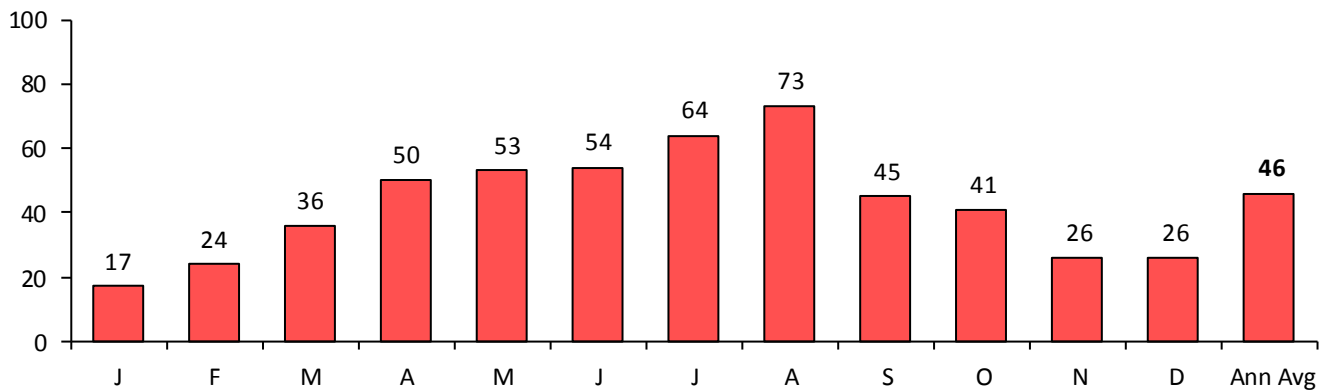
The relatively small sample sizes for this sector, along with variations in those providing data, should be taken into account when comparing data.

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 2014.

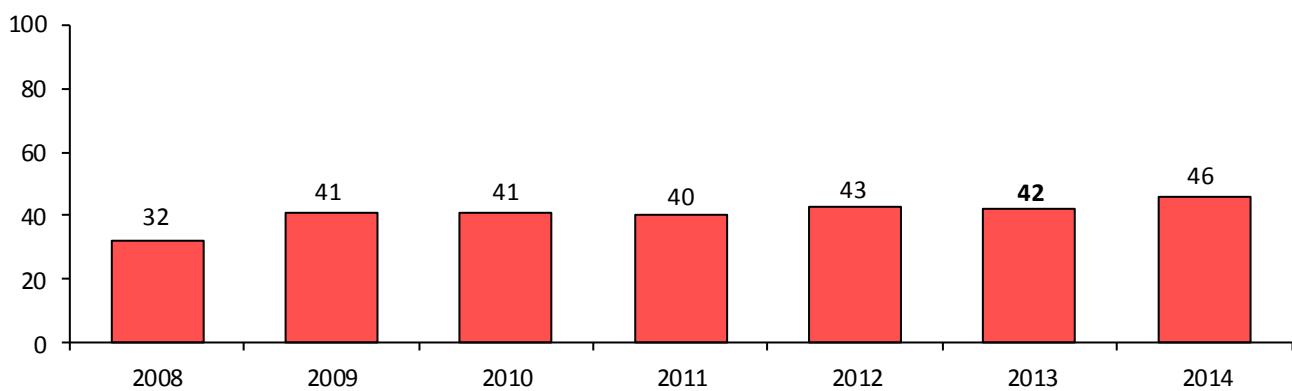
Figure 9.1 – Hostels & Bunkhouses - Monthly Bed Occupancy - 2014 (%)



The annual average bed occupancy rate for Hostels and Bunkhouses was 46% in 2014. When analysed by month, the established pattern of seasonality was again evident with a rate of 17% recorded in January which rose to a peak of 73% in August before falling to 26% in November and December.

The average bed occupancy rate rose steadily between January and April (from 17% to 50%), increased slightly during May and June before peaking in July and August. It then decreased sharply in September (by almost 30 percentage points to 45%).

Figure 9.3 – Hostels & Bunkhouses - Annual Average Bed Occupancy –2009-2014 (%)



Between 2008 and 2013 there was little variation in the annual average bed occupancy rate recorded for Hostels and Bunkhouses. The 2014 rate of 46% represented an increase of 4 percentage points from 2013.

Table 9.1 - Hostels – Monthly average bed occupancy (%)

Average Bed Occupancy							
	2008	2009	2010	2011	2012	2013	2014
January	15	17	14	16	14	15	17
February	23	27	27	28	29	28	24
March	29	34	32	28	39	45	36
April	37	49	48	54	50	39	50
May	48	52	50	50	46	52	53
June	52	53	55	53	64	56	54
July	50	68	64	62	65	62	64
August	50	60	66	61	67	68	73
September	30	40	44	42	43	41	45
October	34	43	41	39	42	41	41
November	12	23	24	22	26	26	26
December	8	22	23	23	26	24	26
Annual average	32	41	41	40	43	42	46

In 2014 only three months (February, March and June) showed a decrease in average bed occupancy when compared with 2013 – although the decrease in March can probably be attributed to the fact that Easter was at the end of March in 2013 rather than in April (reflected also in the fact that April saw an 11 percentage point rise in occupancy in 2014). Occupancy in August 2014 rose to 73% - the highest recorded in the period under review.

9.2 Overseas Occupancy

On the monthly occupancy form, hostel operators (but not bunkhouse operators) are asked to identify the nationality (UK or overseas) of guests staying in the hostel each night. It should also be noted that not all establishments provide this information.

Table 9.2 - Hostels - Percentage of Overseas Bednights (%)

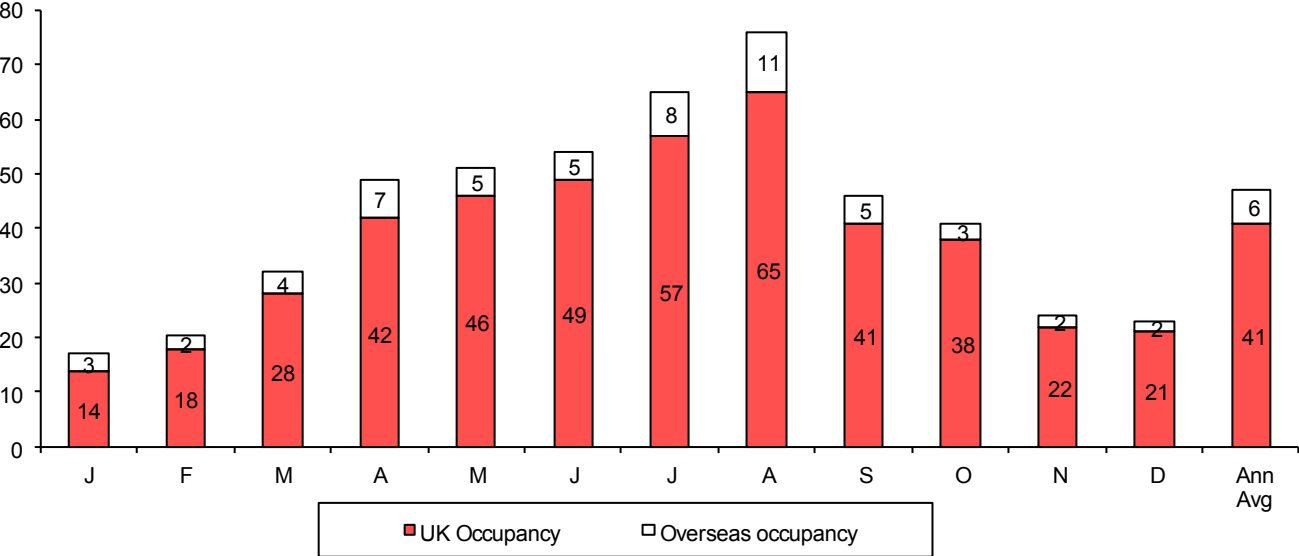
Percentage of overseas bednights							
	2008	2009	2010	2011	2012	2013	2014
January	23	28	17	31	14	18	16
February	11	10	21	21	16	10	12
March	12	17	10	12	17	13	13
April	10	12	9	10	9	12	14
May	11	11	13	10	10	11	10
June	6	14	9	9	8	11	10
July	21	21	18	21	17	19	12
August	13	14	14	14	13	15	14
September	19	13	11	11	15	13	11
October	12	7	13	12	12	11	8
November	16	18	14	7	13	23	8
December	13	16	16	19	12	20	7
Annual average	14	15	14	15	13	14	12

The annual average percentage of overseas bednights fell to 12% in 2014 – the lowest in the period under review. Significant decreases compared with 2013 were seen in July, November and December (decreases of 7, 15 and 13 percentage points respectively).

It should be noted 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 below shows the monthly average bed occupancy rates for UK guests and overseas guests. Again, it should be noted that not all establishments provided a split by origin.

Figure 9.4 – Hostels & Bunkhouses - Overseas and UK Monthly Bed Occupancy (%)



As in previous years, the UK monthly average bed occupancy rates were higher than the overseas bed occupancy rates for all months, with the largest differences recorded in August (54 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 in this chart overseas bed occupancy refers to the number of overseas bednights as a percentage of the total number of bedspaces available (as opposed to the total number of bednights).

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	6	26
February	15	30
March	29	45
April	51	49
May	50	56
June	49	58
July	66	63
August	77	70
September	42	49
October	32	48
November	18	33
December	28	25
May-Oct Average	53	58
Annual Average	42	49

In 2014, hostels located in inland locations recorded higher figures for both the May to October average and the Annual average. Coastal establishments recorded higher average bed occupancy rates in the key summer months of July and August (66% and 77% respectively), while inland establishments' recorded higher rates for most other months in 2014.

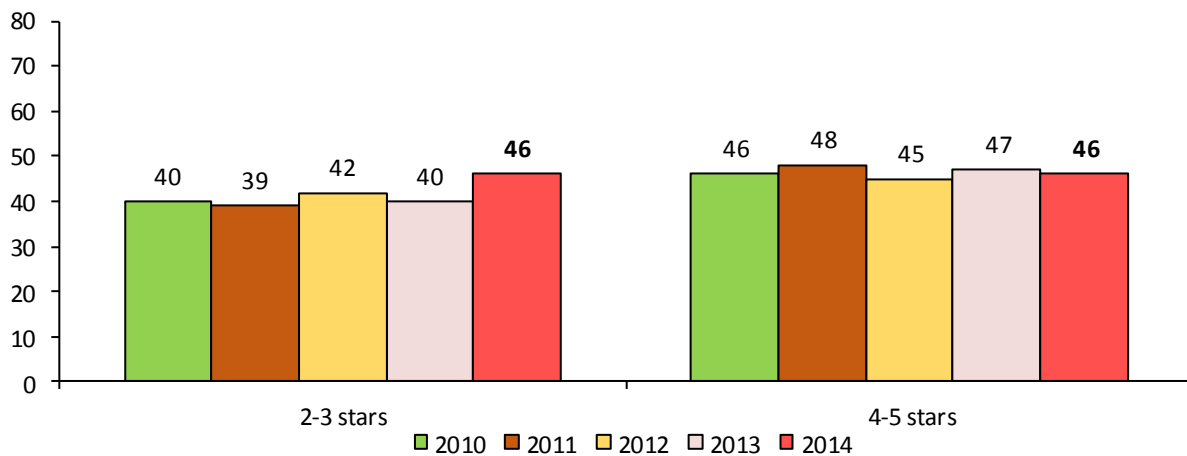
Please note that the sample is low and so this should be taken into account when analysing the results.

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 (%)



In 2014, unlike previous years, establishments with a 2-3 star grading and those with a 4-5 star grading recorded the same annual average occupancy rate (46%). This represents a 6 percentage point rise for 2-3 star establishments and a 1 percentage point decrease for 4-5 star establishments.

Please note that no properties in the 2014 survey had a 1 star grading. Also, caution should be used when interpreting the results because of the low sample size.

Appendix 1 – Hotels

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

	Bed occupancy										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
January	24	25	24	26	25	26	26	27	26	27	32
February	33	33	35	35	34	33	35	35	34	38	42
March	36	37	35	37	38	34	36	38	42	40	43
April	41	41	44	44	40	42	45	45	44	44	51
May	48	46	49	50	49	46	47	46	45	49	54
June	48	49	50	51	47	48	50	49	50	48	53
July	53	52	56	53	52	52	54	50	50	54	59
August	56	56	60	60	55	56	57	52	58	59	65
September	51	51	55	54	51	50	52	49	54	50	57
October	42	42	45	45	45	45	45	45	45	44	52
November	35	34	37	38	38	36	35	38	37	42	45
December	33	32	34	34	33	34	29	31	37	35	39
Annual Average	42	42	44	44	43	42	43	42	44	45	50

Appendix 1b - Hotels: Room Occupancy 2014 (%)

	2014 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	46	58	59	66	70	72	77	80	76	69	60	51	66
North Wales	46	55	58	68	70	72	77	81	76	70	59	46	66
Mid Wales	31	37	43	51	61	58	64	65	63	55	44	38	52
South East Wales	54	67	67	71	61	66	80	71	79	73	68	59	71
South West Wales	40	56	56	63	66	66	77	85	78	67	54	50	64
1-3 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
4-10 rooms	40	38	48	55	66	65	77	77	73	61	45	30	58
11-25 rooms	31	46	48	58	61	62	66	71	66	61	52	46	57
26-50 rooms	47	54	55	60	64	67	72	78	70	63	49	45	61
51-100 rooms	46	59	60	70	75	74	81	83	76	69	60	48	68
Over 100 rooms	56	70	70	76	78	80	85	86	87	80	73	64	75
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	26	34	52	43	49	50	66	60	51	49	37	23	48
£40-£49.99	33	47	46	67	68	67	74	76	68	61	58	34	59
£50-£59.99	43	52	57	59	69	69	74	78	73	66	56	47	62
£60 & over	49	61	62	69	72	74	78	81	78	72	62	53	68
Not graded	45	37	31	42	48	50	62	64	60	48	28	27	48
1 star	-	-	-	-	-	-	-	-	-	-	-	-	-
2 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
3 stars	59	46	51	63	68	67	74	79	71	63	52	43	60
4 stars	57	58	58	66	68	72	78	81	74	69	56	46	65
5 stars	71	58	55	63	71	75	71	73	71	73	53	43	65
City/large town	52	63	58	66	68	70	76	77	73	63	58	48	65
Countryside/village	40	53	53	59	64	62	67	69	65	62	49	44	58
Seaside	43	48	54	63	68	70	77	82	75	66	54	43	63
Small town	32	45	49	56	66	67	73	76	69	62	50	42	56

* Sample size too small to undertake an analysis

- No returns received

Appendix 1c – Hotels: Bed Occupancy 2014 (%)

	2014 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	32	42	43	51	54	53	59	65	57	52	45	39	50
North Wales	32	42	44	56	59	60	63	70	61	56	46	36	53
Mid Wales	21	27	30	36	48	45	50	54	49	42	33	27	39
South East Wales	30	46	45	51	51	49	56	61	54	52	48	44	49
South West Wales	25	43	41	49	54	53	62	71	60	51	42	39	50
1-3 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
4-10 rooms	30	32	38	47	54	52	62	63	56	49	36	24	47
11-25 rooms	21	35	35	47	52	52	58	66	56	48	41	37	47
26-50 rooms	33	38	40	47	50	50	57	66	52	46	37	34	46
51-100 rooms	34	49	46	55	61	56	70	76	69	67	54	44	56
Over 100 rooms	37	48	47	54	55	52	57	63	57	53	49	44	52
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	19	27	40	36	42	40	49	50	41	39	29	23	38
£40-£49.99	19	32	27	46	46	40	46	51	38	46	42	33	36
£50-£59.99	31	38	43	46	55	54	60	68	58	50	46	42	49
£60 & over	35	45	45	54	56	56	61	68	59	54	46	40	52
Not graded	24	25	23	32	38	38	48	52	46	34	19	18	36
1 star	-	-	-	-	-	-	-	-	-	-	-	-	-
2 stars	48	62	62	70	72	71	75	81	74	72	68	65	68
3 stars	23	35	36	49	53	50	60	71	57	51	39	34	46
4 stars	39	45	45	55	55	57	64	69	59	55	45	37	52
5 stars	21	52	52	61	67	70	67	68	67	67	48	41	61
City/large town	30	38	34	44	44	42	56	58	55	53	47	44	43
Countryside/village	28	40	40	47	53	49	55	59	52	47	38	34	46
Seaside	33	40	43	54	58	59	65	74	62	55	44	36	53
Small town	19	30	33	39	50	51	57	62	53	45	38	31	41

* 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										
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
January	14	17	12	12	11	13	10	10	10	8	10
February	21	21	20	20	18	18	17	16	14	17	11
March	21	27	20	21	24	20	20	19	21	21	17
April	36	30	35	33	25	31	31	33	29	23	26
May	41	39	41	40	38	37	34	33	33	36	35
June	47	47	46	43	36	39	40	39	40	37	36
July	54	53	56	47	45	46	42	43	40	48	44
August	64	64	62	57	52	51	47	53	46	49	50
September	46	48	45	43	38	41	39	38	38	36	37
October	34	33	32	31	30	30	31	25	25	24	26
November	20	17	19	20	17	18	18	16	15	17	16
December	18	14	19	15	15	15	13	10	10	15	13
Annual Average	35	35	34	33	29	30	29	28	27	28	27

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

	2014 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales													
North Wales	18	22	27	36	40	42	47	58	52	33	19	17	35
Mid Wales	8	12	18	30	36	37	42	50	37	24	14	11	27
South East Wales	18	25	17	25	36	40	45	41	43	30	39	32	32
South West Wales	11	14	27	36	48	53	65	72	51	36	20	14	40
1-3 rooms	10	15	23	34	41	43	51	53	40	32	18	14	32
4-10 rooms	13	19	23	32	40	43	51	59	48	30	21	17	34
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	-	*
26-50 rooms	*	*	*	*	*	*	-	-	*	-	-	*	*
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	13	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	14	19	22	29	35	45	50	60	45	28	25	19	33
£40-£49.99	12	12	19	35	46	43	44	48	42	29	14	11	32
£50-£59.99	11	18	27	47	54	60	64	79	62	39	21	20	39
£60 & over	*	*	35	39	52	*	*	*	*	45	26	34	42
Not graded	8	7	9	*	32	24	38	47	30	18	*	*	22
1 star	*	*	*	*	*	*	*	*	-	-	*	*	*
2 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
3 stars	13	21	24	32	40	45	53	54	46	25	27	21	34
4 stars	12	16	20	31	40	45	50	57	45	34	20	12	33
5 stars	16	21	36	39	48	48	59	80	60	38	20	28	39
City/large town	*	*	*	*	*	*	*	*	*	*	*	*	*
Countryside/village	13	17	22	31	37	38	44	52	41	29	17	15	30
Seaside	7	12	27	36	49	59	65	74	59	29	14	10	37
Small town	11	18	26	36	52	57	63	65	56	38	30	21	41

* Sample size too small to undertake an analysis

- No returns received

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

	2014 Monthly bed occupancy												Avg
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
All Wales	10	11	17	26	35	36	44	50	37	26	16	13	27
North Wales	13	14	20	28	34	36	40	48	46	31	15	16	28
Mid Wales	5	8	14	23	31	28	36	43	28	21	13	8	22
South East Wales	15	16	12	23	30	32	37	34	34	23	26	21	25
South West Wales	8	10	20	30	41	44	57	68	44	29	15	10	34
1-3 rooms	9	11	19	28	35	36	43	49	34	27	17	11	28
4-10 rooms	8	11	16	25	34	35	44	50	39	26	15	13	27
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	-	*
26-50 rooms	*	*	*	*	*	*	-	-	*	-	-	*	*
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	9	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	10	11	15	23	30	35	42	51	34	25	19	12	26
£40-£49.99	8	9	16	31	40	38	40	43	37	25	11	8	28
£50-£59.99	8	12	20	38	44	47	58	70	45	29	18	16	32
£60 & over	*	*	28	27	42	*	*	*	*	40	21	30	35
Not graded	6	5	7	*	30	20	34	44	25	14	*	*	20
1 star	*	*	*	*	*	*	*	*	-	-	*	*	*
2 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
3 stars	8	12	16	25	31	32	43	43	36	21	18	14	26
4 stars	8	11	17	27	35	38	44	52	38	30	16	9	28
5 stars	11	13	28	28	42	44	58	71	53	35	17	25	33
City/large town	*	*	*	*	*	*	*	*	*	*	*	*	*
Countryside/village	8	11	16	25	32	31	38	45	34	24	13	12	25
Seaside	7	9	20	29	42	47	59	70	46	25	13	6	33
Small town	7	10	25	28	41	42	60	52	43	40	24	16	33

* 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	18	22	32	21
February	35	24	48	29
March	28	19	41	35
April	47	12	67	33
May	67	9	54	23
June	68	5	57	38
July	82	7	65	22
August	72	6	76	26
September	79	10	59	44
October	57	16	58	38
November	15	14	38	30
December	23	9	33	20
<i>May-Oct Average</i>	<i>58</i>	<i>18</i>	<i>43</i>	<i>77</i>
<i>Jan-Dec Average</i>	<i>39</i>	<i>13</i>	<i>53</i>	<i>30</i>

	£500 - £799.99		£800 +	
	Unit Occ (%)	Sample	Unit Occ (%)	Sample
January	20	14	33	6
February	24	14	*	*
March	25	8	14	5
April	57	24	46	9
May	66	30	41	9
June	65	25	36	11
July	73	30	51	23
August	88	34	82	22
September	64	25	*	*
October	65	15	37	7
November	15	12	28	8
December	28	18	40	17
<i>May-Oct Average</i>	<i>16</i>	<i>67</i>	<i>26</i>	<i>31</i>
<i>Jan-Dec Average</i>	<i>57</i>	<i>21</i>	<i>46</i>	<i>10</i>

* Sample size too small to undertake an analysis

Appendix 4 – Sample Sizes

Serviced Accommodation		
	Hotels	Guesthouse/B&B's
	Sample	Sample
January	174	46
February	180	46
March	177	47
April	179	53
May	178	56
June	175	57
July	176	54
August	177	53
September	176	52
October	174	47
November	170	42
December	169	39
<i>Jan-Dec Average</i>	175	49

Self-Catering Cottages & Apartments		
	Independent	Agent
	Sample	Sample
January	168	264
February	159	221
March	140	238
April	144	294
May	145	297
June	157	286
July	151	291
August	154	292
September	156	278
October	141	274
November	139	231
December	141	256
<i>Jan-Dec Average</i>	150	269

Caravan Holiday Homes		
	Caravan Holiday Homes	Touring Caravan & Camping Parks
	Sample	
January	3	3
February	3	3
March	5	12
April	11	30
May	14	33
June	15	37
July	16	38
August	13	31
September	13	29
October	11	23
November	2	3
December	-	3
<i>Jan-Dec Average</i>	9	20

- No sample for this month

Hostels & Bunkhouses	
	Sample
January	14
February	25
March	26
April	27
May	27
June	27
July	28
August	27
September	27
October	25
November	23
December	26
<i>Jan-Dec Average</i>	25